Reinventing Marketing

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Introduction: Marketing's golden promise

Making without marketing is wasting. If companies produce products or services that customers don't want, or if customers cannot access them, or if customers aren't aware they exist, then all the time, effort, resource and money that went into making them is wasted.

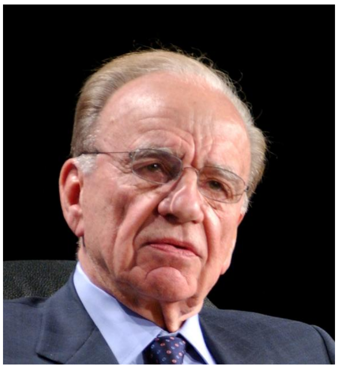
Good marketing therefore turns potential waste into rel wealth, which is a valuable contribution.

So why do we need to reinvent marketing?

For a very simple reason. The central economic contribution of marketing is efficient matching and connecting - matching supply to demand and connecting buyers to sellers. We will always need to do this. But right now, the environment in which this task is undertaken – and the best means to achieve it - are changing, rapidly and fundamentally.

This White Paper explores these changes and what they mean for marketers.

'All change'



Murdoch: 'power shift'

Rupert Murdoch summed the issue up – and effectively made it 'official' – when he observed, in March 2006 that "Power is moving away from the old elite in our industry. A new generation of media consumers has risen demanding content delivered when they want it, how they want it, and very much as they want it."

Compared with the old world of top down, centrally controlled, 'appointment viewing' media this is a radical shift in the commercial environment. Most practitioners accept this. But as with most paradigm changes, most practitioners, who are seeped in the old ways of doing things, are still failing to grasp its true implications.

How to adjust to the new media ‘channels’? How best to communicate with hard-to-reach ‘target audiences’ as they migrate to these new channels? The marketing and media worlds are now abuzz with debate about such questions. Yet the very way they are framed – using terms like ‘channel’ and ‘audience’ - shows they are still missing the point: <u>the era of marketing as messaging is over</u>; to continue achieving its golden promise marketing must rethink what it does, and how, from top to bottom.

In particular, marketers need to face up to three unpalatable truths.

<u>1) Consumers don’t like marketing</u>

This is a legacy of marketing’s origins in an industrial age when value creation revolved around ‘the product’ with a message about the product then sent to consumers via top down ‘broadcast’ media. This generated a schizophrenic attitude towards consumers among marketers. On the one hand, they that to prosper, companies have to identify and meet consumer needs: the acid test of success for a product is whether the customer is willing to buy it.

47%	UK consumers not wanting to be contacted by marketers at all Precision Marketing magazine, September 2005
67%	US consumers interested in products or services to help “block, skip, filter or opt out of ” being exposed to advertising and marketing Yankelovich, Marketing Resistance Survey, 2004
96%	UK consumers “always look for, and tick, the opt out box” in when filling in forms Precision Marketing magazine, September 2005

On the other hand, marketers never applied the same philosophy to their marketing communications. As far as they were concerned, the value they were offering resided in the product; the communication was designed to persuade consumers to buy the product, thereby turning this value into cash for the company.

So, while the product was designed to meet a consumer need, its marketing was designed to meet *the company’s* need. And consumers, who are not fools, were well aware of this. They might ‘love’ the product, but almost universally they were indifferent, sceptical or hostile to its marketing, which was seen as largely irrelevant, sometimes irritating or intrusive.

The fact that consumers don't like marketing didn't really matter, however. Until recently, that is. The prevailing media environment meant they were exposed to advertisers' messages anyway: advertisers could work on assumption that by purchasing media air time or space they were, at one and the same time, purchasing consumer attention.

It is absurd to think that interrupting *Lost* with a message is a good way for consumers to access the information they need to make better purchasing decisions

But what happens in a world where consumers can demand the information they want, "when they want it, how they want it, and very much as they want it"? In a world driven by bottom up consumer search rather than top down seller messaging, Will consumers bother searching for sellers' advertising?

