

EFFECTS AND FUTURE OF THE INTERNET ON THE MALAYSIAN ADVERTISING INDUSTRY

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ABSTRACT

The Internet is having a major effect around the world on how businesses are being run, with changes in relation to marketing communications, customers, media selection, and dealing with advertising agencies. What has been the effect of this new media, and what changes are perceived for business in the future? This paper will examine Malaysian advertising executives' views on the effects of the Internet on business communications, and seeks predictions on the future of the advertising industry. A survey of 51 advertising executives indicated that the Internet will not entirely replace traditional mass media for advertising use, although it will have some effect on media planning.

Keywords: Advertising; Malaysia; Internet; Advertising industry; Communication.

I. INTRODUCTION

The advertising industry worldwide is facing a changing media landscape. This new media landscape draws its roots from both advances in technology and fragmentation of traditional media markets (Kassaye, 1997). Unlike traditional advertising, which is a non-interactive message to mass audience, the new media platforms are allowing an interactive approach where the consumer has an active role in the management of information provided by the advertiser (Hoffman and Novak, 1994; Bezjian-Avery 1998). The impact of the World Wide Web on business has been significant, effecting how companies market their product with advertising (Kassaye 1997; Dholakia and Rego 1998; Hoey 1998; Hofacker and Murphy 1998; Yuan, *et al.*, 1998), new customers (Kangis and Rankin 1996; Raman and Leckenby 1998), and retailing (O'Keefe, *et al.*, 1998; Sahay, *et al.*, 1998). Through technological advances and increasing usage by the general public, the Internet is spearheading these changes (Hoffman and Novak, 1994).

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The use of the Internet by business worldwide is growing extremely rapidly, including in non-western countries. In Malaysia, which has a highly regulated media industry, the Internet has become a popular form of communication (Minges and Gray 2002). This is partly due because for the first time the government of Malaysia is incapable of restricting this medium, and the Malaysian Government's desire to become an international player in cyberspace (Waller and Fam 2000; Minges and Gray 2002). It was estimated that there were over 11 million Internet users as of Sept/2006, which was 38.9% of the population (CIA 2007). The effect of the Internet on business and advertising is currently unclear, especially in a country like Malaysia, which has its own distinct languages, cultures, norms, regulations and business environment which are very different from the West (Deng, *et al.*, 1994; Fam, *et al.*, 2004). Malaysia has a population of over 24.3 million people, with three main ethnic groups (Malay, Chinese and Indian), a mixture of languages (Malay is the official language with various Chinese dialects - Cantonese, Hakka, Hokkien and Mandarin - and English also being spoken) and a number of religions being practiced (Islam, Buddhist, Taoism, Hinduism and Christianity) (CIA 2007). These factors have been seen as major areas of concern for marketers entering this market (Shao and Waller 1993), and, with the popularity of the Internet, will raise issues relating to the future of advertising and media planning in that country (Minges and Gray 2002).

This study aims to examine the Malaysian advertising industry's views on the Internet, and to answer two research objectives: (1) to discover the perceived effects of the Internet on business communications, and (2) to seek predictions for changes to the advertising industry in the future. To answer these objectives, a survey of 51 advertising executives was undertaken at an industry conference. It is believed that the respondents would have an intimate knowledge of the current state of the advertising industry in Malaysia, as well as valuable views on its future. The results present a unique view of the future of the Internet and the advertising industry in Malaysia.

II. ADVERTISING AND THE INTERNET

The Internet boom in recent years has drawn much attention from both the academics and practitioners worldwide (Bezjian-Avery 1998). With its global reach, low set up cost and interactive capability, the Internet has revolutionised the way businesses trade and communicate (Ligos, 1999). Some of the ways the Internet can be used by businesses to promote its product include websites, banner ads, floating ads, pop-ups/pop-unders, links, and e-mail. The ease of use and ability to carry sound and display pictures has made the Web a natural venue for advertising, as well as its real-time interactive capability (Cho, 1999). The result is a general change in consumer's media consumption, which has effected the role of the traditional advertising agency.

Advertising agencies are facing a number of critical issues involved with this changing media landscape. Advertisers are demanding special attention to the media planning process to determine how to use their advertising budget more effectively to best reach their target audience (Helgesen, 1997; Keane and Fam, 2005). Fragmentation of traditional media markets and the inclusion of new media into the media planning equation have resulted in an extremely complex media-planning environment. As a result, advertising agencies are acknowledging the increased importance of media planning in an effective campaign. They are separating media planning and campaign strategies to acknowledge the importance of media strategies as a crucial process to the success of a campaign (Anon, 1998a). This has seen the beginning of

advertising agency “unbundling” its services into separate entities so that at each stage of an advertising campaign can have total attention (Anon, 1998b). This has led to the creation of dependent and independent media specialists.

