# STAR COLLISION CAUSED DINOSAUR EXTINCTION

**Flavio Ferrari and Roberto Lobl, IBOPE Media Information**

***"The debris from the collision of the two neutron stars heated the atmosphere of the planet Earth and created penetrating particles called neurons. These highly penetrating particles produced in the atmosphere were sufficient to kill any living organism on the ground and in the sea," said Dar, a physics professor at Technion University.***
***(source: http://discoverychannel.ca – December 5, 1996 – Professor Arnon Dar)***

Gathered at Amberley Castle on Friday 13th October, 2006, the WRRS' Programme Committee reached the conclusion that it was time to bravely face the impact of convergence.

In the words of Chairman, Erhard Meier:
*"Print is evolving rapidly through the digital delivery of text. The business models of Print are changing. We now talk about media brands instead of newspapers and magazines. Content is delivered using different platforms, of which the printed form is just one. Offering text and pictures both in print and online, together with audio and video, and providing platforms for online communities, all under one brand name – that is the order of the day!"*

It is easy to verify that the new scenery defines the research industry as it has not been defined for a very long time. The Vienna meeting offers an excellent chance to review visions and missions, in addition to setting up new milestones for the research of printed media.

Still in Erhard's words:
*"How our measurement tools and concepts meet the requirements of this new world, how we help publishers, agencies and advertisers to understand the purpose of different platforms and demonstrate their relevance, how the consumer makes use of them, now and in the future - in short, how we embrace change is the theme of the next Symposium."*

Embracing change means questioning the Readership concept itself, in a world made up of multiple platforms. The subject matter of this paper describes in detail the phenomenon in progress, contemplating the relevant dimensions for our industry, leading to an opportune reappraisal of models of work and business, harmonizing with the upcoming changes. Work is subsidized with the information assembled through a Collective Intelligence process developed amongst the template suggested by the Assiciation Developpement Veille Stratégique – Université de Grenoble (France) – (under the orientation of the most substantial teachers from FEA/USP in Brazil).

## What is happening?

At the end of last decade, some studies were published that pointed to a collision between stars as the possible cause for extinction of dinosaurs. The collision would result in the heating of terrestrial atmosphere, in addition to bombarding our planet with particles called neurons, responsible for eliminating most life in both land and sea. The phenomenon of media convergence has a certain similarity with that event.

Medias, the stars in the communication's universe, accelerate their convergent movement in such a manner that is possible to say that they are in a collision course. The process results on intense alterations in the communication environment, as well as on the extinction of some forms of "life" (corporations and businesses).

Also here dinosaurs, unable to adapt, will perish. Some changes in the environment are already possible to be felt. Conceptually one may group those changes into four relevant streams: interconnectivity, flexibility, multiplicity and role-playing (protagonistic attitude).

Interconnectivity, that has in Internet its key (although not only) representative, results in the possibility of free distribution of information (with no control), that is, without the need for using the massive communication media. It is worth remembering that Internet is a platform, more than a media, and is characterized by freedom (no mediation) of distribution of contents. Currently anyone may, virtually, both generate and share contents in a large scale. A video produced by an unknown Japanese adolescent is accessed by a few million people by means of You Tube (or some equivalent) all over the planet.

At the same time, traditional communication media has expanded their vertical structure, reviewing the product, mission and vision concepts. A business magazine, as an example, is not just a paper publication, the brand begins to be seen as a reference for issues connected with corporate management, able to accommodate, in addition to the publication, websites, seminars, videos, TV programs or any other manner of distribution of specialized contents.

It appropriates and leverages its businesses from the multiplicity of platforms made available by the new technologies. Consumers are also affected by the changes operated in the environment. They have developed increased autonomy and individual authority, in addition to a growing role-playing attitude. They operate on a multi-task mode, are multi-cultural and may develop a multi-character personality, taking over control of interaction with the new world.

To conclude the picture, the “virtual” world merges with the “real” world, as services are made available “on-line” and relationships are built-on in the remote mode (social webs). Some of the effects may already be felt. On one hand new businesses are born, such as “cool hunting”, viral marketing, purchase optimization services and interactive information systems. On the other hand, the traditional pillars of communication are somewhat eroded, with decreased circulation of the printed media, instability of audience of the electronic media, migration of investments to other platforms and, predominantly, the uncertainty before the changes being consolidated.

This does not mean that we are watching the end of the traditional media. As a matter of fact, we are far from that. Everything leads us to believe that the traditional full-page ads and the 30” spots, although necessary, will not be sufficient to account for the communication processes. The autistic-interruptive traditional advertising will give up, more and more, its place to a new interactive-fractal manner of communicating.

In its conventional format, advertising is a unilateral discourse (by the advertiser), that interrupts the contents of the media, imposing concepts on the consumer. A model that works based upon the authority of the advertiser and that of the media that bears the message.

As it is, the new consumer no longer respects those authorities and does not accept the unilateral discourse. New formats in communication must take into consideration such tendency, interacting with the consumer and distributing the message in a fractal (and viral) manner, in order that it may be gradually assimilated.

The final discourse in connection with the Brand will be up to the consumer (and not to the advertiser), built on the fractal elements and ‘under guidance’ of the mass media. Such change will lead to the rupture of the established patterns, habits and attitudes, shaking the market’s structures. To be ready to support the market (advertisers, agencies and vehicles), in this instance, is the great challenge for the research institutes on this decade.