The answer, of course, is No (in the vast majority of cases). Consumers will search for the information that helps them in their search for best value from the marketplace, not for information designed to bias them in favour of a particular seller's offering.

The implications of this shift go deep indeed. It means that in future:

- advertisers will have to *earn* consumer's attention rather than paying media owners for it
- to earn consumers' attention, they will have to provide consumers with information and content that fits the consumer's agenda rather than their own
- the once-umbilical connection between 'media' and 'marketing' is being eroded. It is absurd to think that interrupting *Lost* with a selling message is a good way for consumers to access the information they need to make better purchasing decisions, for example: information as a service to the consumer points to a very different approach

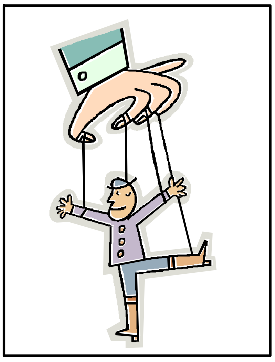
The combined, net effect of these three trends is simple and clear. Marketers will have to re-invent marketing as a service to the consumer – something which adds value in its own right and is 'worthy buying', just like the product. Marketing will have to cure itself of its own schizophrenia. And approaching the issue in terms of 'changing communication channels' and 'how to reach audiences' – the need to adjust 'the media mix' – simply fails to recognise any of these changes.

2) Marketers are no longer in control

Actually, marketers never were in control. Even so, the history of marketing is that of *a quest for control*. The goal of marketing has been to organise and change consumer attitudes and behaviours in favour of a particular brand, and this has taken two main forms: *mind cuckoo messaging* and the *God quest*.

Let's briefly look at each in turn.

Mind cuckoo messaging



The cuckoo, you will remember, lays its eggs in another bird's nest – pushing the bird's original eggs out of the nest to make way for its own. The cuckolded bird then feeds the new chicks as its own. Most marketing communications is an attempt at mind cuckoo messaging: to insert the message of a particular brand or company in the consumer's head (and to dislodge other, rival messages along the way) so that the consumer acts on that message: to prefer and buy that brand (and not another).

The advertising industry is a mind cuckoo messaging industry. All its concerns with 'creativity', share of mind, share of audience, impacts, 'opportunities to see', gross percentage ratings and so on revolve around the search for the most effective message and the most effective means of delivering that message.

There's only one thing we need to remember about messaging. It is not a service to the consumer. It is a service to the seller.

A God Quest

Marketing has its roots in a scientific industrial age in which people believed fervently and fundamentally that knowledge is power. If you know everything there is to know, say, about an ore, then you can mine it out of the ground, process it and

> transform it into a form that is useful to you. You can make it into steel, for example. Then you can turn it into motor cars.
>
> Likewise, so the assumption goes, if you know enough about ‘the consumer’ then you can process it – pressing the right buttons, pulling the right triggers, and so on – to transform its behaviours into a form that is useful to you. The more data you have – about his or her demographics, psychographics, habits, attitudes and so on – the more ‘insight’ you can gain, and therefore the more efficient and effective your button pushing and trigger pulling will be. This is the dream of database and direct marketing: to discover the right stimuli in order to achieve the desired response. To do this you need data. The more data the better.
>
> A bit like God. God is omnipotent because he is omniscient. Behind the database marketing industry lies a wish: ‘If only we, too, could know everything, then at last we would be in control!’.

In reality of course, consumers are not lumps of ore. They have their own minds, purposes and intentions, and because of this the power of messaging has always been extremely limited. Also, nobody can ever know everything.

Messaging has, however, often *seemed* more powerful than it really is, thanks to *the advertiser’s illusion*.