The development of media specialists has transformed the advertising account planning process with media planning now often discussed before the creative process, and most creative advertising specialists understand that it is important that media works in harmony with the creative idea (Anon, 1998b). However, as the media market grows increasingly more complex, most advertisers are becoming more reliant on the expert assistance of media independents (Helgesen, 1997). According to Hume (1999), media-only shops extend the lure of smarter buys and better cost-efficiency because of their specialisation, and that nearly half of all the large advertising account shifts of 1998 was to media-only shops.

McDonald (1999) interviewed a number of advertising agency executives and found that the Internet/email was perceived to be the main type of media that will see the largest increase in utilisation over the next three years. These advertising executives believed that the Internet's practical uses grow each day and it also allows for more creative and targeted advertising. They also perceived the Internet to be extremely flexible, economical, environment friendly and are growing at an alarming rate. This study revealed that advertisers' perceptions of the Internet as a communications tool were mainly positive, but there was a feeling that they were being pressured to “jump on the bandwagon” (McDonald 1999).

As a result on this pressure to be on-line, many advertisers/companies rushed to set up their web sites without real understanding of its applications and the proper ways to explore the market opportunities in the cyber space (Evans and King, 1999; Rossiter and Bellman, 1999). These advertisers frequently turn to their in-house department, or public relations agencies, or computer graphic boutiques, instead of the traditional advertising agencies for the development of their web sites (Kassaye, 1997). The consequence of this action is that advertising agencies are being forced to compete with these organisations for Web related advertising accounts. This in turn has raised questions about the viability of Web related accounts for advertising agencies.

The arrival of the Internet has also begun to alter the agency-client relationships and to blur the functions performed by each. Traditionally, the challenge agency faces is limited to the blurring of programming content and promotional messages (Sandler and Secunda, 1993). The challenge now is the blurring of Web-related activities and functions performed by advertising agencies, public relations firms, computer graphic boutiques and even the advertisers themselves (Kassaye, 1997).

With the push for greater accountability and the claim that the new entrants can produce Web advertisements more economically, the position of agencies is likely to deteriorate further. According to Kassaye (1997), advertising agencies are under strong pressure to show direct relationships between advertising efforts and sales, while sponsors are asking for better justifications and not simply agreeing to more advertising dollars.

The Internet is getting easier to use and has become a huge resource for information and entertainment, and a battlefield for the traditional advertising agencies (Bezjian-Avery 1998). Despite the huge potential of the Internet and the looming conflict, there is little information

from the advertising industry. This study attempts to contribute to the literature by examining the Malaysian advertising industry's perceptions of the effect of the Internet and its perceived changes to business communications in the future.

III. METHODOLOGY

To determine the perceptions of Malaysian advertising executives towards the effects and future of the Internet, a personal survey was undertaken. The questionnaire was distributed to a gathering of approximately 120 media professionals at an industry conference. As it was a large industry conference it can be assumed that the responses, while they may not be generalisable to the larger population of the Malaysian advertising industry, could be a good reflection of the views of Malaysian media professionals. Delegates were informed about the study, presented with a copy of the questionnaire and they were given time to voluntarily complete it. The questions were asked in such a way as to make responses easy to write and allow for clear statistical assessment to be performed. A profile of the respondents is found in Table 1.

A total of 51 media professionals were sampled (24 male and 27 female). The age of the respondents indicates that those involved in media planning was relatively young with the majority aged 26-30, followed by 31-35, years old. As the ages indicated relatively young respondents, this is reflected in the small number of years employed in the organisation, with 73% being with the organisation for between 1-5 years. Most were employed in the research department of their organisation (24 or 47%), followed by equal numbers from account and media services (11 or 22%).

As for the type of organisation the respondent is from, the majority were from publishing companies (26 or 51%), while one third were from advertising agencies. More than half were from large companies, as 59% had over 100 staff members and 25% had less than 50 staff. Most had billings of less than RM100 million (Malaysian ringgit 3.80 = US\$1), while a third had between RM100-499 million. There was an almost equal numbers that were owned or affiliated with an international organisation (21 or 41%), compared to those with no such affiliation (30 or 59%).

The main questions were in the form of a Likert-type scale where a number of statements were presented to the respondents on a Likert-type 7-point scale whereby 1=Strongly disagree; 4=Neither Agree or Disagree; 7= Strongly agree). The statements were chosen after reviewing the literature to determine some current issues and in discussion with a media planning executive, and were divided into two sections to analyse the effects of the Internet on business communications and to give predictions on the future.