## The WFA Blueprint

The communication industry’s template is soundly based upon advertising. Although, following tradition, the institutes dedicated to media research do not serve directly the “brand owners”, knowledge of their views regarding the new scenery and which initiatives they intend to support is very relevant.

WFA – World Federation of Advertisers has published, at the end of 2005, its “blueprint” under the title “Blueprint for Consumer-Centric Holistic Measurement” (enclosed).

Summarized, the advertisers give vent to their worries regarding the need for truly understanding the multimedia behavior, further disclosing their intention to act in order to update and standardize media measurements for anticipating both the impact and the synergic effect, allowing adequate media matching and selection.

Assessment of fragmented media return (the new ROI), availability of increasingly fragmented targets and preoccupation with the agility and cost of media research research are pointed out as the most fundamental requirements. Linking of the industry (advertisers, vehicles, agencies, institutes) is pointed as the most efficient path and the predisposition for auditing the available services reveals a return to the preoccupation with the quality of the information.

It becomes clear that the advertisers now wish to take active part on the process of enhancement of the assessment systems.

## What do we think about it ?

Continuous tracking of data regarding convergence, communication technology and multimedia, conducted as a part of the Collective Intelligence process of the management group of the media business at IBOPE Group allowed us to follow the evolution of the market’s perception along the last 3 years, in addition to the reactions to the scenery. Of the hundreds of stored pieces of information, we selected some of the most recent and those we felt better represented the context (enclosure).

Both managers of the communications media and providers of specialized services are conscious of the meaning of the changes and they understand that it is not possible any longer to define media from their platform.

> *"Being prepared for that new reality is to understand that the medium is not really so important anymore. Choice of the platform is a consumer's decision".* (Luiz Mendes Junior – Publisher – Associados Minas – BR – Revista da ABA – 06/2007)

> *"What really matters now is the device. What people really want is portability. This is that great change".* (Laura Martin – Media Metrics - Meio&Mensagem – 04/2007)

Differently from that which occurred in the initial steps of this process of change, threats are now understood as challenges and opportunities. There is a new space opened to dream of revolutionary possibilities.

> *"If for the advertiser the challenge is handling the multiplicity of options, for the communication media maybe the basic premise must be understanding that the scenery being transformed is an opportunity and not a threat."* (Eduardo Sirotsky Melzer – partner-director – Grupo RBS – BR– Revista da ABA – 06/2007)

> *"We are evolving from tele-vision to tele-sensation. People will have the feeling of being in the places, while today they can only see things."* (Hirokazu Nishiyama – NHK TV – Japan – Meio&Mensagem – 04/2007)

> *"Although online video isn't yet a profit center for many magazine publishers, it should achieve profitability in the near future, according to a panel of magazine executives discussing online video at "Magazines 24/7," a conference hosted by the Magazine Publishers of America in Manhattan on Tuesday. One key was closing the gap between online video ad rates and those of traditional TV."* (Mediapost – 02/2007)

Nevertheless, it is difficult to accept the consumer's desire to be an active player. Used to control the communication process along the entire extension, the industry resists new business models in which the consumer carries increased autonomy in relation to decisions.

> *"Anything that strengthens the consumer instills fear into corporations."* (Blake Krikorian – Sling - Meio&Mensagem – 04/2007)

Successful experiments are the best antidote for insecurity. In the last 3 years great media corporations have been testing the employment of new models and diversified platforms and gradually find their own paths, seriously considering the possibility of putting aside the old models.

> *"I don't know if we'll still be printing the 'Times' five years from now and really I don't really care much". Internet is a wonderful place and in this terrain we are well ahead of the others."* (Sulzberger – NYT editor – ANSA – 02/2007)

This punctual optimism, on the other hand, is far from contaminating the industry and specifically the newspaper area. The note published in November of 2006's WARC gives a clear idea of the feeling of pessimism in relation to the sector, quoting the NYT as an example:

> *"America's daily newspapers lost 2.8% of their combined circulations in the six months to September 30, according to the latest data issued by the Audit Bureau of Circulations. Sunday newspapers fared even worse in the same period, registering a decline of 3.4%. Even market leader USA Today, published by the Gannett Company of Maclean, Virginia, saw its average paid circulation trimmed year-on-year by 1.3% to 2,269,509. Dow Jones' Wall Street Journal held onto its runner-up position with an average paid circulation of 2,043,235, down 1.9% - but still a remarkable figure for a business and finance-oriented newspaper. Lagging the leaders by a considerable margin in number three position is The New York Times, down 3.5% to 1,086,798."* (WARC – 11/2006)

On the other hand, there is a clear perception among traditional players in the industry, that resistance to change opens the field to new competitors, as the demand for new products and services is real and the technology for offering them is fully available. Comments from Time4 Digital's Todd Unger and Seventeen's Ann Shoket illustrate this thought.

> *In the short term, magazines will continue delivering and expanding their online video content even if it isn't a big profit center, said Todd Unger, senior vice president of Time4 Digital, recently acquired by Bonnier. "If we don't provide it," he added, "there are people in these verticals" that will. Likewise, Ann Shoket, editor in chief of Seventeen magazine, warned: "If you don't have video, you can't have viewers. It's as simple as that."* (Mediapost – 02/2007)

The major issue is that, notwithstanding the communications groups have the disposition to adopt new paths, we are not discussing mere product reformulation. The entire industry is solidly founded on business models there are well-known and effective. Migration to new formats demands significant investments that, on the short term, will not be supported by the old business models, as commented by Paul Maidment, the editor of Forbes.com.