**It was never really about seller messaging.
It was about consumers’ search for value**

The advertiser’s illusion has its roots in demonstrable fact: when advertisers advertise a product or service, sales go up. Or – the other side of the coin – if they fail to advertise, sales begin to drift down. Advertisers therefore observe (or hope to observe!) a clear link between cause and effect: ‘if we put a message out into the marketplace, consumers act on it’. This explains the rise of mind cuckoo theories of advertising effectiveness ,which in turn becomes a quest for ever more control.

In reality, however, the real dynamics have always been very different. Consumers have always operated in ‘search and filter’ mode, looking for information that's useful and relevant to their lives, acting upon it when they came across it, and filtering out and discarding the rest. In an era when a significant proportion of this information came in the form of advertiser messaging, consumers acted on those messages that seemed to fit their agenda. And when they did, it seemed as though the advertising had been 'effective' in influencing them.

But this 'effectiveness' didn't lie in the power of the message. It lay in whether consumers thought it worthwhile picking it up and using it. In other words, the consumer always was in control. The real driver wasn't messaging. It was the consumer's search for value. And today, as we move towards an environment of 'what I want, when I want it' information access, this fact is simply being dredged from obscurity and placed in the light of day for all to see.

3) Marketing success does not equal improved sales and profits

Marketers are employed by individual organisations to improve the go-to- market performance of those particular organisations.

Sorry if you think this is a statement of the obvious, but it is important. It means, for example, that marketers are *not* employed by consumers to improve consumers' go-to-market performance.

In fact, the two parties have very different goals and priorities when going to market. Selling organisations want to find and keep profitable customers. For them, marketing success does indeed equal improved sales and profits. But these metrics of 'marketing success' have little meaning for consumers, for whom the search for best value from the marketplace – including exercising choice among competing suppliers – is paramount.

Traditional metrics of marketing success are meaningless to consumers.

So what would the metrics of go-to-market success look like if seen from the consumer's rather than the organisation's point of view?

This is not a rhetorical question. It actually lies at the heart of the reinvention of marketing, because marketing now needs to reorganise itself – and recalibrate itself – around the consumer's metrics of success.

Why? **B**ecause in a world where selling organisations controlled the flows of information and the content of those flows, sellers controlled the main go-to-market processes (even if their ability to control consumer attitudes and behaviours was limited).

However, as we move towards an environment where consumers can demand "content delivered when they want it, how they want it, and very much as they want it" the consumer is in the driving seat. This is becoming increasingly apparent with the emergence of Added Value Buying Services which help consumers search for, sift, analyse and compare the information they need to make better, more informed purchasing decisions. (For more on this, see the White Paper on Added Value Buying Services at www.rightsideup.net).

We have reached a tipping point in the evolution of marketing.

- Yesterday, the processes, purposes and measures of marketing were organised around the seller's search for customers.
- Tomorrow, the processes, purposes and measures of marketing will be organised around the buyer's search for value.

A terrifying prospect?

Consumers don't like marketing and would like to avoid it or block most of it, if they could. And increasingly, they can.

Marketers' quest to control the go-to-market process is failing. Control is slipping through their fingers.

Go-to-market practices and processes are being reorganised around the consumer's rather than then organisations goals and priorities.

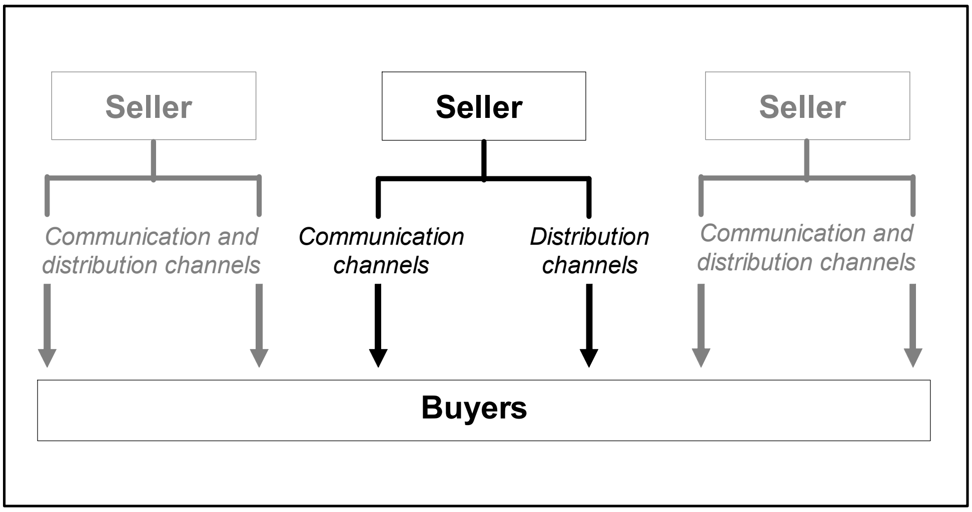
No wonder marketers do not want to reinvent marketing! How on earth are they expected to perform successfully in such an environment? Better to hang on to, and shore up, the old ways for as long as possible!