IV. RESULTS

Effects of the Internet

The overall results indicate that respondents did not perceive that the Internet will pose a significant threat to the existing structure of the industry. The statements have been ranked in order from the one with the most agreement to the one with the most disagreement (see Table 2).

Table 1: Demographics

RESPONDENT:		
Gender	Male	24 (47%)
	Female	27 (53%)
Age	20-25	2 (4%)
	26-30	20 (39%)
	31-35	13 (25%)
	36-40	6 (12%)
	41-45	9 (18%)
	46+	1 (2%)
Years in Organisation	1-5	37 (73%)
	6-10	9 (17%)
	11-15	4 (8%)
	16-20	1 (2%)
Department	Research	24 (47%)
	Account Services	11 (22%)
	Media	11 (22%)
	Owner/Advertiser	5 (9%)
ORGANISATION:		
Type of Organisation	Advertising Agency	17 (33%)
	Publishing House	26 (51%)
	Media Buying Shop	4 (8%)
	Advertiser	4 (8%)
Staff	1-50	13 (25%)
	51-100	8 (16%)
	101+	30 (59%)
Billing (RM 3.80 = US\$1)	Less than RM100m	27 (53%)
	RM100-499m	17 (33%)
	RM500m+	7 (14%)
Owned/Affiliated with International Ad/Media Organisation	Yes	21 (41%)
	No	30 (59%)

The results indicate that almost two-thirds (64.7%) of the respondents believe that the Internet will never replace the traditional mass media like television and newspapers, and most do not think that the Internet will see businesses move away from using advertising agencies. These are sobering findings considering the amount of media space and hype given to saying how the Internet will one day replace more traditional mediums.

Other findings include that the Internet would effect how a company plans its media strategy, and its client-agency relationships. However, these opinions were speculative given that a large number of respondents felt that there is still insufficient information available about the possible influence of the Internet on business communications. This finding supports Bush and Bush (2000) who investigated the possible influence of Internet's impact on client-agency relationships. On another issue, almost half the respondents felt that the Internet will always have a limited reach in Malaysia, although most disagreed with the notion that the Internet would not be accepted in the country. The statements that did not receive definite feelings of agreement or disagreement (close to the midpoint 4) related to the Internet's current role in a company's media planning. This shows that it cannot be said that overall the Internet has affected Malaysian businesses' media planning or become an integral part of their media plans.

Table 2: Effects of the Internet

	Sample Mean N = 51	Std Deviation	% of respondents who agreed with the statement (scored > 5)
Internet will never replace television or newspapers	5.1	1.7	64.7
Internet will effect how company plans their media strategy in the future	4.8	1.4	49.1
There is insufficient information about the internet to know how it will effect business in the future	4.8	1.3	58.8
Internet will effect how agencies relate to their clients in the future	4.4	1.5	51.1
Internet will always have limited reach	4.4	1.7	49.0
Internet has already effected businesses' media planning	4.0	1.5	37.3
Internet is already an integral part of a business's media plan	3.9	1.4	33.3
Other new media will have more of an effect than the internet	3.7	1.4	21.6
Internet is a fad for businesses	3.6	1.7	23.6
Internet will not be accepted by most people in my country	3.5	1.3	21.5
Internet will see businesses moving away from advertising agencies	3.2	1.5	21.6

Scale: 1 = strongly disagree, 4 = neither agree or disagree, 7 = strongly agree.

Table 3: Effects of the Internet on Business Communications by Position in the Organisation

	Account Service Mean N = 11	Media Planning Mean N = 11	Research/ Sales Staff Mean N = 24	Advertiser /Owner Mean N = 5	F-value * 0.05 ** 0.01
Internet will never replace television or newspapers	4.6 (2.2)	5.5 (1.4)	5.2 (1.5)	4.6 (2.0)	0.68
Internet will effect how company plans their media strategy in the future	5.1 (1.8)	4.6 (1.7)	5.0 (1.2)	4.0 (0.7)	0.81
There is insufficient information about the internet to know how it will effect business in the future	4.6 (1.7)	4.4 (1.2)	5.3 (1.1)	3.8 (1.3)	2.51*
Internet will effect how agencies relate to their clients in the future	4.8 (1.6)	3.6 (1.5)	4.8 (1.2)	3.0 (1.4)	3.70**
Internet will always have limited reach	4.4 (2.2)	4.3 (1.6)	4.5 (1.7)	4.2 (0.8)	0.09
Internet has already effected businesses' media planning	4.6 (1.6)	3.8 (1.4)	4.2 (1.3)	2.6 (0.7)	2.23*
Internet is already an integral part of a business's media plan	4.4 (1.7)	4.2 (1.5)	3.8 (1.0)	2.6 (1.8)	2.08*
Other new media will have more of an effect than the internet	4.5 (1.2)	3.5 (1.6)	3.8 (1.2)	2.2 (0.8)	3.64**
Internet is a fad for businesses	3.7 (2.0)	3.6 (1.7)	3.8 (1.7)	2.2 (1.3)	1.19
Internet will not be accepted by most people in my country	3.4 (1.4)	3.4 (1.4)	3.8 (1.3)	2.6 (0.9)	1.12
Internet will see businesses moving away from advertising agencies	2.8 (1.8)	2.5 (1.4)	3.6 (1.1)	3.4 (1.9)	1.61

