

Evolution of online

Kieron Matthews - Marketing Director

ia
do



Internet Advertising
Bureau www.iabuk.net

Who we are

*To help **marketers** find the best role for
online advertising and mobile, to **engage**
customers and **build** their **brands***



Who



Driven by consumers



Driven by consumers

FILM
TV
RADIO
PRESS
OUTDOOR



PASSIVE



Driven by consumers

FILM
TV
RADIO
PRESS
OUTDOOR



PASSIVE

INTERNET
MOBILE
GUERILLA
AMBIENT
RED BUTTON



ACTIVE



Driven by consumers

FILM
TV
RADIO
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OUTDOOR



PASSIVE

INTERNET
MOBILE
GUERILLA
AMBIENT
RED BUTTON



ACTIVE

FACEBOOK
PODCASTING
YOUTUBE
FLICKR
TWITTER



ENGAGED



Media landscape is now more complex



Media landscape is now more complex



Media you
own



Media landscape is now more complex



Media you
own

Media you
buy



Media landscape is now more complex



Media you
own



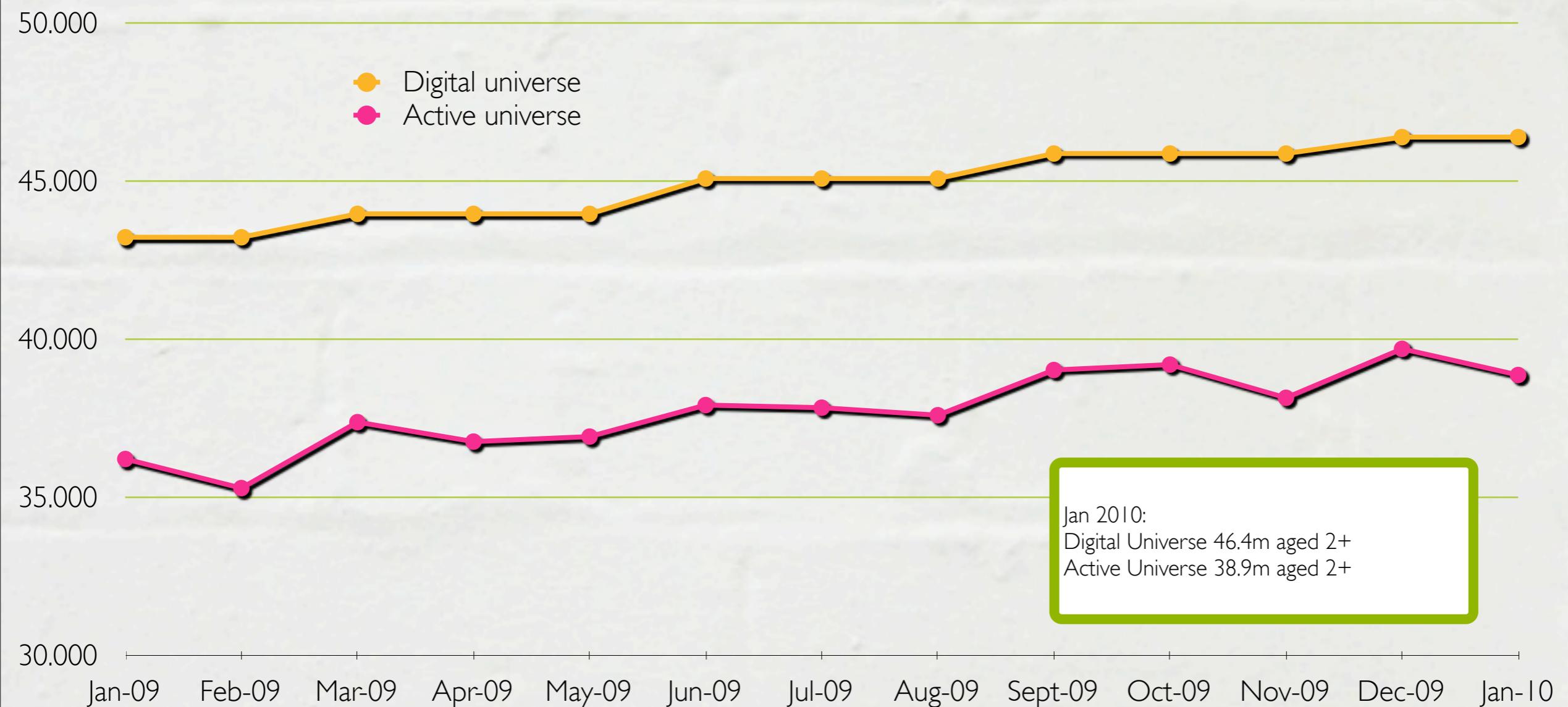
Media you
buy



Media you
earn



Active users up 3 million since January 2009



Jan 2010:
Digital Universe 46.4m aged 2+
Active Universe 38.9m aged 2+

Source: UKOM APS Jan 10; Nielsen Netview Jan 09-Dec 09





Stalked by Stork

AGE 28
5 FT 7 IN
135 LBS.
\$20.