> *Asked what form effective video advertising will finally take, Maidment conceded, "no one has yet found a workable advertising model. At the moment, we're mimicking TV." However, this is already changing, he noted, predicting that ads will "get shorter and shorter ... you're now seeing pre-rolls getting down to three seconds. You'll see more things heading that way."* (Paul Maidment – editor - Forbes.com - Mediapost – 02/2007)

The role played by the research companies in this scenery is crucial. Not only advertisers expect and demand their fitting to the needs (refer to WFA's Blueprint), as the communication vehicles pressure for solutions that support new business. BBC's Sam Smith synthesis that idea in its presentation on the Research 2007 Conference:

> *As types of media blur more and more, Smith pondered where the boundaries now lie. "Radio stations are available on digital TV. Is that television? The Apprentice was available for download. Is that television? The audiences' answer is: we don't care."*
>
> *She said: "Are we as researchers able to cope with this whirlwind of change? In short I'd say no, not yet."*
> *Smith's suggestions for tackling the challenges of emerging media were to make measurement a priority from an early stage in development, **embrace change**, and work together as an industry.* (Reaserch.com – 03/2007)

## All for one and one for all – the communication industry reorganizes

Your company is more and more competitive? That is good, but it may not be fine. In the end of the previous century, the most important word in the business world was "competition". It is common sense that competition be a stimulus for the development both of companies and individuals. But it is not the only alternative.

Nature itself, brimming with examples of the most wild possible competition, offers us much more enlightened models of cooperation (refer to Competition and Cooperation: From Biology to Business Regulation – P.H. Longstaff – PIRP – Harvard University).

One of the most interesting ones is Protocooperation, which occurs when two species help each other without establishing a relationship of dependency. In the world of technology there are endless situations in which companies reunite for development projects, putting aside ancient paradigms. Among communication companies, the cooperative vision gains a broader space, notwithstanding being still under the contamination of the competitive culture.

Even great corporations are already able to acknowledge the advantages of the cooperative model, even if they still feel safer playing the leading role. From that stems the global movement for incorporations and mergers, generating conglomerates each day which are much more difficult to manage. Google is the most relevant example of the neoacquisitionistic model. On one hand, it stimulates development of new businesses, including by its own employees. On the other hand, as soon as the business shows its potential for growth, it treads the path the leads to acquisition.

In reality, the model that appears being the most adequate for the next decade is a hybrid: cooperate to be more competitive.
A recent example is that provided by MySpace that just discloses its intent of promoting an agreement for cooperation with the great media players.

> ***MySpace Negotiating with Media Companies for Content Deals***
> *MySpace is reportedly in the midst of negotiations with "all the major media companies" about bringing their content to the News Corp. property.* (Reuters – 03/2007)

New associations rise to define rules to bring increased comfort for the players:

> *MediaPost reports that a new industry trade association, dubbed the Association for Downloadable Media (ADM), has just been formed, with the purpose of developing standards, best practices and audience measurement for ad inclusions in podcasting and other portable audio/video content.* (Marketingvox – 07/2007)

And companies gather round convergent interests, in order to better understand the world around them.

> *"A new study from MTV, Nickelodeon, and Microsoft surveyed 18,000 kids from 16 countries about how they use digital technology, including cell phones, instant messaging, PCs, TVs, digital cameras, social networks and gaming".* (Cynopsis – 07/2007)

Initiatives such as the Apollo Project in the USA and TouchPoints in the United Kingdom gather the several sectors that make up the communication industry around a common target: the quest for answers.

> ***"Apollo partners form LLC firm***
> *Jointly owned company to see marketing ROI pilot through to completion – and beyond Arbitron and The Nielsen Company today formed a jointly owned limited liability company – Apollo LLC – to see the Project Apollo pilot through to completion. The companies have been working together since 2004 on the project, which aims to gauge the impact of advertising on purchase decisions. Seven advertisers, including Procter & Gamble, Unilever and Wal-Mart are backing the pilot."* (Research.com – 02/2007)

*"The IPA TouchPoints Survey delivers a unique perspective on peoples' lives and offers the industry an opportunity to connect the various marketing and advertising disciplines through new knowledge and shared consumer insight.*
*It provides a common language across the disciplines and interests of the business and is designed to act as the first reference in the development targeted; multi-channel strategies for an increasingly complex world."* (IPA Touchpoints homepage – www.ipatouchpoints.co.uk/index.php)

### What should be measured ?

Operating an exercise of imagination, we are able to visualize the newspaper of the next decade. Let me introduce you to TRUSTIN: The Reliable Ultimate Social Tide Information Network.

On next decade, most of the citizens of the "civilized" world will have a portable communication device able to record sound and image (cellular phone, handheld or similar), with access to internet. The desire to be a protagonist and the necessity to control the outflow of information will be consolidated. TRUSTIN is a Concept-Newspaper that can be developed by any big publisher with a solid brand, with investment capacity and operational flexibility.

It operates as an efficient information outflow manager, mostly obtained through a global cooperative net, continually receiving relevant information from collaborators all over the world from their portable devices.

The team of resident journalists, supported by intelligent systems that organize and verify automatically the consistency of the information, qualify and complement what is received, authorizing the access to the reader's community.