Scale: 1 = strongly disagree, 4 = neither agree or disagree, 7 = strongly agree; (Standard Deviation is in parenthesis).

Within organisations in the advertising industry there are particular departments, or divisions, that undertake specific services, such as account services, and media planning. People in these departments have a different experience of the advertising process, and may have different views of the Internet and its effect on the advertising industry. To determine if there were any statistical differences in responses, the respondents were grouped into four main categories (account

services, media planning, research/sales, and advertiser/owner) and an ANOVA was run. The results of the F-value are presented in Table 3. There were two statements that resulted in statistically significant different responses. Firstly, the 'Account Service' and 'Research/Sales Staff' were more concerned about the effect of Internet on how agencies relate to their clients than media planners or advertisers. Secondly, the Account Service thought that other media will have more of an effect than the Internet, than the other groups, particularly compared to advertisers/owners. Interestingly, Research/Sales Staff felt most strongly that there is not enough information available about the Internet to know how it will affect business in the future, although their response was not significantly different from the other groups. This answers research objective 1.

Changes to the Advertising Industry

In Table 4, the majority (54.9%) of respondents agreed that future creative work will be done on computer by clients using specialised graphics software. There tended to be agreement with the idea that advertising regulations will be weakened in the future, however, with a mean score only just above the midpoint score (4.2) it is not a strongly felt belief. Stronger beliefs were indicated when disagreeing with the notions that traditional agencies will disappear, local agencies will lose business to large, global agencies, and agencies will be smaller in the future.

Table 4: Changes Perceived by the Advertising Industry

	Sample Mean N = 51	Std Deviation	% of respondents who agreed with the statement (scored > 5)
Creative work will be done on computer by clients using specialised graphics software	4.5	1.7	54.9
Advertising regulations will be weakened	4.2	1.6	45.1
Account management duties will be undertaken by the media department	3.9	1.4	31.3
The traditional type of advertising agency will disappear	3.6	1.7	23.5
Local agencies will lose business to large, global agencies	3.5	1.7	29.5
Ad agencies will be smaller in the future	3.4	1.6	23.6

Scale: 1 = strongly disagree, 4 = neither agree or disagree, 7 = strongly agree.

Comparing the different groups, again, there were two statements that resulted in statistically significant differences (see Table 5). Research/Sales Staff and advertisers/owners felt that creative work will be done by clients using specialised graphics software in the future. The research/sales staff tended to see local agencies losing their business to large global agencies, while account services and advertiser/owners more strongly disagreed with this view. Another point of note, which was not statistically different among the groups, was that

Table 5: Changes Perceived by the Media Industry by Position in the Organisation

	Account Service Mean N = 11	Media Planning Mean N = 11	Research/ Sales Staff Mean N = 2 4	Advertiser /Owner Mean N = 5	F-value * 0.05 ** 0.01
Creative work will be done on computer by clients using specialised graphics software	3.7 (2.2)	3.6 (1.5)	5.1 (1.4)	5.0 (1.0)	3.22**
Advertising regulations will be weakened	3.7 (2.1)	4.2 (1.7)	4.2 (1.3)	5.2 (1.8)	0.93
Account management duties will be undertaken by the media department	3.1 (1.8)	4.0 (1.0)	4.2 (1.3)	4.2 (1.1)	1.79
The traditional type of advertising agency will disappear	3.4 (2.1)	3.1 (1.4)	3.8 (1.6)	4.0 (2.3)	0.56
Local agencies will lose business to large, global agencies	2.6 (1.7)	3.2 (1.6)	4.2 (1.6)	2.6 (0.9)	3.22**
Ad agencies will be smaller in the future	2.8 (1.8)	3.0 (1.5)	3.7 (1.7)	4.2 (0.4)	1.34

Scale: 1 = strongly disagree, 4 = neither agree or disagree, 7 = strongly agree; (Standard Deviation is in parenthesis).

advertisers/owners felt that advertising regulations will weaken, the traditional type of advertising agency will disappear and agencies will become smaller in the future. This answers research objective 2.

