

# The Fragmented Giant

## Publics And Figures of The Digital World

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### Índice

1 Introduction	1
2 Now, the Social Networks	2
3 Segments To Tag Along	4
4 Television and Web	5
5 A Different Society	6
6 The New Figures	8
7 Conclusions	9
Bibliography	9

## 1 Introduction

### 1.1 Methodology, References and Works

**T**O better define the type of audience that a brand wants to achieve, it is obligatory to find ways to segment it. The general population matters for brands to promote their products. However, contemporaneity requires optimizing the image of the audience. The subject of study of this document is the public that, despite its size, fragments itself according to its characteristics and potential for different brands.

Today we wonder: "Where is the audience?", and the researchers say, "Attention is in the new media"(Laermer & Simmons, 2008). That is why the public is nicknamed the "Fragmented Giant". After all, the mass of

people that receives input from trademarks is huge, but depending on the means, personal preferences and media, the public is much divided. We also argue that this has nothing to do with masses of statistics. The Japanese sociologist Yoshio Sugimoto (1997) mentions the concept of "segmented masses", which is useful for understanding this problem.

Society has changed. Hans Bertens presents the concept of "sociality" (2005). The type of relationships kept emerges completely altered, fragmented and typically postmodern. Psychologist Sherry Turkle (2010) analyzes the digital world of our time and notices that in "Facebook Generation" "simplicity" is critical as well as "affinity". Besides these features a range of other ones makes up a certain kind of audiences that are important to better understand. They demand for "vehicles of belonging"and make efforts to integrate communities in social environments where, more and more, we find "post-familiar families" (Idem, Ibidem). It is useful to divide in two types of areas the research developed here: on one hand, we refer to audiences as "technical segments". And, on the other hand, the missing "emotional communities". That is why now brands prefer talking with the consumer.

In what concerns Social Networks, for example, we conclude that although the interaction with advertising is disappointing in some cases, the system of friends' recommendations is convincing regarding the brand-consumer relationship. The brands operate under the plan of creation of new markets, and they must be bold. One of the slogans of the moment is precisely "Segment, Innovate, Experiment, Mobilize, Open and Reorganize"(Berman et al, 2006: p.1). The detected problem is that the contents promote the separation of the different publics.

## 1.2 Subject of Study

From the standpoint of advertising, knowing the kind of figures, customers and segments, it helps to create more effective communication campaigns focused on behaviors and profiles. This document refers to the theoretical arguments of media, videography and diverse data from empirical studies to weave the arguments herein. In terms of studies, Maria João Taborda, Saul Berman et al and Sugimoto's are essential. In the area of Theory of Media and Networks the most important are Rifkin and Chris Anderson's ones. In the field of Advertising, we have Lima & Pinto, Kotler et al, and Laermer & Simmons.

## 2 Now, the Social Networks

Currently, the world of media occupies a central role in the consumer's life. Social Networks are the most effervescent surface of a world of multi-platform novelties. For brands and industry, social networks are a tool to probe some consumer segments. At

a time when we talk so much in segmentation, digital technologies allow to optimize the knowledge that the brand has on the public. For instance, Lima & Pinto states (2011: p.13), only 0.051% of the public interacts with ads on Facebook. In 2010, the advertising business was worth 1,860 million dollars on this network. The problem is that the ads are not working, according to what the Webtrends study says.

Although the public is huge, the future suggests commitment to niche markets, through customization of goods and services (Berman et al, 2007: p.4). Fragmented, the nowadays audiences live in a "society of information screens"(Lipovetsky & Serroy, 2010: p.96, our translation). We are witnessing the emergence of new post-PC platforms and of a supersonic Web, super-media that indicates a "meta-convergence"(Toffler cit. in Ries & Ries, 2005: p.58).

Never was the contents offer as big as now. Never was so much information available. "Ironically, the people of the future may suffer not from a lack of options, but from a paralyzing excess of choice. They can become victims of this post-industrial peculiar dilemma: over-choice"(Toffler cit. in Laermer & Simmons, 2008: p.181, our translation). Toffler hits precisely the problem of current times because the Web is the medium that added variables. The public has access to so many things that it is becoming an undecided "giant", in addition to "fragmented". Each brand operates in its niche, each person his platform, being it a "universe" of customized choices from the global environment. In practice, users and consumers are looking for vehicles of belonging. The public wants "to be assigned"to ideas, trends, movements and objects of worship; it needs

to be connected, learn, participate and feel included, not marginalized and, quickly informed.