This team will not limit itself to the collaborative sources, although those represent more than 70% of the information obtained to its data-base. It will also operate proactively in search of information, writing journalism, investigating and setting news agencies, incorporating exclusive information to the data-base.

That information is supplemented by analytic reports and by the opinion of resident or hired specialists.

TRUSTIN is the platform of global access to the stocked information, nourished and made available in real-time to the subscribers in their portable devices, notebooks or desktops.

With different levels of access and total possibility of customization, the platform fulfills its objective of offering a communitarian journal, ethnic, specialized, local, regional or global, to the particular likings of the customer, performed in real time.

In addition to that, a synthetic print version of TRUSTIN can be obtained in print stands, distributed locally in specific spots.

The heterogeneity of the collaborators ensures the extent of the information. Executives, politicians, professionals, liberals in all areas of knowledge, as well as the general population, interact continually with the system personally or institutionally (through company's subscription).

TRUSTIN's responsible publisher screens the content. The subscribers, the publicity and the intermediation of contacts are the preferential incoming sources. Subscribers-collaborators receive credits for their contribution, which can be utilized to reduce or eliminate the costs of subscription, or even to result in personal remuneration.

TRUSTIN offers an exclusive system of optimized message distribution to the advertisers. It can all be done on-line, including formatting of the advertising through friendly templates. The advertiser defines the desired target and the intensity of the communication.

TRUSTIN utilizes authorized information from its base of subscribers to select the receivers of the message and collects through verification of exhibition.

TRUSTIN also offers the possibility of researching the subscribers (that receive credits for their collaboration) with methodological support of Research Institutes. Exceptionally, the direct interaction between advertiser and subscriber can be issued, intermediated by the resident team.

TRUSTIN stimulates actions of relationship that may result in real benefits to the implicated parts and monitors the process to ensure the ethics of the relationship.

Through associations, TRUSTIN can also be present in other conventional mass media, such as Radio, Television (informative customized reports), or indoor media (in stores, airports, elevators).

The collaborative-associative spirit of TRUSTIN results in a greater level of engagement with the community of readers.
Institutional actions of TRUSTIN are intentionally focused on Sustainable Development in its most ample meaning. The motto "We serve today's necessity, thinking of tomorrow's" applies for all stakeholders.

The social branch of TRUSTIN supports, particularly, educational activities, by understanding what is better for the planet and strategically interesting for business.

This is, synthetically, TRUSTIN, the next Newspaper.

### Are we ready for that ?

The issue is: are the research institutes with acknowledged tradition and expertise ready for this new reality? On the same moment on which we are assessing the situation, new players and new business models are appearing in the scenery. Quantcast's free internet ratings, GMI's interviews with avatars on Second Life, aQuantive's media planning tools and all sorts of "free" data from Google.

> *"aQuantive's Atlas division is rolling out a tool that will help publishers sell their own online ad space, according to a release from the company.*
> *AdMarket enables publishers to set up their own storefronts to sell online ad space. It also lets the publishers set their own payment basis, be it CPM, CPA, CPM or a combination thereof.*
> *Such personalized tools, aQuantive hopes, will be attractive to publishers looking to regain control over their online inventory.*
> *AdMarket was previously available only to a handful of larger partners publishers."* (Marketingvox – 08/2007)

> *"**San Francisco** - Quantcast, a provider of open Internet ratings data, has raised $5.7 million in its first round of financing, led by The Founders Fund and Revolution Capital, PEHub.com reported.*
> *Launched in September 2006, San Francisco-based Quantcast provides free Internet ratings data for Web publishers and advertisers, challenging the larger providers who charge for their services.*
> *Quantcast allows website owners to sign up and install technology on their sites that reports visitor data back to the company."* (Digital Media Wire – 03/2007)

> *"GMI has taken its dabblings in Second Life to the next level, partnering with Amsterdam-based Derval Research to open 'Interview Corner' in the online virtual world.*
> *Second Life residents who enter the room can choose to take part in surveys on a range of topics, represented by different sofas.*
> *Once the resident decides on a topic and sits their avatar – or character – on the related sofa, the survey begins, with questions delivered and answered using Second Life's in-built chat function."* (Research.com – 09/2007)

> *"Google has decided to make two paid services, from the newly-acquired FeedBurner, free for all, reports TechCrunch.*
> *FeedBurner publishers now have free access to Stats PRO and MyBrand products. Stats PRO gives publishers a more detailed look at their subscribers and what items are being clicked on along with a number of other metrics.*
> *The MyBrand service lets publishers create and offer RSS feeds that retain their domain name instead of utilizing an append from a Feedburner URL. For instance, a regular feed typically looks like this: "http://feeds.feedburner.com/SITENAME."*
> *With MyBrand, the feed appears as "http://www.SITEURL.com/feed."*
> *Both the increased reporting and branding are likely to bring more publishers to FeedBurner's service."* (Marketingvox – 07/2007)

The new interactive digital reality challenges traditional research based upon random and representative samples of well defined universes.

Automated processes, able to offer results in real time, accessed through friendly interfaces, are infinitely much more seductive than good research, methodologically and statistically consistent, which density, depth and complexity of interpretation suggest obsolescence.

In the last years we have debated and assessed alternatives to the conventional models, in same forum of the WRRS.
On the other hand, the commitments that we keep with the entire industry, especially those that are responsible for the market's "currency", prevent us to dare.

To that one may add the fact that the traditional media research is in line with the conventional verticals: Television, Radio and Printed Media. Stars on a collision course.