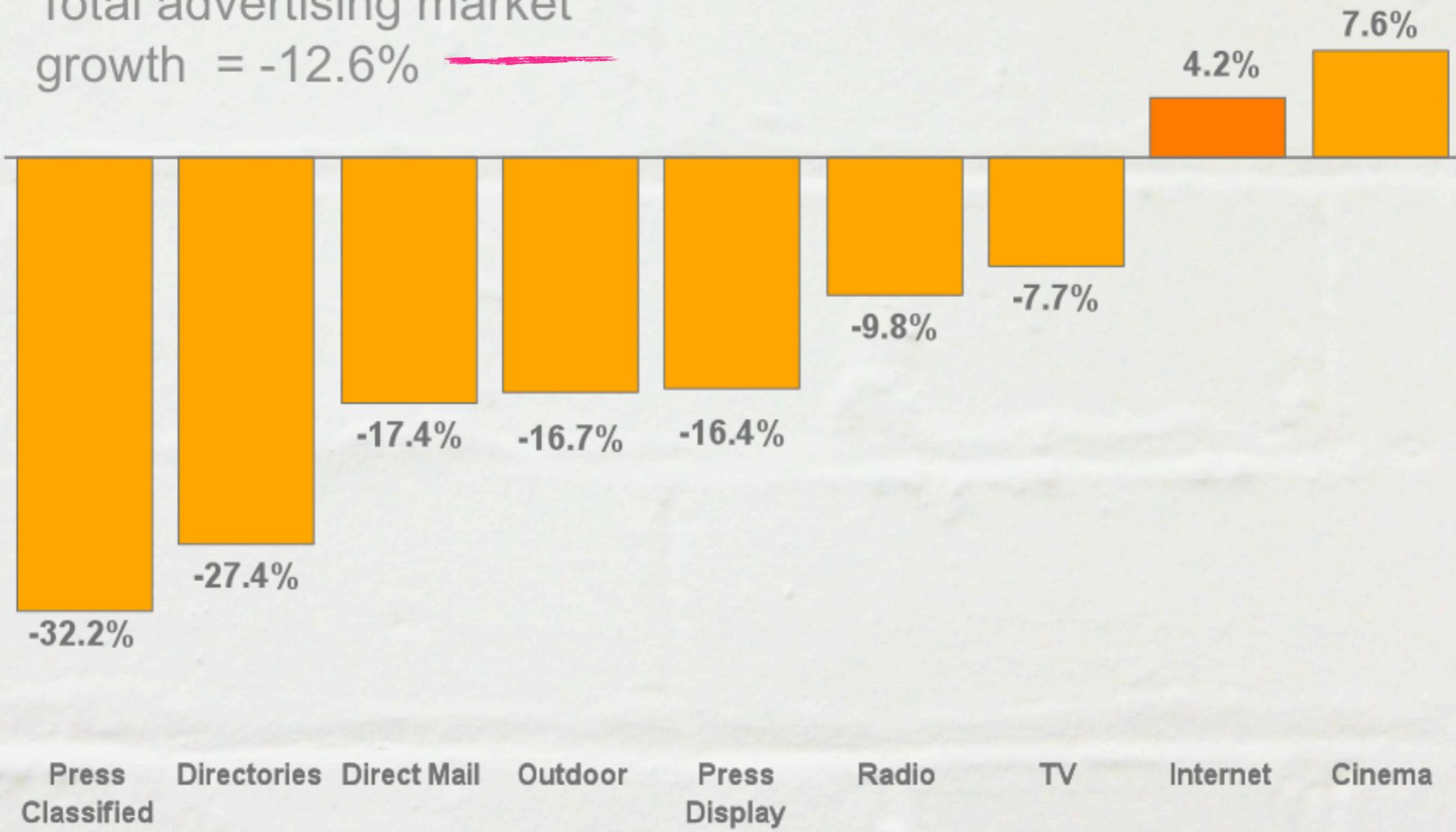
I WANT
WORK
Now!!

8 YEARS EXPERIENCE
ADVERTISING.
SALES PROMOTION.
CONTACT, PUBLICITY, PRINTING, etc.

The ad market was hit hard in 2009

Year on year growth for 2009 (TV without sponsorship)

Total advertising market
growth = -12.6%



Press
Classified

Directories

Direct Mail

Outdoor

Press
Display

Radio

TV

Internet

Cinema



The ad market was hit hard in 2009

Year on year growth for 2009 (TV without sponsorship)