Open-Ended Responses

The respondents were also given an opportunity to say, in their own words, what they thought of the effects of the Internet on the advertising industry, and what other media they thought will play an important role in the future. In general, most felt that the Internet was just another media to include in a company's media mix, and the importance for media advertising executives was to incorporate the Internet into an integrated strategy. Some saw it as a major medium: *"Will have a very big impact especially for MNC's/Global products"*, *"All the media planners have to go back to school to learn all about the Internet"* and *"Internet could not be ignored. It will become an integral part of planning"*. While others felt that the Internet is a medium which should be integrated with other media: *"Generally, brand communication still requires traditional mass media"*, *"it will complement TV and newspaper"*, *"It is only one of the medium in media planning – have to consider an integrated appeal"*, *"It will be included in the media planning although not necessarily an integral one"*, *"The Internet will*

still be another average player in the industry”, “It will create a great ‘media mix’ for planners to incorporate into their media plans. Also it allows niche/focus targeting”, and “Internet is good tool to use. However, the Internet should be used as a supplement tool, as the existing media are still necessary and important”.

Some concern was made of the Internet’s effect on the marketplace, namely with market fragmentation and niche targeting. The respondents concern include: *“Fragments the media scene but will only bring greater impact on the younger target”, “As market is becoming more fragmented, Internet will feature strongly for effective micro-target campaigns” and “more media means more choices”.* According to one executive: *“The challenge is to harmonise niche and mass media effectively”.*

One executive did point out a strategic advantage of including the Internet into media plans by advertising agencies: *“The advertiser must be told first of possible use of the Internet: to strengthen belief in ad agency. If advertiser not told/offered then they are likely to turn to competent experts. Agencies are viewed as incompetent in this issue. (Agencies must) offer Internet as part of integrated marketing strategy”.*

As for other forms of media that will play a major role in the future, there were a variety of responses. Some of these included: “loyalty programs”, “electronic newspapers/magazines”, a few suggested “cellphone advertising”, while a number recognised the developments in television technology, saying Web TV, Cable TV, Digital TV, as one said *“Anything that is digitised”.*

V. CONCLUSION

This study observed Malaysian advertising executives' attitudes towards the effect of the Internet on business communications and predictions for the advertising industry in the future. A total of 51 advertising executives were surveyed and were presented with a number of statements on a Likert-type scale to which they were to indicate their level of agreement. The findings indicated that the respondents did not perceive that the Internet was a significant threat to the existing structure of the industry. Most felt the Internet will never replace the traditional mass media like television and newspapers, and most do not think that the Internet will see businesses move away from using advertising agencies. Generally, they feel that the Internet should be incorporated into the media mix along with the traditional mass media.

Comparing respondents who work in different areas in the industry (account services, media planning, research/sales, and advertiser/owner), it was found that there were four statements that resulted in statistically significant different responses:

- (1) the 'Account Service' and 'Research/Sales Staff' were more concerned about the effect of Internet on how agencies relate to their clients than the media planners or advertisers/owners;
- (2) the Account Service thought that other media will have more of an effect than the Internet, than the other groups, particularly compared to advertisers/owners;
- (3) the Research/Sales staff and advertisers/owners felt that creative work will be done by clients using specialised graphics software in the future; and

- (4) the Research/Sales staff tended to see local agencies losing their business to large global agencies, while account services and advertiser/owners more strongly disagreed with this view.

For those in the advertising industry, even though this was a study undertaken on the Malaysian advertising industry, there could be some valuable worldwide warnings from these results. An important implication of the findings is for agencies not to over-hype the Internet as a new medium in media planning strategies. The Internet can be seen as an important development, especially when targeting certain niche markets, but do not lose sight of the traditional media. Knowledge of the Internet can be important in how the agency is perceived when formulating an integrated media plan, but whether it is an integral part of it may depend on the target audience. Warnings can also be made about potential changes in future agency-client relations, the development of other media, the client undertaking some work in-house and the threat of loss of business to large, global agencies.

As research continues on various issues related to the Internet, it is important to gauge the views of those in the industry on the effects of the Internet and to predict future changes. This study observed Malaysia as it is not a western country and has a highly regulated, multicultural society, however, other countries would be worth studying to determine whether the views indicated here reflect advertising industry views worldwide. It would also be interesting to determine to what extent advertising agencies actually use the Internet in their business communications. As media technology advances, advertising agencies must be on top of any changes and be able to service their clients appropriately.

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