At the same time, in a parallel universe, players devoid of any tradition or experience devise new measurements. That is not only a threat to the media research business. It is a threat to the entire communication industry.
Both the newborn baseless inventiveness and the delay from the most experienced to offer consistent, encompassing and convincing solutions, constitute a risk for business.

### 13th WRRS' responsibility

The subject could not be more opportune: Readership Measurement - Embracing Change.

The "Call for Synopses" message from our Chairman, Erhard Meier, could not be better posted.

Industry has been challenged to face the most relevant issues.

- Are we now in the business of researching the business of media or are we still only concerned about the written word, whatever the means of delivery?
- Affinity – Engagement - Quality of Contact: which are the measures that work in practice and can be used universally?
- Advertising Effectiveness: what are the new measures, what do they tell us, and how can they be used?
- What are the new developments and insights, the pros and cons of new technology and online data collection?
- How do we make use of databases and how can we integrate them successfully with readership studies? Are databases complimentary or a threat to readership research?
- What is needed to make planning in emerging markets easier?

The collective efforts in search of answers for that set of questions will render us qualified to fulfill the demand both of the present and future.

The 13th WRRS occurs at the most appropriate moment, when we already have enough understanding of the scenery and when the communication industry is sufficiently mature and motivated to invest in a cooperative manner, in order to find the patterns for sustainable businesses.

An outstanding moment for demonstrating where is it that researchers differ from dinosaurs.

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A Note: The authors thank the "trackers" of the Collective Intelligence team, especially Renato Teixeira and Janette Shigenawa, whom have dedicated in a very special manner to executing this work.

**APPENDIX 1 (Not edited)**

## WFA – World Federation of Advertisers

**Blueprint for Consumer-Centric Holistic Measurement**
(http://www.wfanet.org/blueprint.asp)

The purpose of this blueprint is to outline a vision, objectives and recommended actions towards developments of holistic measurement. Work in this area can thus be cumulative and be guided towards a common goal. This document currently reflects the thinking of the advertisers in the WFA Media Committee.

**Vision**: We know our consumers beyond demographics and get information about them in a very timely manner. We truly understand their multi-media behavior and respect their privacy. This allows advertisers to reach their target consumers effectively and efficiently at receptive moments, via relevant content that serves consumers' interests.

**Objectives:** Guide the transition of audience measurement in the industry to accommodate the increasingly complex media consumption behavior of consumers. More accurately anticipate the impact and synergistic effects of media and upgrade and standardize basic metrics so that media options can be compared and be selected with confidence.

**Needs:** Today's mass marketing model is under attack because it is becoming less effective. It needs to evolve or we will erode our ability to build brands, which is critical to avoid commoditization. The corresponding measurement systems must leave their single media silo approaches and accommodate multi-media measurement.

- Marketers live in an environment where improved marketing ROI is a necessity. Media is increasingly fragmented while costs continue to increase; consumers are less attentive to mass vehicles as newer alternatives compete for consumers' time and new technologies are changing media consumption habits. TV planning and buying practices remain entrenched, and mostly limited to demographic specification in the face of an imperative to reach consumers on their own terms.

- The Marketing equation is going to change through the consolidation of retailers and growth in importance of the store as a marketing/media vehicle. Retailer products have become brands and retail stores have become venues for media.

- Advertisers are defining their targets more narrowly, and in terms of consumer interests and behaviors. However, there are no sophisticated target group descriptions in current audience measurement systems and advertisers are unable to measure and track target groups' holistic and synergistic multi-media behavior. New technologies to enable fast and low cost data collection are not being used.

## Areas for Action

**◊ Process Deliverables**

- An analysis of the key issues which currently prevent the development of consumer-centric holistic measurement and a priority oriented action plan on how to overcome them . An audit of existing tools, systems and approaches against the principles of holistic measurement is where we'll start.

- An industry aligned process and framework, inclusive of advertisers, agencies, media and research suppliers and other interested parties to enable broad effective industry collaboration to work above needs.

- Clear operating principles and transparent common metrics across the different media act as a basis for interaction on this subject among all elements of the Industry. Unduplicated reach across different media will become a necessity, engagement and relevance will need to be researched.

**◊ Industry Goals**

- Faster and continuous provision of measurement information. More granular, weekly, data provision will enable marketers and agencies to apply their sophisticated modeling and analyses tools more effectively.

- Large enough sample sizes to measure hard to reach targets and their media consumption accurately and robustly.

- Better linkage of relevant target group descriptions to media measurement capabilities. Today's marketing target group definitions tend to go beyond demographics. The questions used for defining these targets should be asked on a single-source basis in media measurement panels.

- Agile, fast, competitive and adaptive systems that can move at the speed of marketing models and evolving connection opportunities like emerging media . The emergence of high leverage communication vehicles and changes in emerging media and marketing models are happening faster than ever before. Measurement needs to accommodate this to stay at the forefront of new developments.

- Passive measurement systems to better reflect holistic consumer communication behavior.
- A standard method and process for measuring and integrating media in the store .
- Consistent sources of information – and gain superior insights on multi-media behavior from a better understanding of the relationship between shopping and media usage.

### Who is it for?

- Consumers . The consumer's attention is the most precious commodity – this work shows respect for it.
- Advertisers are the end customer, and must drive systems improvements.
- Agencies can operate efficiently if targets and media options are better understood.
- Media suppliers who want to offer integrated multi-media solutions for advertisers.