Press
Classified

Directories

Direct Mail

Outdoor

Press
Display

Radio

TV

Internet

Cinema



£3,541.08m

market in 2009

An increase of
£191.39m year-on-year

2009 vs. 2008

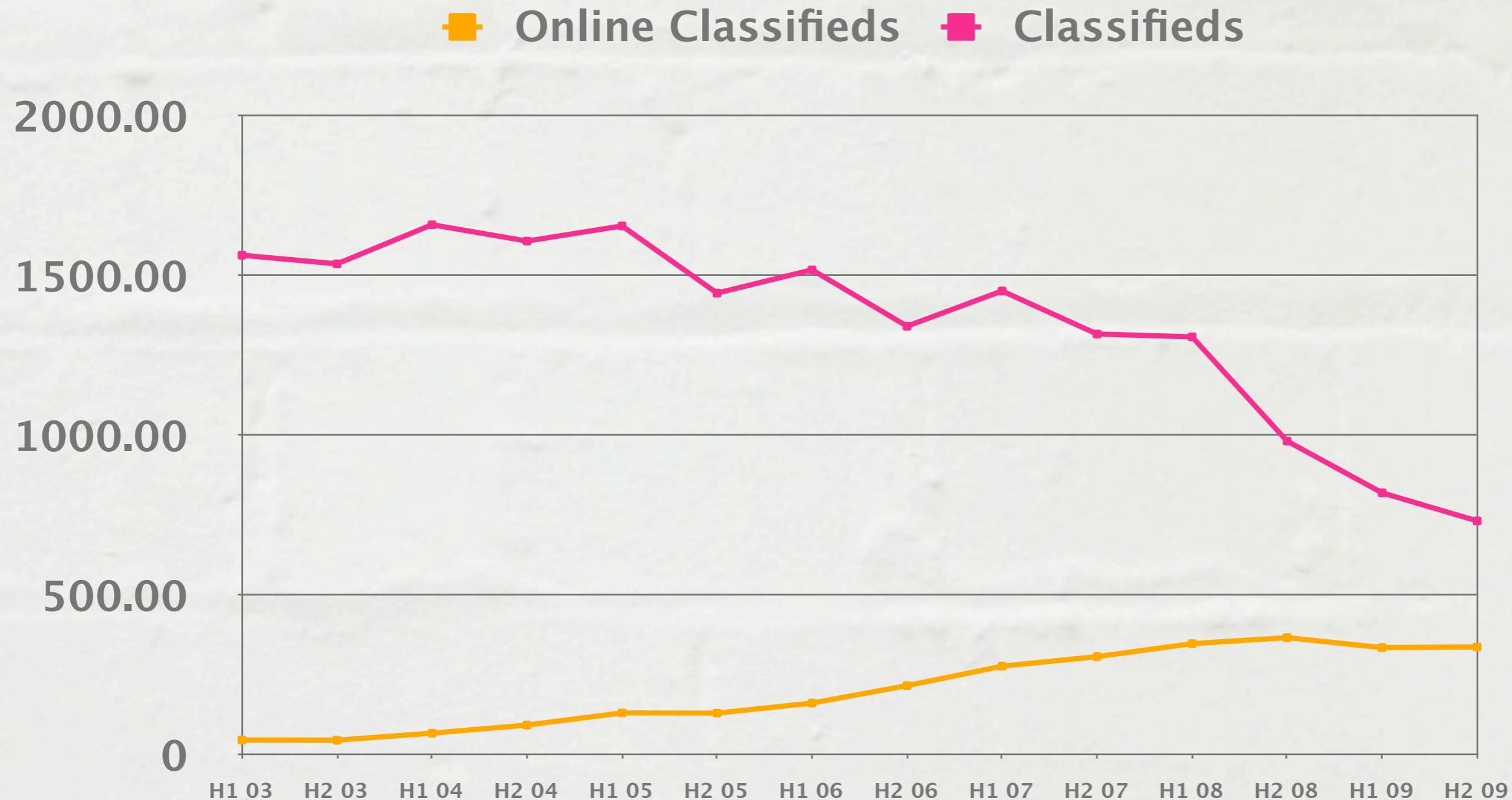
4.2% increase
on a like for like basis



Source: PricewaterhouseCoopers / Internet Advertising Bureau / WARC