These are natural reactions, perhaps. But they are misguided. In fact, the new environment promises a new 'golden era' with new win-wins, new opportunities and new efficiencies. Let's see how and why.

Critical components of future marketing

To see these new win-wins we need to step outside of the current assumption that marketing is a corporate activity and address the bigger picture: what is the best way for the economy as a whole to organise its processes of matching and connecting? Is the current way the *only* way?

The chart below sums up the main characteristics of our current go-to-market ecosystem. The process is organised by sellers and revolves around sellers' goals and objectives. Sellers focus on achieving the best – most efficient, effective – means of reaching and influencing consumers. And, to date, the best way to do this has been via media advertising and retail distribution – thus creating an ecosystem with four pivotal players: sellers themselves, buyers, retailers and media owners.



The old go-to-market environment, organised around sellers' quest to influence buyers

With the transformation of the information and communication environment, however, all of these contributing parties and relationshps will be revisited. The three most crucial developments are:

- Added Value Buying Services
- the evolution of brands into a new role of 'information service'
- the rise and rise of lean operations

Let's briefly look at these emerging trends.

<u>Added value buying services</u> These are a new form of consumer service that help individuals go-to-market better, smarter and easier by providing them with trustworthy, impartial, comprehensive, easy to access and use information about what is available on the market, pitfalls and opportunities to look out for, etc.

Added Value Buying Services:

- helping shoppers **clarify and articulate** needs and wants (via an iterative process of seeing what is available, what the advantages and disadvantages are, searching for and considering more options etc)
- help individuals **search** for information about the items they want to buy, including key decision-influencing considerations such as price, functionality, quality, availability etc.
- **compare** different options: price comparison, product reviews, peer-to-peer ratings etc
- provide consumers with comprehensive impartial **advice**, to help guide consumers towards the best choice for their circumstances and priorities
- **negotiate** better deals


Reinventing Shopping

Added Value Buying Services
A manifesto for a new market

See the White Paper on AVBS at www.rightsideup.net

As these services mature, they will become the first port of call for shoppers when going to market and the most important influence on their purchasing decisions.

Added Value Buying Services transform the go-to-market environment in a number of ways. They are set to become a key channel to market for consumers, and therefore also a pivotal means for sellers to reach and influence potential buyers. They also change the nature of this influencing process – organising it around the buyer-centric agenda of 'best value from the marketplace' rather than the seller-centric agenda of 'buy my brand!'. At the same time, they elicit large amounts of rich, accurate, up-to-date information about who wants to buy what, when - a critical development, which we return to below.

Brands as information services As we've seen, historically marketers could assume that in paying a media owner for air time or space, they were effectively buying consumers' attention.

As information services, brands can offer users content worth searching for, referring others to and talking about

But in a search rather than pull information that assumption no longer holds water. Brands therefore need to reinvent themselves as 'information services' providing consumers with information worth searching for, referring others to, and talking about. Their role as 'buy me!' messages will remain, of course (see Addendum). But increasingly, messaging will only be effective as a natural, integral element of the broader function of information service.