Consumers will be able to see, block, and involve more in the advertising discourse (Berman et al, 2007: p.3). This is undoubtedly a challenge that forces you to think of new strategies. The way to pass the message to the public faces the challenge of "fragmentation" and "mobility." The population who appears to be interesting for brands does not stop, it lives connected and refuses to stop consuming media contents. Kotler et al argue that "Customers in the Internet era should be seen as members of communities who share common interests on certain products, rather than as market segments" (2002: p.39). We have two perspectives: in the first one we understand the public as technical segments, while in the second we conceive it as emotional communities.

In the context of the segments understood in a technical way one must consider the "F Factor", being "F" of "Friends, Fans & Followers". After all, these are the ones that influence the purchase decisions of consumers in increasingly sophisticated ways" (Maúl, 2011: p.18, our translation). This is the era of power of opinion and "spreading the word". This is the scope of interest to social networks. Notice that for Kotler et al the "infomediators" and the "one-to-one" marketing are something very real (2002: p.14). In the second context, the community one, Turkle says, "We need children who are given time and protection to experience childhood. We need communities" (2011: p.238). The question is what sort of communities and strategies will be given to them.

Communicate with fewer people at a time can produce more positive results. When

the sphere of communication enlarges, the effect can be massive. For Manuel Faria, General Director of Indigo, a mutation takes place between the major broadcast and pure conversation with the consumer (Lima & Pinto, op.cit.: p.32). This strategy has been increasingly winning space on Social Networks. "In fact, it is expected that more and more Web sites automatically deliver ratings, recommendations and criticisms made by friends with the goods and services that people are searching for" (Maúl, Ibid: p.20, our translation). This does not exhaust the public profile. We also know from the same source that 63% of the recommendations come from family and 31% ones come from friends. For the U.S., 55% of consumers trust the users' reviews (advanced data by Cone, Inc., June 2010). Concerning the Facebook, 90% of people trust recommendations from friends in this social network (data from Exact Target, August 2010). That is, in social networks like Facebook, although interaction with ads does not prove effective in some cases, the system of recommendations from friends is far more convincing in the brand-consumer relationship.

From written science fiction comes another kind of records, where a person in charge of an advertising agency thinks everything revolves around "narrative. Consumers do not buy as many products as they buy narratives" (Gibson, 2010: p.21). And beyond the narrative relevance of the arguments in the preparation and consumption of products and services, brand strategies include entangling public opinions about brands. Maúl detects that "'criticism is the new advertising', a motto for the future" (op.cit.: p.21, our translation). This option makes sense because "Reaching a tar-

get audience with a campaign in a single medium – whether through TV, radio, press, outdoor, Web, etc... – has become increasingly difficult. Even impossible"(Laermer & Simmons, 2008: p.25). "Spreading the word"and "friend recommendations"are two functional strategies. Thirty-two percent of online consumers follow these online recommendations (Berman et al, 2007: p.9). That is to say that the "Fragmented Giant,"which is how the public now stands, requires new methods of communication based more on dialogue, interaction and emotional speech.

Engaging consumers is crucial. "An 'engaged' consumer is a brand ambassador and will communicate the added-values of the brand itself through his Social Network"(Maúl, op.cit.: p.21, our translation). Again, we return to the Network, this super-medium that is our new ground. In the post-Web era, "the creation of new markets requires a new pattern of strategic thinking"(Kotler et al, 2002: p.36, our translation), there are no doubts about this. Separated publics at the level of individual identity may belong to social networks and, consumer groups may belong as well due to the standard of behavior profiles. This means that we are not dealing with statistics masses, but instead with people who communicate and belong to communities. The brands must mingle with the members of these new communities. We are no longer attuned to the static reality. The public needs contents and these are hyper-distributed by the network as long as we spend time accessing it (Pesce, 2007; Anderson, 2007; Berman et al, 2009).

### 3 Segments To Tag Along

According to Berman et al, the future prospects for the industry indicate that the daring ones will be favored. The authors enumerate six priority actions: "Segment, Innovate, Experiment, Mobilize, Open and Reorganize"(op.cit.). In fact, defining what public to reach, presenting new things and applying new strategies in new fields implies one being mobile, receptive and opting for a reorganization. The "Flashmobs", YouTube videos, campaigns for Facebook and Guerrilla Advertising, for example, are new to some extent and they accuse what goes wrong with the conventional media. Dorrian & Lucas (2006) say that TV, street ads and print ads are still expensive to implement by the majority of people. They have become background noise in the lives of nowadays consumers (p.17).