Tuesday, 11 May 2010

Steady decline in offline classifieds – migrating to online

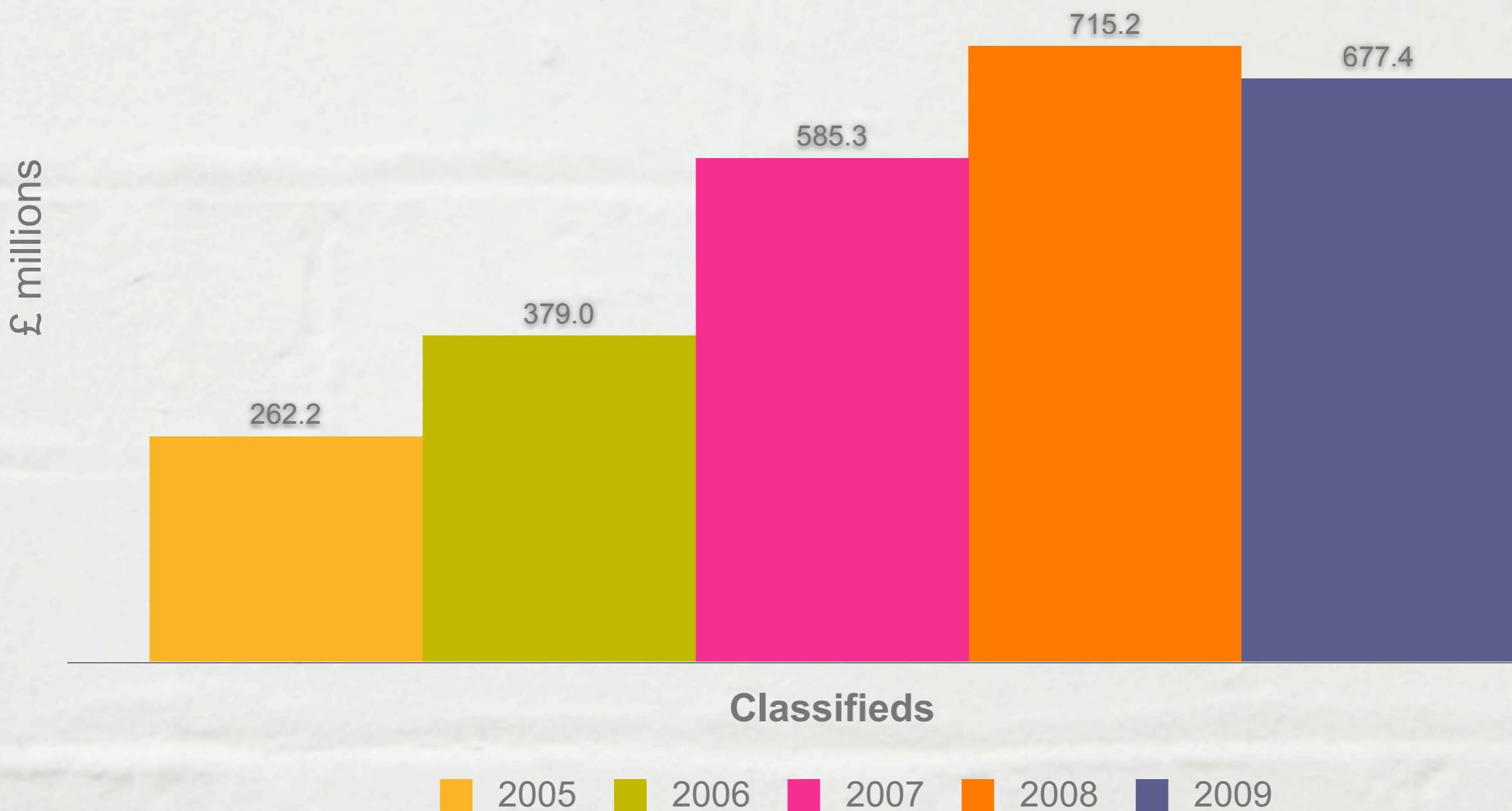


Source: IAB/PwC Online Adspend Study



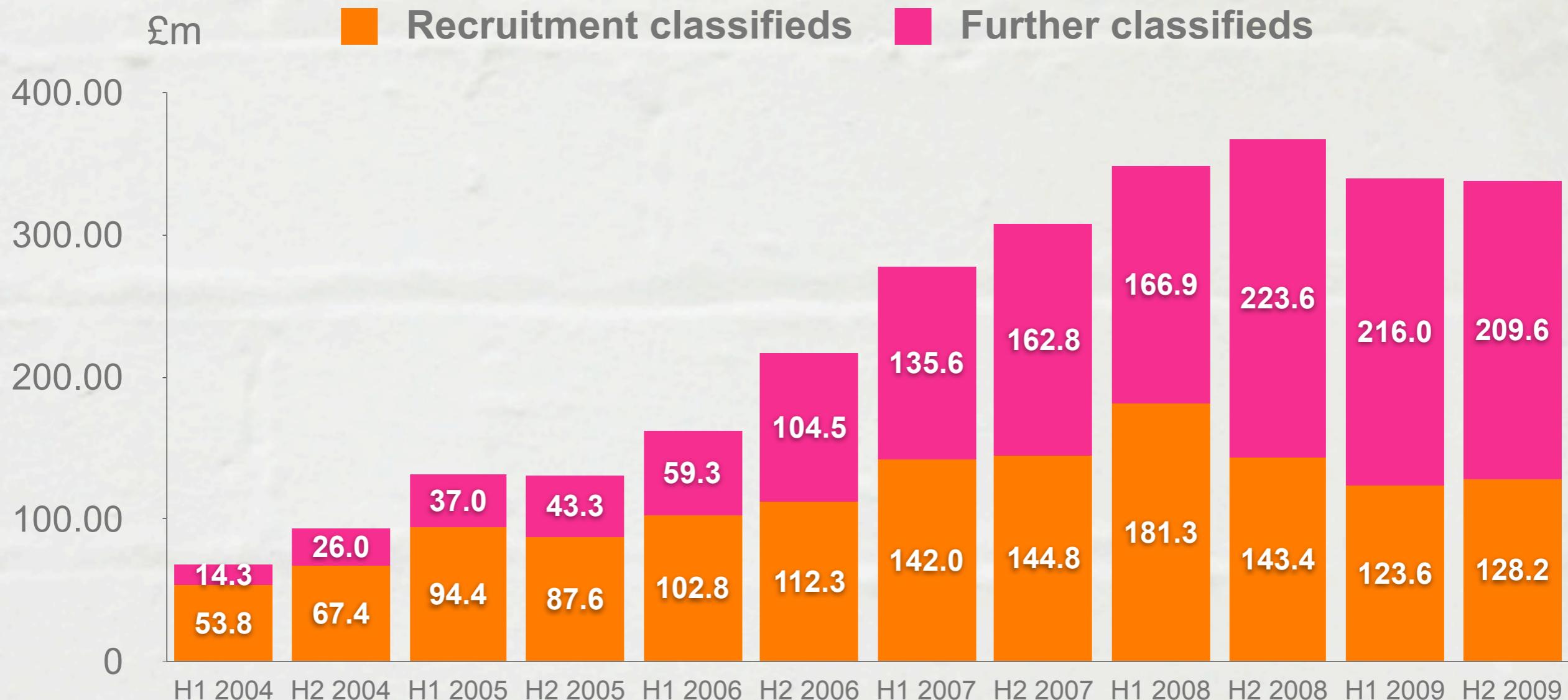
Year on year classifieds spend

On a Like-for-Like Classifieds decreased by 5.3%