So what does a brand as an information service offer? The whole gamut of potential customer information needs including:

- information that helps the consumer address the underlying problem (e.g. information about how to move house, as well as information about mortgage offers)
- information about product-related problems and issues: how best to use the product, how to solve problems relating to the product
- detailed, technical information about the attributes and uses of the product or service itself
- information that addresses broader consumer concerns about health and safety, environmental impact, human rights etc.
- infrastructure and services that help consumers interact, chat, share ideas and views with and learn from people with similar interests and concerns
- content that is fun and entertaining – worth consuming in their own right and gossiping about with friends
- brand communications that can be used as 'tools' for personal expression including posturing and posing
- 'information that helps the consumer search for and buy the right product or service for his or her needs

Brands as information services are the anti-dote to marketing schizophrenia. They require companies to focus as hard and as carefully on their customers' information and advice needs as their product or consumption needs; to make their marketing, as well as their products, 'worth buying'.

Lean operations At first sight, an operational issue such as lean has got little do with the reinvention of marketing. In fact, it is crucial.

The mass production, economies-of-scale oriented production company generates a need for push marketing. It can only maintain its virtuous spiral of increased sales, increased economies of scale and reduced unit costs if it can continue to persuade consumers to buy its products. The mass production company therefore ends up organising its production around volume targets – rather than actual demand – and throwing sales targets 'over the wall' at marketers, who then try to 'push' consumers into buying their products.

Mass production creates 'push' marketing

Lean is an entirely different value philosophy. A central principle of lean, for example, is that making too much – producing to sales or volume targets rather than to actual demand – is positively wasteful. For example, it ties resources up in un-needed and unwanted inventory while generating the need for 'clearance' price reductions and expensive marketing programmes aimed at persuading consumers to buy things they don't particularly want to buy.

So lean producers seek operational flexibility to enable them to produce exactly in line with demand. While mass producers try organise the market around the dictates of their internal efficiency considerations, lean producers seek to organise their supply operations efficiently around the dictates of the market.

The lean philosophy of value is also very different. Lean starts with a *customer* definition of value: anything that adds value for the customer is worth doing, and anything else is waste. Mass production companies on the other hand operate to a *corporate* definition of value: a financial target. This financial perspective offers no way of distinguishing between what loyalty guru Fred Reichheld calls ‘good’ versus ‘bad’ profits.

Firms make ‘good profits’ by delivering customers superior value. They make ‘bad profits’ by extracting value from customers: by taking advantage of their relative ignorance about costs, ingredients or processes, for example; by building ‘barriers to exit’ and exploiting their inertia; by blinding them with science, overwhelming them with dull and confusing small print which makes genuine value comparisons all but impossible, and so on.

When marketing’s key metric of success is improved corporate profitability, it often ends up chasing after bad profits as much as good. Numerous examples of mis-selling in the financial services industry are a case in point.

Please note: Lean applies as much to service as it does to manufacturing. Instead of infruriating customers with call queuing systems in call centres for example, lean operators try to discover the ‘root cause’ for the customer’s call and to solve the problem that caused the call – for ever. This lean philosophy that ‘no service is (often) the best service’ (because it is no longer needed) improves customer satisfaction while slashing service costs. (For more on lean, go to the Lean Enterprise Academy at www.leanuk.org)

Pioneering new value

So it is no accident that lean producers such as Toyota are beating their traditional mass production competitors hands down. (Toyota can produce a better quality car using nearly half the man hours of its ‘batch-and-queue’ economies-of-scale driven competitors).