The public is suspicious of brands and believes in their peers. The era of social digital media has increased the public's confidence in itself. The brands respond. Companies like Dell are "micro-segmenting"(Kotler et al, 2002: p.106; Berman et al, 2007: p.4). From this commitment follows another type of problem. Laermer & Simmons believe that the intense media fragmentation has made it difficult to reach target-consumers in significant numbers (2008: p.23). That is to say, exaggerated segmentation considers better reaching the public but, it makes difficult massive communication with return on investment. Amidst the mini and micro-audiences the customized are the ones that represent the most balanced "Empowered Consumer".

From Japan, Yoshio Sugimoto (1997), a well-known sociologist, uses new and use-

ful designations within the segments. Based on a study of consumer behavior made by the Hakuhōdo Research Institute, Sugimoto divides into two types the big mass of public and "mass society"; firstly, we have the emerging, divided and small "individualized mass" [*shoshu*]; secondly, we have the opposite, the large-scale "uniform" non-differentiated masses, [*taishū*]. Furthermore, the Hakuhōdo Institute points out the concept of "segmented masses" [*bunshū*], which relates more effectively to the behavior of consumers (p.9). In short, the homogeneous entity of the mass does not explain everything. Moreover, the "individualized mass" has been growing and has been preparing the way to the notion of "segmented mass" that will become more applicable in a near future time.

#### 4 Television and Web

Within the current scope, consumption contents promote the separation of audiences. There are less and less families watching TV programs together. Where are the audiences then? According to an analysis of the Willard Bishop Consulting Company in 1995, a TV spot used to reach 80% of the population. In 2003, adolescents and young adults spent more time on the Web than watching TV. In a 2005 study, respondents reported having the TV on but did not pay attention to it. The focus is on the new media (Laermer & Simmons, 2008: p.25). Just before these notes, Mark Pesce (2007), one interested in technology, says that 3% of TV contents were being downloaded online. Pesce suggests that TV is history. The problem is not in the media because even the advertising finds fragmentation in itself.

In "The End of Advertising As We Know It" (Berman et al, 2007: p.2) data collected for a global survey by IBM is referred. In this data, 2400 consumers and 80 advertising executives from around the world gave their contribution. Furthermore we are told that in the near future the "economy of attention" is central and that consumers will control what they see best, avoiding ads. The IBM study suggests that the "computer time" exceeds the "TV time" with 71% of people using the Web in addition to two hours daily (Ibid, Ibid, p.3).

In a more recent study done by Maria João Tabora (2010), is mentioned the experience of viewing television contents across different platforms and types of screens. Regarding Portugal, Tabora stresses that the main segment of public TV is aged between 15 and 24 years old, a segment relatively close to the Pesce's presented in his report in 2007. Tabora also states that 15.1% of the audiences watch movies on their computers or download them from the Web. Relying on 2009 data, this report points to the global audiences, both male and female, with 37.4% of people watching films through the network or computer. Pesce had already said that the public is no longer in front of the TV. The Web replaced where it "is."

The World Wide Web appears in 1994 and the "Multi-User Devices" became the "commonplace" for many people since then. Chatting Web sites and instant messaging programs appeared and attracted the crowds. ICQ, Yahoo! "chat rooms", MSN Messenger, among other successes, prepared us for the post-PC revolution of the mobile platforms and social networks. The reason this is a different world, according to Mark Pesce (op.cit.), concerning consumption and types

of consumer, relates to the fact that advertisers are not selling things to the same audience. The rules of the game have changed. There is a new available audience and it is a young one who is not still or quiet. For Pesce, this is a very "savvy" public. The author believes that this public is very proficient and is composed of young people who are determined to get what they want, even without permission.

Products change, the media change and the consumer also changes his role: goes from the owner of goods to the lessee, leasing instead of buying. Software, services and automobiles are some examples (Kotler et al, 2002: p.12; Rifkin, 2001: p.18). It seems from the outset that the brand is controlled by us, the consumers (Ollins, 2005: p.18). However, in the new media, such as social networks, the user participates in something that is not his. He is as corporate as in "cloud computing". This means that the consumer is outside the network. He accesses to it, consults it, takes part in it, but does not manage it. And here it becomes important to invoke Sugimoto's designation "segmented mass." We returned to "masses" but now they are fragmented.