Source: PricewaterhouseCoopers / Internet Advertising Bureau / WARC

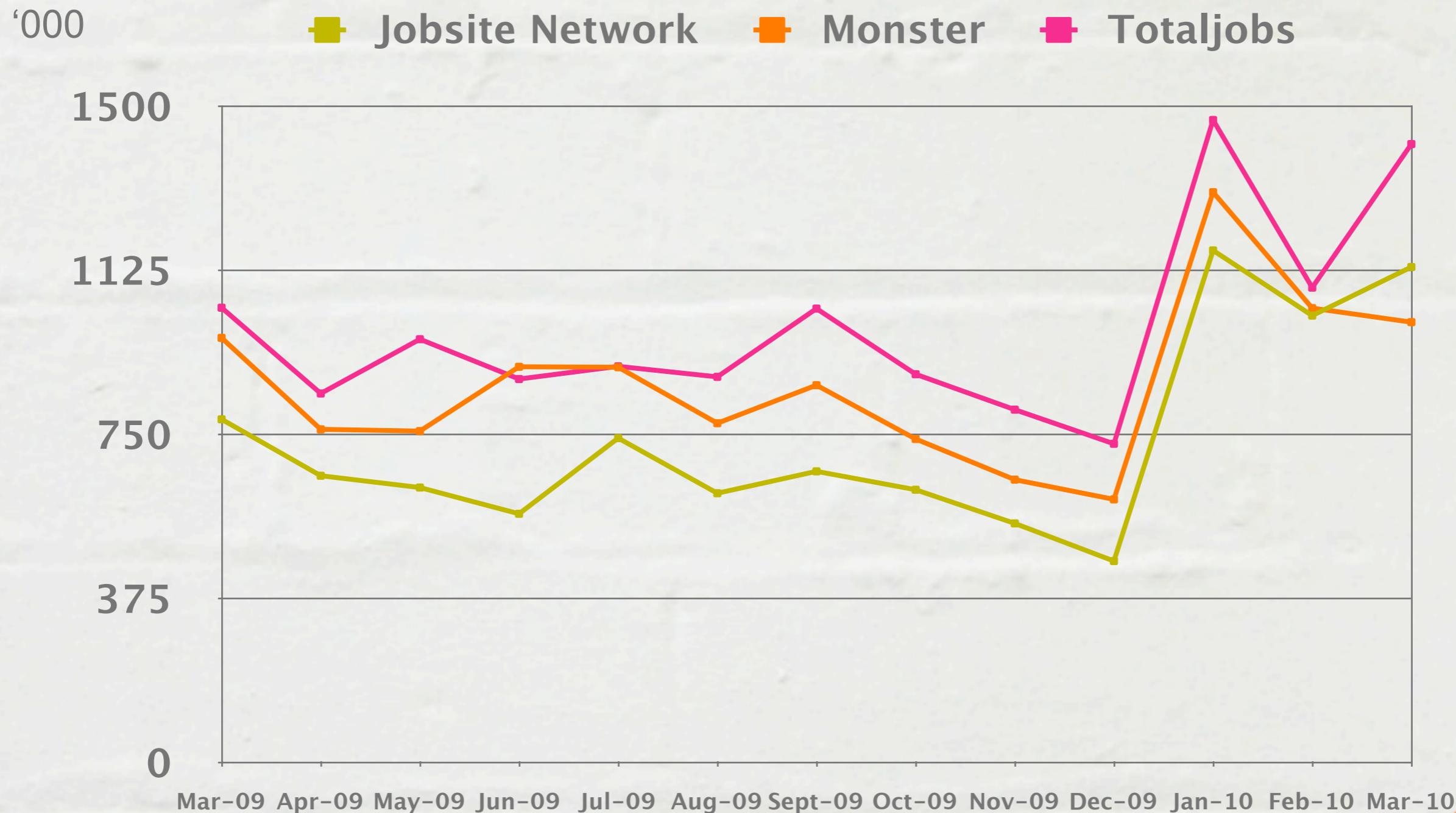
Classified market is stabilising



Reported Figures, not like for like comparison
Source: Internet Advertising Bureau / PricewaterhouseCoopers



Unique reach to popular recruitment sites show a rise in January..