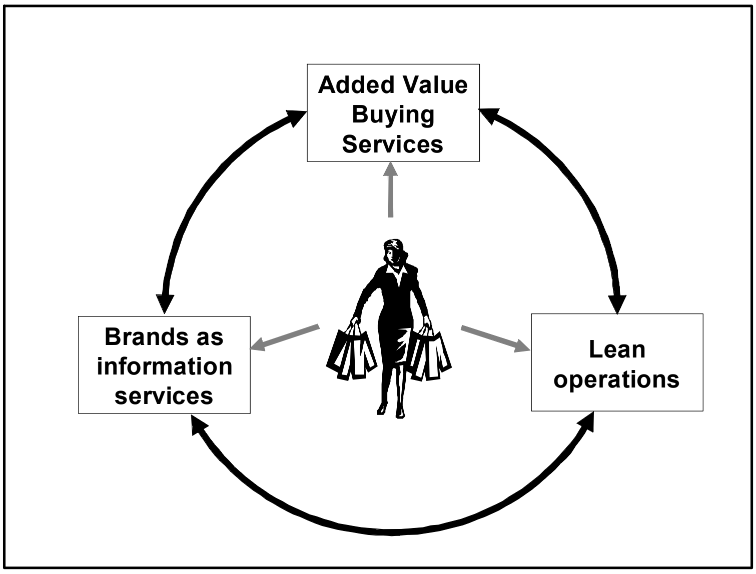
But the central message is this. Lean organisations that are continually improving their value offering, and that can respond quickly to what the market are much better suited to an environment where consumer ‘pull’ processes are increasingly taking precedence over producer ‘push’, and where buyer-centric information increasingly takes precedence over seller-centric messaging.

A new go-to-market ecosystem

With these three ingredients in mind – added value buying services, brands as information service, and lean operations and service – we can now begin to see what the new marketing ecosystem will look like.

At the centre lies the consumer and his search for best value (rather than sellers and their search for customers). Consumers frequent Added Value Buying Services and brands as information services in their search for the information that will help them find best value (where value includes easy access and convenience as well as price).

Brands as information services supply AVBS with content, and AVBS point consumers towards best value providers who are, increasingly, lean providers. 'Good' brands – that is, brands which excel at making good profits rather than bad profits – flourish in this environment as, increasingly, the market comes 'knocking on their door'.



A new go-to-market ecosystem built around the consumer's search for value

Please note: the seller and the buyer are still pivotal entities in this new ecosystem. But the media owner (i.e. the distributor of news and entertainment) and retailer are not. That doesn't mean they will disappear. Media owners will continue in their role as content producers and distributors, but their umbilical link with advertising will be much reduced. Like marketers they will also need to reinvent their business models.

Likewise, retailers will maintain their role as distributors, or access points, for goods and services. But their stranglehold on commerce as the pivotal middleman between producer and consumer will be broken – to be replaced by the AVBS and direct dealings between customers and companies. Retailers too, will have to reinvent themselves.

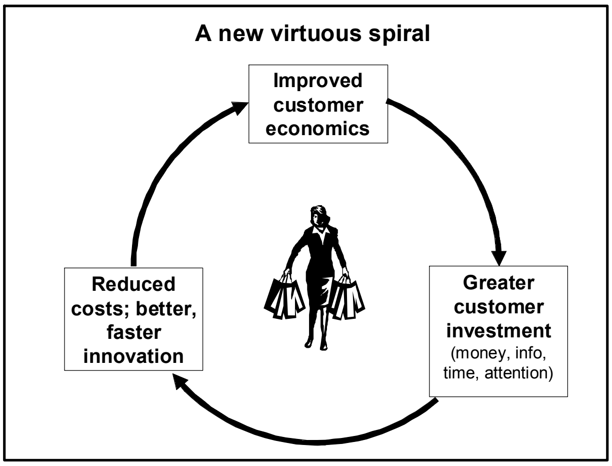
The seller and buyer are still pivotal entities of this new ecosystem. But the media owner and retailer are not

New win-wins

We started out by paying homage to marketing's golden promise – its central role in efficient matching and connecting. With the new ecosystem that central role remains exactly the same. What has changed is the *how*.

We also highlighted the win-wins that lay at the heart of the old marketing system: marketers herded buyers to products, which generated demand, which in turn let producers invest in productive capacity and economies of scale, which reduced unit costs, which delivered better value to the consumer, thereby generating even more demand.