If before one talked about the amorphous culture of consumption, now one talks about segments. Agencies dream of the moment when the whole family gathers together again, to thereby facilitate the communication of the product. Researchers believe the public who has better wages lives happier. On average, enriched populations live happier in the wealthier countries (Kelly, 2010: p.78). And in general, what we have are "masses" and "segments", more or less intelligent, more or less happy. But according to Turkle the "post-family households" are in-

creasing (2011: p.280) where "affinity" is essential beyond blood ties.

## 5 A Different Society

New figures are numerous. Society is different. The consumer does not enjoy the present generation media, such as the Web, so individualistic. Now one lives up to the age of Networks and the Collective. For Howard Rheingold, the new "unstoppable crowds" are the "heroes of a world that exists after the Internet". Environments invaded by mobile and geo-referenced media transform the public and social sphere (2000: p.86). In the early 90s, science fiction writers like Neal Stephenson called this whole digital universe "Metaverse." In the novel *Snow Crash*, Stephenson states that "Metaverse distorts the way people talk to each other" (1993, p.60). Approximately at the same time of Stephenson, Alvin Toffler audaciously considers that there are new heroes, too. The social dimension is so much affected by the digital that makes sense to speak of a "multi-channel society" (1991: p.372). A decade after Toffler the not least important François Ascher identifies a "hypertext society" (2001: p.7-8). The simultaneous mobilization of individuals in the real world and the world of communication changes the type of citizenship. The brands whose products had little space on supermarket shelves have on the Web the perfect space for disclosure. For instance, the retail chain Tesco in South Korea creates digital storefronts to satisfy consumers equipped with iPhones.

The Web is the first means of mass communication that is both an instrument of use and access as well as its own type of pro-

duction. Consumers use, produce and share the Web. Amateurs and semi-professionals produce "low-cost" advertising. The trend of "User-Generated Content" increases and it is looked for by 39% of respondents in the Berman's study et al (2007: p.3). Toffler was the first to bring forward the end of the line between production and consumption, when he suggested the "prosumer" ("producer-consumer").

In the realm of science fiction, Bruce Sterling said that if we consider the hardware of digital media and good reasons to use it, "everyone becomes media" (2002: p.169). The current networks are implementing it. What changes at a social level is the very notion of "sociability." Hans Bertens criticizes the new behavior and classifies it as "post-modern." For him the concept of "society" is being replaced by a newer one "sociality" (2005: p.225). It is the superficial that prevails.

Updated and more specific studies make us believe that "the Facebook generation accesses the Internet with different expectations" (Turkle, 2011: p.256). The Web and the public have changed and the media are all conniving with the Network. The platforms are not fully virtualized and the result of that is the "creatures of the screens" prevailing, more and more (Gibson, 2010: p.155). Besides this, Social Networks occupy a new space where the social is failing. Bauman et al, for example, had already said that "we had left the era of reference groups" (2000: p.7). Are we in the era of "reference brands"?

The networks are simply filling a gap type: the "digital loneliness," as Sherry Turkle points out. The Network and the crowd are merging themselves. Such an event is

due to the fact that people are already a mean in themselves. Notice that Alvin Toffler anticipates the crowd as the first means of mass media (1991: p.389). The "consumer society" praises itself with brands, packaging, ads and clichés. The growing "capitalization of sociability" has led to that objects and items of consumption are not the only elements capitalized. Relationships have become the new target type of brands. Rifkin points to the "commodification of relations" (2001: p.23). The figures of consumption and society change because one invests more in relationships and individuals. People and relationships are considered as the "new capital". Nobody lives without other people.

The roles of the public have changed because each person has been personalizing his world of media, contents and applications. It is a matter of density. The information available is such that changes our behavior. Glen Hiemstra, founder of Futurist.com, shares this concern: "The lack of empty space. (...) there is no empty space. (...) All this changed us" (in Doug Kaye, 2007). It follows that we understand the audience, specifically the youngest, as a changing one. This is an audience that even represents itself differently. Sherry Turkle recognizes that the "social media" highly frequented by the "Facebook generation" asks us, users, to represent ourselves in simplified ways (2011: p.185). There are so many users of Social Networks that "simplicity" is the key.

At the present juncture, an individualistic celebrity is no more irreverent; the new famous ones are collective, groups, networks and teams. We are witnessing the rebirth of the crowd. The figures of today's "multi-

society are social, eventually leading above all in a system of participation. The networks that emerge are held by everyone and anyone (Cory Doctorow cit. in Rheingold, 2002: p.63). The "Fragmented Giant", so to speak, must be something else, an audience in tune with itself, where people are closer to each other, in short, communicating better. Despite the corporate aspect, the social networks encourage the feeling of "sharing", the "us". Sometimes it seems we are too connected.