Source: UKOM



Mobile market also achieving growth in 2009

£37.6m
+32.2%

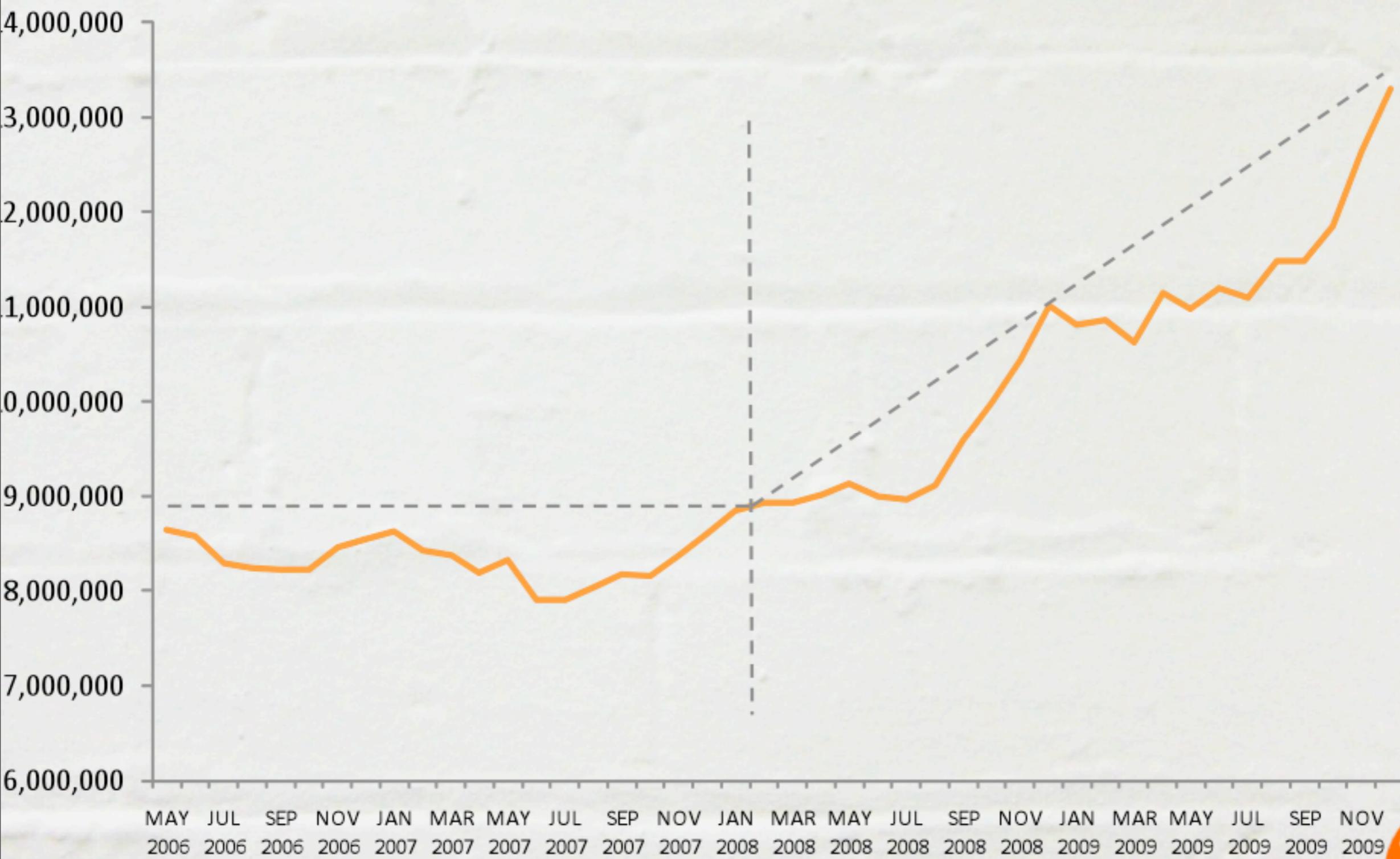


Source: IAB / PwC mobile display ad spend survey 2009; search spend figure derived from modelling and industry estimates

Trends



Mobile internet usage is still growing



Source: Comscore 3 month rolling average







Traditional classified going mobile

WHATCAR? (Left Screen)

Used cars for sale. Contact info & terms: www.whatcar.com/20-VT... Google

WHATCAR? (Middle Screen)

Home | Reviews | Advice & tips | News | Cars for sale | Valuations | Calculators

Used cars for sale

Cars for sale - Find a great deal on new or used cars.

Used cars for sale

We've got thousands of quality used cars at dealers and supermarkets.

Search used cars for sale

Contact hire and leasing

Find your local dealer or car supermarket quickly and easily

Contact Hire & Leasing Deals

New car deals

Your new car shopping starts here, get a great price from a great dealer

Search new cars for sale

Find your nearest dealer

Find your local dealer or car supermarket quickly and easily

Search local dealers

Home | Reviews | Advice & tips | News | Cars for sale | Valuations | Calculators

Go to full site | Contact | Terms & Conditions

Photo4Cars (Right Screen)

Home | Reviews | Advice & tips | News | Cars for sale | Valuations | Calculators

Used | Hire & Lease | New | Dealers

Your results (12)

Price - low to high

Go

1 | 2 | 3 | 4 | 5 | 6 | 7 | Next | Last

Audi A4 2.0 SE S Line
Avant Estate (TRADE)
£10,799
White City, London
* CD-Player, * ABS Brakes, * Air Conditioning, * Alloy Wheels, * Central Locking...

Audi A4 1.8 T S Line
Saloon (TRADE)
£11,000
White City, London
* CD-Player, * ABS Brakes, * Air Conditioning, * Alloy Wheels, * Central Locking...

Audi A4 2.0 SE Saloon (TRADE)
£11,799
White City, London
* CD-Player, * ABS Brakes, * Air Conditioning, * Alloy Wheels, * Central Locking...

Audi A4 2.0 TDI 140 Sport Convertible (TRADE)
£16,799
White City, London
* CD-Player, * ABS Brakes, * Air Conditioning, * Alloy Wheels, * Central Locking...

Audi A4 1.8 T FSI (120 PS) Estate (TRADE)
£17,450
Whitstone, London
* ABS Brakes, * Alloy Wheels, * Central Locking, * Alarm, * Driver's Airbag...

1 | 2 | 3 | 4 | 5 | 6 | 7 | Next

The Big Blue Car Company

BMW X3 D SPORT 2005
(2005)
£13,489

Previous Advert

3.0d M Sport Auto Fully Loaded no extras missed. (2005)
£16,500
2 days

2004 BMW X3 SE GREY
(2004)
£8,299
3 days

Classified Garage Board Ltd

1998 BMW Z3M 3.2
£18,995

Practor Car Sales Ltd

BMW X3 2.0D SPORT SDR. (2005)
£13,990

UAS and Consalde

BMW X3 SE (With Full Leather) (2004)



Embedding real time commentary

The ash cloud over Northern Europe has given rise to some interesting Twitter use-cases:

- Think Social explores and explains the use of the [#getmehome](#) hashtag.
- The airline [KLM](#) is engaging with its (frustrated) customers in a human voice.
- [LeSoir](#) is using [Publitweet](#) to curate and present volcano tweets.
- [Yahoo News](#) has assembled a tight, curated volcano news list.

We also love [@theashcloud](#), with tweets from, er, the plume of Eyjafjallajökull itself:

What is everyone doing today? The Ash Cloud is planning to float and maybe some drifting later on! [#ashcloud](#) [#ashcloud](#)