### Business Model:

We believe that the time is right to pursue this vision with all key market players. The specific business model will depend on what kind of work will need to be done and who will benefit from the results of it.

**APPENDIX 2**

**Data tracked by the Collective Intelligence team - IBOPE Media**

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YAHOO!, TELEMUNDO Y NBC UNIVERSAL TELEVISION GROUP ANUNCIARON EL LANZAMIENTO DE SU NEGOCIO CONJUNTO DE MARCAS EN INTERNET, BAJO EL NOMBRE DE YAHOO! TELEMUNDO. (ADLatina.com – 05/2006)

GOOGLE DEVELOPS NEW TECHNOLOGY TO PROVIDE REAL-TIME FOR TV SHOWS
Search engine giant develops new technology to provide real-time popularity ratings for TV shows
Google rocked the market for online advertising with its ad-serving technology – now the search engine giant has developed software that could revolutionise TV ratings. In a paper presented at the end of May at the Euro ITV interactive television conference in Athens, Greece, research scientists Michele Covell and Shumeet Baluja lifted the lid on Google s new method of detecting what TV shows people are watching.
The system uses software installed on PCs or laptops to pick up and record snippets of ambient audio using the computer s in-built microphone. The audio is then converted into statistics, which are sent to Google s audio database server for identification. By knowing what TV adverts or shows people are watching, Google could automatically provide viewers with relevant information – such as links to product websites or TV show discussion boards. (Network Research – 06/2006)

US NEWSPAPER SALES: THE SITUATION WORSENS
America's daily newspapers lost 2.8% of their combined circulations in the six months to September 30, according to the latest data issued by the Audit Bureau of Circulations. Sunday newspapers fared even worse in the same period, registering a decline of 3.4%.
Even market leader USA Today, published by the Gannett Company of Maclean, Virginia, saw its average paid circulation trimmed year-on-year by 1.3% to 2,269,509.
Dow Jones' Wall Street Journal held onto its runner-up position with an average paid circulation of 2,043,235, down 1.9% - but still a remarkable figure for a business and finance-oriented newspaper.
Lagging the leaders by a considerable margin in number three position is The New York Times, down 3.5% to 1,086,798. (WARC – 11/2006)

'NEW YORK TIMES' MAY GIVE UP ITS PRINTED NEWSPAPER WITHIN 5 YEARS
"I don't know if we'll be still be printing the 'Times' five years from now and really I don't really care much", said Sulzberger. What really matters, according to him, is concentrating on the best possible manner to operate the transition of the printed page to Internet.
Internet is a wonderful place and on that terrain we're ahead of everybody else", said the editor, happy with the increase in readers of the online "NYT" that recorded 1.5 million daily accesses, while the number of subscribers of the printed issue is 1.1 million. (ANSA – 02/2007)

Google plans to introduce cost-per-click (CPC) ad buying in March, to give another payment option to its advertisers who use AdWords to place display ads on select sites, reports MediaPost. (Marketingvox – 02/2007)

ALTHOUGH ONLINE VIDEO ISN'T YET a profit center for many magazine publishers, it should achieve profitability in the near future, according to a panel of magazine executives discussing online video at "Magazines 24/7," a conference hosted by the Magazine Publishers of America in Manhattan on Tuesday. One key was closing the gap between online video ad rates and those of traditional TV. (Mediapost – 02/2007)

In the short term, magazines will continue delivering and expanding their online video content even if it isn't a big profit center, said Todd Unger, senior vice president of Time4 Digital, recently acquired by Bonnier. "If we don't provide it," he added, "there are people in these verticals" that will. Likewise, Ann Shoket, editor in chief of Seventeen magazine, warned: "If you don't have video, you can't have viewers. It's as simple as that." (Mediapost – 02/2007)

Asked what form effective video advertising will finally take, Maidment conceded, "no one has yet found a workable advertising model. At the moment, we're mimicking TV." However, this is already changing, he noted, predicting that ads will "get shorter and shorter ... you're now seeing pre-rolls getting down to three seconds. You'll see more things heading that way." (Paul Maidment – editor - Forbes.com) (Mediapost – 02/2007)

REDMOND, Washington (Reuters) - Lost in Seattle with nothing but a camera phone? Just snap a picture of a nearby building, send off the photo to a database and soon you'll get back a map and information about where you are.
The new Web service is one of over 40 new technologies and ideas displayed by Microsoft Corp. at its research department's annual TechFest fair on Tuesday. (Reuters – 03/2007)

MySpace Negotiating with Media Companies for Content Deals
MySpace is reportedly in the midst of negotiations with "all the major media companies" about bringing their content to the News Corp. property. (Reuters – 03/2007)

Research 2007: Convergence? Fragmentation? We're lost for words
The BBC's Sam Smith tells Research 2007 what media trends mean for the industry
Despite the off-putting title of 'Convergence? Try frag-vergence', Sam Smith's Research 2007 conference paper on the future of media research turned out to make a lot of sense.
Instead of moving towards one device that does everything, she argued, we are ending up with thousands of different devices and services with functions that overlap – and an increasingly fragmented audience.
Smith, head of future media research at the BBC, managed to convince delegates that 'frag-vergence' is more than just a word she and her colleagues dreamt up.
On the day of the release of Sony's PlayStation 3, she noted that the first three months of 2007 have already seen launches or announcements for Windows Vista, Apple TV, Virgin Media, the iPhone and the BBC's YouTube broadcasts.
As types of media blur more and more, Smith pondered where the boundaries now lie. "Radio stations are available on digital TV. Is that television? The Apprentice was available for download. Is that television? The audience's answer is: we don't care."
She said: "Are we as researchers able to cope with this whirlwind of change? In short I'd say no, not yet."
Smith's suggestions for tackling the challenges of emerging media were to make measurement a priority from an early stage in development, embrace change, and work together as an industry. (Reaserch.com – 03/2007)