This was a win-win, but it was a *seller/producer-centric* win-win. It was organised around improving the economics of the producer: if the producer's economics were improved then he was in a position to pass back some of the benefits in terms of lower prices and/or improved quality and innovation.



The new ecosystem will also generate its own virtuous spiral, except that this time the win-wins are *buyer/consumer*-centric. They revolve around the consumer's search for value: improving the economics of the individual. If the economics of the individual are improved, then he or she is in a position to pass back some of the benefits to sellers, not only in the form of more money but also the investment of information, time, attention, emotional engagement and so on.

How will this win-win work?

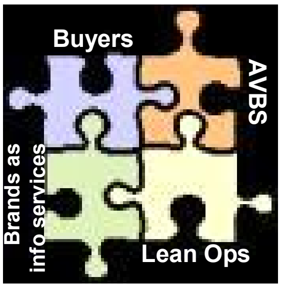
First, Added Value Buying Services not only provide consumers with the information they want to shop better and easier. As we've seen, they also elicit volunteered, accurate, up-to-date information from buyers about who wants what, when. This means AVBS will provide sellers with the opportunity to talk to the right people about the right things at the right times – thereby helping them massively reduce the huge amounts of waste and duplicated effort currently involved in traditional media advertising and junk mailing and to reduce their go-to-market costs.

They also help sellers innovate better and faster because, in the process of eliciting messages of demand from consumers, they also help to identify what consumers would like to buy but can't, and why they are not currently buying particular offerings.

Brands as information services meanwhile bring two further benefits to the party. First, by building their role as trusted sought-after sources of information, they also reduce sellers' dependence on expensive, wasteful mass advertising, junk mail etc. Instead of having to go in search of consumers, consumers now come looking for them. As with AVBS, this helps them reduce their go-to-market costs.

At the same time, brands as information services add a new level of value to the brand. Before, only the product delivered value to the consumer. Now value comes in two forms – the product and related information services. And much of the information content of these new services is simple repurposed internal knowledge and expertise: new value for the consumer at very little extra cost for the supplier. This points to increased sales, market share and perhaps even margins.

Lean operations (both manufacturing and services, including logistics) meanwhile help providers reduce operational costs and offer better quality – thereby earning the recommendations of AVBS – and attracting interest and demand from buyers. Meanwhile, the flexible nature of lean operations means the company is more able to respond to changing consumer 'pull' and not under pressure to resort to old-fashioned push tactics.



The emerging ecosystem

Separately, each one of these developments – AVBS, brands as information services and lean – has a contribution to make. Together they come together to form a coherent, win-win ecosystem with its own inbuilt virtuous spiral.

Managing the migration

The future of marketing and shopping looks different to what we see today, but this evolution is only just beginning. Rupert Murdoch may be predicting a 'what I want, when I want it, how I want' future of media and information access – and he's almost certainly right. But right now, most of these services are only just being launched, remain pretty clunky, are attracting only small numbers of 'early adopters', and so on.

We see where we are headed, in other words. But it is a long road ahead of us.

Does that mean marketers dare ignore it? No! Those who ignore it risk missing the boat altogether.

On the other hand, going too far, too fast is equally dangerous. New infrastructure still needs to bed down. New Added Value Buying Service business models still need to mature and gain critical mass. Consumers still need to change their habits and attitudes. And all these things will take time. So the real conclusion is … experiment!

The old marketing system is not going to die on its feet this year, next year, or even ten year's time. It still has to be managed.

The challenge is to do this *while also* getting to grips with new approaches as they emerge along side it.

So marketers need to allocate a certain (and growing) proportion of time, effort and resources to explore these new possibilities. To what degree will the trends highlighted in this Paper apply to our particular product/service category? (The effects on chewing gum, mortgages, motor and plumbing services could be very different, for example) How far will these trends go? And how fast? Which customer segments will be the first to change? Which customer segments will be decisive in tipping the balance? What are these different groups looking for?