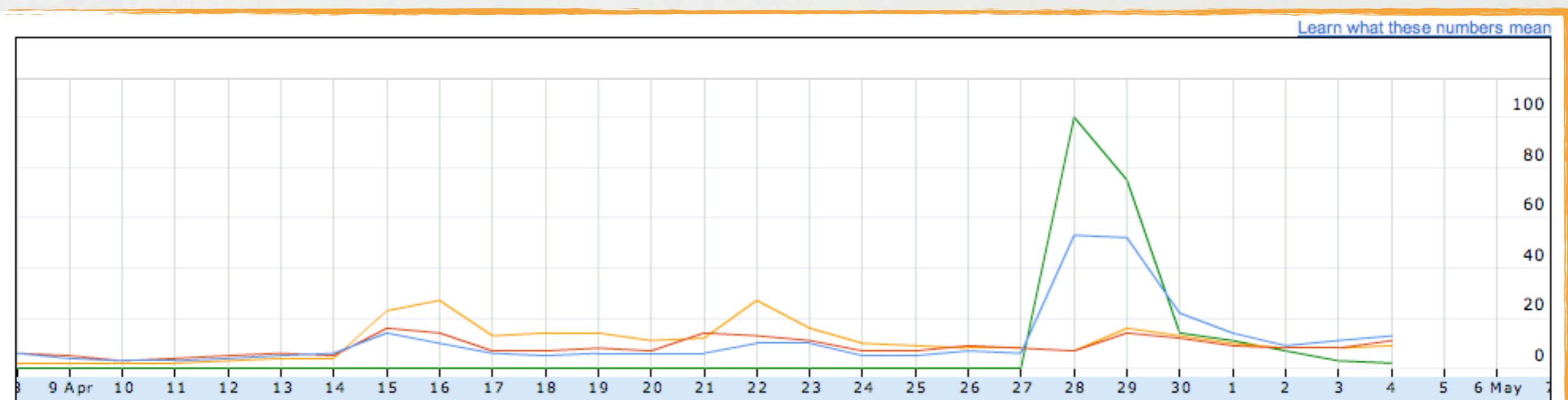
[The Ash Cloud](#)

about 3 minutes ago via web

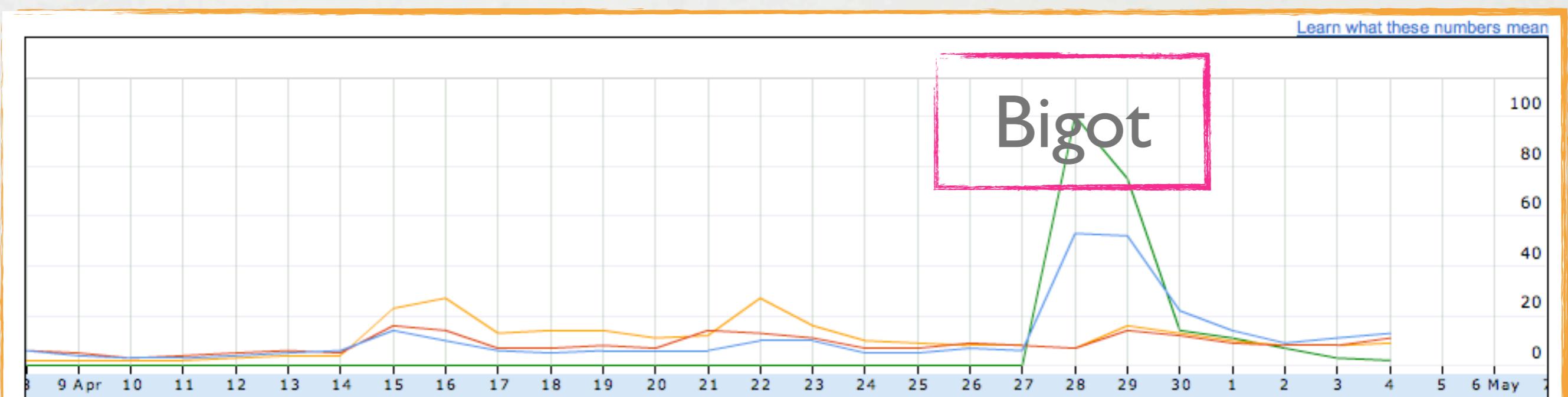
Now, this is 100% fun, obviously—but imagine an anthropomorphic account bent to a more serious purpose. Could you deliver important news about air travel in the voice of the ash cloud itself? It makes us think of accounts like [the Tower Bridge](#). There's something powerful about a first-person voice in a Twitter timeline—even if it's not actually a person at all.



Getting real time



Getting real time



What next?



Rich, real term search

Google leaders debate Advanced Search

Search: the web pages from the UK

Web Results 1 - 10 of about 29,200,000 for leaders debate. (0.11 sec)

Tonight's Leaders' Debate www.labour.org.uk/LeadersDebate Get exclusive content and coverage of tonight's leaders' debate online Sponsored Links

The Leaders Debate www.conservatives.com/leadersdebate Watching Tonight? Follow the Action Live with The Conservatives Sponsored Links

News results for leaders debate

 [Final Leaders' Debate Before General Election](#) - 1 hour ago
Gordon Brown, David Cameron and Nick Clegg are about to take part in the final leaders' debate ahead of the General Election on May 6. ...

[Sky News](#) - 2578 related articles »

[Final leaders' debate: SNP loses court challenge against BBC](#) -
[The Guardian](#) - 743 related articles »

[General Election 2010: a fact checker for the leaders' debate on ...](#) -
[Telegraph.co.uk](#) - 33 related articles »

Latest results for leaders debate - [Pause](#)

[Mangowe](#): still working & not watching leaders debate, but Twitter keeps me apprised of the important facts; Cameron is poshing it up & has sweaty chin
[Twitter](#) - 1 minute ago

[JustFootball](#): Can't handle another leaders debate. The 180 minutes I already watched were too depressing
[Twitter](#) - 2 minutes ago

[themanwhofell](#): I am not watching the leader's debate. I am in a Wetherspoons' solving the deficit problem.
[Twitter](#) - 2 minutes ago

[Election debate: Comeback kid Cameron counter attacks to slow ...](#) 
29 Apr 2010 ... Flashpoint: Nick Clegg and Gordon Brown look on as David Cameron makes a point during tonight's second live leaders' election debate ...
www.dailymail.co.uk/.../Election-debate-Comeback-kid-Cameron-counter-attacks-slow-Clegg-bandwagon.html - 12 hours ago

[The Election Debates - ITV News](#) 
The first Election Debate during the 2010 General Election campaign will be screened ... to the Election Debate based on a sample group of UK voters... more ...
www.itv.com/electiondebate/ - [Cached](#)