NRS to produce website readership figures - Survey to track website audiences alongside papers and magazines
The NRS is launching an experimental programme which, if successful, will enable it to provide audience estimates and demographic information on the cross-platform reach of around 70 publications.
Data will be gathered starting in June, and could be made available early next year.
Roger Pratt, managing director of NRS, said: "If the methodology proves successful, we will be able to give publishers and advertisers better tools to understand the consumption habits of consumers across both print and website platforms."
For each publication, the NRS aims to measure the reach of the printed product, the website, and the two combined. (Research Magazine – 05/2007)

MediaPost reports that a new industry trade association, dubbed the Association for Downloadable Media (ADM), has just been formed, with the purpose of developing standards, best practices and audience measurement for ad inclusions in podcasting and other portable audio/video content. (Marketingvox – 07/2007)

Google is serious about casual gaming.
At last week's Casual Connect conference in Seattle, Google's "AdSense for Games" presentation made it clear the company "was actively optimizing AdSense to work with web-based casual games" with plans to move into PC and console games later on, according to GigaOM.
As it stands, AdSense cannot be properly integrated into Flash-based games and are instead marooned on the outer fringes of a webpage displaying a game.
With 1 in 4 web users visiting gaming sites, this is big news for game developers. (Marketingvox – 07/2007)

A new study from MTV, Nickelodeon, and Microsoft surveyed 18,000 kids from 16 countries about how they use digital technology, including cell phones, instant messaging, PCs, TVs, digital cameras, social networks and gaming. The report discovered that tech savvy youth develop more and closer friendships, influence each other's actions as much as marketers do and use digital communications in conjunction with instead of to replace television. Globally, the number of friends that young males have more than doubles between the ages of 13-14 and 14-17, jumping from 24 to 69. Boys aged 18-21 said they have on average 70 friends, the largest concentration among genders and age groups. Practices varied greatly among nations. Japanese kids rely on cell phones to communicate and have few online friends. China has the lowest usage of cell phones among young people, but social networks, blogs and instant messaging are popular. (Cynopsis – 07/2007)

It is only a matter of time until nearly all advertisements around the world are digital.
Or so says David W. Kenny, the chairman and chief executive of Digitas, the advertising agency in Boston that was acquired by the Publicis Groupe for $1.3 billion six months ago. (New York Times – 08/2007)

GMI has taken its dabblings in Second Life to the next level, partnering with Amsterdam-based Derval Research to open 'Interview Corner' in the online virtual world.
Second Life residents who enter the room can choose to take part in surveys on a range of topics, represented by different sofas.

Once the resident decides on a topic and sits their avatar – or character – on the related sofa, the survey begins, with questions delivered and answered using Second Life's in-built chat function.
"I've never been interviewed by a sofa before, but I found the interviewing process much more natural than I'd expected," said Professor Tom Novak, co-director of the University of California's Sloan Center for Internet Retailing, and one of the first to try out Interview Corner.
It builds on the work done by GMI's solutions architect, Mario Menti, who began toying with ways to survey Second Life residents last year.
Menti said: "This is one of the first examples of truly immersive surveys in Second Life, not relying on residents opening their web browser, but their avatars interacting with objects and being interviewed in-world." (Research.com – 09/2007)

San Francisco - Quantcast, a provider of open Internet ratings data, has raised $5.7 million in its first round of financing, led by The Founders Fund and Revolution Capital, PEHub.com reported.
Launched in September 2006, San Francisco-based Quantcast provides free Internet ratings data for Web publishers and advertisers, challenging the larger providers who charge for their services.
Quantcast allows website owners to sign up and install technology on their sites that reports visitor data back to the company. (Digital Media Wire – 03/2007)

Newspaper website readership is growing at a faster clip than the Internet overall, reports MediaPost.
The findings come from a study from the Newspaper Association of America and are based on Nielsen/NetRatings numbers. Visits to newspaper sites grew 5.3 percent in the first quarter of 2007 compared to a 2.7 percent growth on the Internet as a whole.
The average income of a newspaper site's visitor is also more likely to be at or above $150,000. It is not unusual for the group to have made an online purchase in the last six months. They also possess a higher number of professional degrees and use the Internet more often than average Internet users.
While NAA president John F. Sturm says the numbers validate the emphasis newspapers have placed on their online operations, publishers are still struggling to monetize these visitors effectively. Internet revenue growth has not yet grown enough to sufficiently offset declines in print revenue. (Marketingvox – 05/2007)

Google has decided to make two paid services, from the newly-acquired FeedBurner, free for all, reports TechCrunch.
FeedBurner publishers now have free access to Stats PRO and MyBrand products. Stats PRO gives publishers a more detailed look at their subscribers and what items are being clicked on along with a number of other metrics.
The MyBrand service lets publishers create and offer RSS feeds that retain their domain name instead of utilizing an append from a Feedburner URL. For instance, a regular feed typically looks like this: "http://feeds.feedburner.com/SITENAME."
With MyBrand, the feed appears as "http://www.SITEURL.com/feed."
Both the increased reporting and branding are likely to bring more publishers to FeedBurner's service. (Marketingvox – 07/2007)

Some 153 announcements of new or yet-to-be-published magazines were identified in the first half of 2007 by research conducted by Magazine Publishers of America (MPA) - that's a 7 percent increase in announcements compared with the same period last year, writes MarketingCharts.
Within the second quarter, 48 announcements of new or upcoming titles were tracked - a 14 percent increase over the second quarter of 2006.