What does it take to build a brand as an information service? What sorts of information do our particular customers really value? How do they want to access it? In what form? When?

Likewise, what forms of Added Value Buying Service are emerging in our category/industry? How influential are they now, and how fast is this influence growing? What are the best ways of working with them for mutual benefit? Which ones are best to work with?

This is a steep learning curve for all concerned. Those who climb it furthest and fastest have the most to gain.

Finally, how can we get started on the long journey towards lean? And how can we apply lean principles not only to core operations but customer service and marketing itself?

There is enough here to be kept very busy for years to come. And getting the balance right will be crucial. An ongoing programme of many, small, low-risk experiments is needed to test the water, learn, and find out what works.

This is a steep learning curve for all concerned. Those who climb it furthest and fastest have the most to gain.

Addendum

Advertising and media: the end of an affair?

You may conclude from reading this White Paper that it is predicting the death of traditional media advertising. It is not. That outcome is highly unlikely.

However, media advertising is losing its central role in the matching and connecting process.

The current advertising set-up is energised by a hugely powerful 'win-win-win' between consumers, sellers and media owners: consumers get valued news and entertainment free or highly subsidised by advertising, advertisers get their audiences, and media owners have a rich revenue stream.

These win-wins may be threatened or bypassed by an ad-avoiding 'pull' information environment. But they are not completely undermined. Many consumer will continue to think it good value to 'pay' for content with their attention.

So how does the attention-for-content trade at the heart of modern square with a new ecosystem populated by added value buying services and brands as information services? Answer: via a new mix and interplay of four factors.

1) A migration away from media advertising. The biggest candidate for such a migration is classified advertising. Its highly specific, detailed and time sensitive nature lends itself to an online, search environment. Also, AVBS themselves will attract a growing proportion of marketing budgets in the form of both search-related advertising and display.
2) The maintenance of media advertising. Even though messaging is a service to the seller and not the buyer, media advertising still generates a number of content-related win-wins:
   - 'on the plate' information. Search may put the searcher in control and guarantee much greater relevance, but it's also harder work than sitting back and having information thrown at you. To the degree that consumers don't mind, or like, having information thrown at them, old-fashioned push advertising will remain a force
   - This is more likely to succeed if it also serves a consumer purpose. These purposes include:
     i. Being made away of 'new news' such as new product launches and special offers

   ii. Serendipitous information that just happens to catch the consumer's eye
   iii. 'badging', where what the brand 'says about me' to others is an important element of value
- Finally, there is an inherent 'win-win' in brand fame itself. Fame breeds familiarity, and familiarity delivers reassurance. The seller benefits: given a choice between the familiar and the unfamiliar, people tend to opt for the familiar. But the buyer also benefits. The fact that the advertiser has stuck his neck out in public means he is putting his reputation on the line, so the risk of buying is reduced.

3) Accommodation with new 'channels'. Advertisers will meanwhile adjust the content and distribution of their advertising to an increasingly buyer-centric, pull information environment. For example:
   - while continuing to buy fame via mass media they may tweak its content to say 'find out more' from the brand's various information service outlets, or even from AVBS who happen to be recommending their products.
   - As media audiences fragment with ever more specialised programming, it's possible to make advertising far more relevant: advertising becomes 'a support service' to coalescing communities of interest.
4) Re-inventing old models. Advertisers will extend and reapply the 'attention for content' model in new ways, e.g.:
   - 'free' software and internet applications funded by advertising
   - a complete inversion, with consumers being paid for receiving advertising from specific suppliers in the currency of media programs (see pureprofiles.co.uk, for example)
   - the attention-for-content model being disaggregated from mass audiences for broadcast programs to individuals for specific programs.

With a combination of all these different trends advertising will continue to find a role, even within an increasingly buyer-centric environment where the main and first-port-of-call for consumers going to market is the added value buying service.