## 6 The New Figures

Among the dominant figures of our time are the younger crowds. For brands, these young audiences are a tempting target, a segment located between 18 and 25 years of age (taking into account the report of Mark Pesce, 2007 [about 2006 data]). This is the consumer audience that buys what is trendy and is "cool". Moreover, this is the demographic that is not at home watching TV. By following a more organized view of the emerging figures we have to analyze the report made to the IBM Global Business Services, titled *Beyond Advertising: Choosing a Strategic Path To The Digital Consumer*, pursued by Saul Berman, et al (2009), which creates three types of public in evolution: the "Massive Passives", the "Gadgetiers" and the "Kool Kids".

The segment of the "Massive Passives" is according to the report 65% of people experiencing the media in a traditional perspective. Participants in this segment think that each medium should have specific functions and like to sit watching TV (Idem, Ibidem: p.3). On a second level, we have the "Gadgetiers" (Idem, Ibidem: p.4), which include

10% of people interested in technology and that evolved from the "Massive Passives". For these people access to Web sites and using multifunction devices simplifies and enriches their lives.

Finally, we have the "Kool Kids", which are representative of about 20% (Idem, Ibidem: p.6) market surveyed in the study. They are under 24 years of age and their lives are shaped by technology and not the opposite (Idem, Ibidem; Sundberg, 2011). This segment can also be understood as a different phenomenon, a way of technology interfering in the childhood and adolescence of the youth because young people like to be constantly connected to their favorite equipments. It is crucial that these young people get a "total device", ideal for all kind of things they like to do.

The third public likes to see contents on the Web, where and how it wants, regardless of the platform. In turn, the "Kool Kids" and the "Gadgetiers" prefer machines. The first ones like "entertainment", while the latter use the media to work. The "Kool Kids" are part of the segment that downloads the contents from the Web. Thus, they benefit of a new type of distribution that Chris Anderson calls the "Hyper-Distribution" and Mark Pesce "Webcast". The audiences have changed; new figures burst of energy because the place where we could see images before multiplies. Regarding this new type of behavior that requires individuals to be "multitaskers", Turkle points especially their higher productivity and ambition. The same kind of phenomenon is detected by the futurist Glen Hiemstra, who states that "now, kids are multi-function and multi-task"(ult.op.cit.). We are in this standoff between the simultaneity of operations and

fragmentation. The wisest course is to speak of "audiences" and not of a single "audience".

## 7 Conclusions

### 7.1 Results

To the fragmentation of audiences corresponds the fragmentation of available media. It is certainly a socio-technological issue. Note that the researcher Sherry Turkle says that the phenomenon of "multi-tasking" makes the youngsters ambitious and more productive. Wherever a consumer goes today he is confronted with people, 'local' people and 'global' people, sedentary and travelers, consumers and entrepreneurs. The range, over-choice, unlimited supplies have become common and problematic. The brands face heterogeneous audiences.

The sociability of the consumer changes depending on the means this uses. Three major types of consumers are identified by Saul Berman, et al (2009): the "Massive Passives", the "Gadgetiers" and the "Kool Kids". We refer to the universe of TV and Web consumerism, the two major means of public aggregators of our time that probably will merge. Web TV starts that. It should also be noted that the "segmented mass" of audiences grew and demands affinity among its peers and branded products. The public seeks communities that share its interests. It does so also through the Web.

### 7.2 Future Challenges

We are observing a capitalization of sociability. The brands realize the importance of exclusivity and how consumers need to belong to communities, to relate to each other. This

commodification of relations is a problem of our time (Rifkin, 2001). In this way one can understand why the "economy of attention" is relevant (Berman et al, 2007). Brands that manage attention, relationships, control networks, dominate the public.

In response to this the public believes more in people and less in brands. Brands choose to operate along with niches. In turn, the technologies audiences use, change considerably. It is the post-PC era and post-Network demanding that the audience is on-line. Instead of having more things that link together, the space that separates the public increases. Fragmented, this one quests for socializing, joining communities and assimilates narratives. Its excessive mobility turns difficult for brands to create new markets; only networks eases up contact between everyone. Moreover, the tags must be bold. In a mid-term, perhaps consumers and brands create new societies together.

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