The MPA also found that 62 magazine digital initiatives were announced in the second quarter of 2007 - a 139 percent increase over the same quarter in 2006, and the highest number tracked by MPA in any single quarter.

Among the new digital initiatives announced by publishers are integrated marketing initiatives, widgets, mobile content, more videos for websites, innovations in user-generated content and social networks, and many website redesigns.
Among the new magazine titles announced or forthcoming in 2007:
30 titles serving affluent readers
21 magazines related to sports and recreation
10 magazines announced for kids and teens
8 magazines with a focus on home and shelter
8 magazines crafted for African-Americans
7 serving the Hispanic/Latino market.
(Marketingvox – 07/2007)

AQuantive's Atlas division is rolling out a tool that will help publishers sell their own online ad space, according to a release from the company.
AdMarket enables publishers to set up their own storefronts to sell online ad space. It also lets the publishers set their own payment basis, be it CPM, CPA, CPM or a combination thereof.
Such personalized tools, aQuantive hopes, will be attractive to publishers looking to regain control over their online inventory.
AdMarket was previously available only to a handful of larger partners publishers.
(Marketingvox – 08/2007)

Newspaper Online Ad Expenditures Up 19%, Print Ads Dip 10%

Ad expense for newspaper websites increased 19.3 percent to US$ 796 million in the second quarter, compared with the same period a year ago, according to preliminary estimates from the Newspaper Association of America (NAA), reports MarketingCharts. (Marketingvox – 09/2007)

Apollo partners form LLC firm

Jointly owned company to see marketing ROI pilot through to completion – and beyond

Arbitron and The Nielsen Company today formed a jointly owned limited liability company – Apollo LLC – to see the Project Apollo pilot through to completion.

The companies have been working together since 2004 on the project, which aims to gauge the impact of advertising on purchase decisions.

A pilot panel of 11,000 people in 5,000 US homes has been operational since the beginning of last year.

Panellists' exposure to broadcast media is tracked using Arbitron's portable people meter, while ACNielsen's scanning technology is used to keep tabs on packaged goods purchase. Additional surveys are used to fill in the coverage gaps.

Apollo LLC will be responsible for expanding the pilot panel into a full national service – providing test results meet expectations and generate marketplace support.

Seven advertisers, including Procter & Gamble, Unilever and Wal-Mart are backing the pilot. (Research.com – 02/2007)

**<u>Illustration 1</u>** – Collective Intelligence Database (internal tool)


| ID | Tema | Assunto | Informação Principal | Ator | Rastreador | Data da Publicação |
|---|---|---|---|---|---|---|
| 1 | TECNOLOGIA/CON VERGÊNCIA DE MEIOS | MERCADO DE PESQUISA | ABRIL REVELA HABITOS DOS LEITORES JOVENS EM RELAÇAO AO CELULAR | EDITORA ABRIL | FELIPEC | 8/8/2006 |
| 12 | CONCORRÊNCIA | CONVERGÊN CIA DE MEIOS | ARBITRON JÁ APRESENTOU PRIMEIROS DADOS DO PROJETO APOLLO | ARBITRON | FELIPEC | 16/6/2006 |
| 45 | CONCORRÊNCIA | MULTIMEIOS | YAHOO E TIVO FOMAM PARCERIA PARA IMPULSIONAR INTEGRAÇÃO WEB-TELEVISÃO | YAHOO | FELIPEC | 21/11/2005 |
| 69 | MULTIMEIOS / INTERNET | NOVOS PLAYERS | YAHOO!, TELEMUNDO Y NBC UNIVERSAL TELEVISION GROUP ANUNCIARON EL LANZAMIENTO DE SU NEGOCIO CONJUNTO DE MARCAS EN INTERNET, BAJO EL NOMBRE DE YAHOO! TELEMUNDO. | YAHOO | FELIPEC | 11/5/2006 |
| 110 | TECNOLOGIA/CON VERGÊNCIA DE MEIOS | MULTIMEIOS | PARCERIA ENTRE INTERNET BANDA LARGA E TV VIA SATÉLITE NA ITÁLIA | SKY ITALIA | FELIPEC | 11/10/2006 |
| 111 | TECNOLOGIA/CON VERGÊNCIA DE MEIOS | MEIO TV | EVOLUÇÃO DA TV DIGITAL UK | TV DIGITAL | FELIPEC | 6/10/2006 |
| 112 | CONCORRÊNCIA | CONVERGÊN CIA DE MEIOS | WAL-MART IS TO JOIN THE PROJECT APOLLO | ARBITRON | RENATOT | 30/10/2006 |
| | TECNOLOGIA/CON | MEIO | PUBLICIDADE NO CELULAR. TESTE NOS EUA E UK. | YAHOO | FELIPEC | 6/10/2006 |

**Illustration 2** – PUZZLE (exemple)