[First leaders' debate: live blog - as it happened | Politics ...](#) 
15 Apr 2010 ... Join Andrew Sparrow for rolling coverage of the first party leaders' debate with Gordon Brown, David Cameron and Nick Clegg.
www.guardian.co.uk/politics/blog/2010/.../leaders-debate-live-blog - [Cached](#)

Sponsored Links

Leaders Debate
See what the parties are saying on health ahead of the **Leaders Debate**
www.KingsFund.org.uk

Nature Needs a Voice
Sign our Letter to the Future and Speak up for Nature in the Election
www.RSPB.org.uk/LettertotheFuture

A twist on election night
C4's Alternative Election Night. The news, but funnier. May 6, 9pm
www.Channel4.com/Election_Night

Leaders debate
Aged 55+? Demand answers to the issues that affect you!
www.ageuk.org.uk

Ann Summers™ Online
We specialise in long, hard, Elections! Visit us online today.
AnnSummers.com/Election2010

Clegg, Cameron or Brown
Election News Get Your Policy In Front Of Millions. Today!
thepeoplespolicies.co.uk/Policynews

[See your ad here »](#)



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Deeper engagement

Google leaders debate [Advanced Search](#)
Search: the web pages from the UK

Web > Latest Hide options

› All results [Images](#) [Videos](#) [News](#) [Blogs](#) [Updates](#) [Books](#) [Discussions](#)

Any time [Latest](#) [Past 24 hours](#) [Past week](#) [Past year](#) [Specific date range](#) [Reset options](#)

New results will appear below as they become available. [Pause](#)

 [Mayah_Riaz](#): [@twitvotueuk](#) You may be interested in [#MayahsPoll](#) running during tonight's **Leaders debate**. If you want more info, contact me. [Twitter](#) - 10 seconds ago

 [AntoinePouliot](#): last British **leaders debate** livestreaming on [bbc.co.uk!](#) [Twitter](#) - 12 seconds ago

 [RosClarkie](#): [@747Captain](#) my twitter is likely to crash!! Someone I know is watching **leaders debate**!!! :0) [Twitter](#) - 14 seconds ago

 [cha0tic](#): [@ClaudiaC](#) Ta. Especially tonight, as we've got our **leaders debate** for the election. The Tweet Streams are burning up. [Twitter](#) - 30 seconds ago

 [standupkid](#): Attempting to watch the UK **leaders' debate** via wi-fi on a train. Buffering. Lots of buffering. Annoying. [Twitter](#) - 42 seconds ago

[Prime ministerial debate liveblog](#)
 [The Yorker](#) - 3 minutes ago
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 [scottcampbell](#): Watching the **Leaders' Debate** on the BBC website. [Twitter](#) - 5 minutes ago

[The Third Leaders' Debate: Live chat | GlobalPost](#)
29 Apr 2010 ... Welcome to Lib Dem Voice's coverage of the third televised **debate** between the three main party **leaders**, an event perhaps even more keenly ... [www.globalpost.com/.../the-third-leaders'-debate-live-chat](#) - 10 minutes ago

[Latest Updates on the British Leaders' Debate](#)
[New York Times](#) - 12 minutes ago
By ROBERT MACKEY We are watching Thursday's **debate** among the **leaders** of Britain's three largest political parties with one eye and scanning the Web for ...

Top links
[BBC News - Election 2010: Leaders prepare for TV debate on economy](#)
The **leaders** of the three main parties prepare for the last **TV debate** before the election - focusing on the economy. [http://news.bbc.co.uk/2/hi/.../8650546.stm](#)
[All mentions »](#)

[Third leaders' debate – live blog | Politics | guardian.co.uk](#)
Join Andrew Sparrow for live coverage as Gordon Brown, David Cameron and Nick Clegg clash for the final time in the last **leaders'** ... [http://www.guardian.co.uk/.../leaders-debate-...](#)
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[All mentions »](#)



Real time

election

2010 › May › 06 – 07

New results will appear below as they become available. [Pause](#)

 [KeithOlbermann](#): @Skawtnyc A ukelele election would make more sense

 [Eve_Metra](#): Twitter - seconds ago got a text message saying that their plan to cheat this coming election is callid Project Fullmoon

 [Crawley_Obby](#): ELECTION: Labour's Oxlade vows to fight on: Labour's Chris Oxlade vowed not to 'give up' and said 'this is only th... [crawleyobserver.co.uk](#)

 [khaldeam](#): #ukelection Twitter - seconds ago the sun is up but unable to shine any light on the election results.

 [Pollytics](#): A UK charity should have organised a gig where everytime a BBC dude says "extraordinary" on election night, you have to drop a coin in a tin

 [d_hopkinson](#): Twitter - seconds ago All the election columns in tweetdeck have gone and normality has been restored.

Search [Advanced search](#)

Top links

[Twitpic - Share photos on Twitter](#)

[All mentions »](#)

[BBC News - Election 2010 - Live coverage - General Election 2010](#)
0549: "We always said this election was going to be a challenge because of the point we were starting from," says shadow home secretary Chris Grayling. ...
<http://news.bbc.co.uk/.../election2010/liveeve...>
[All mentions »](#)

[BBC NEWS | Election 2010 | Results | United Kingdom - National Results](#)
BBC News General Election 2010, full results for the United Kingdom (UK)
<http://news.bbc.co.uk/2/.../election2010/result...>
[All mentions »](#)

[UK election results map | Politics | guardian.co.uk](#)
Our election results map showing all the results in all UK constituencies.
<http://www.guardian.co.uk/.../uk-election-...>
[All mentions »](#)



Rise of promoted realtime search

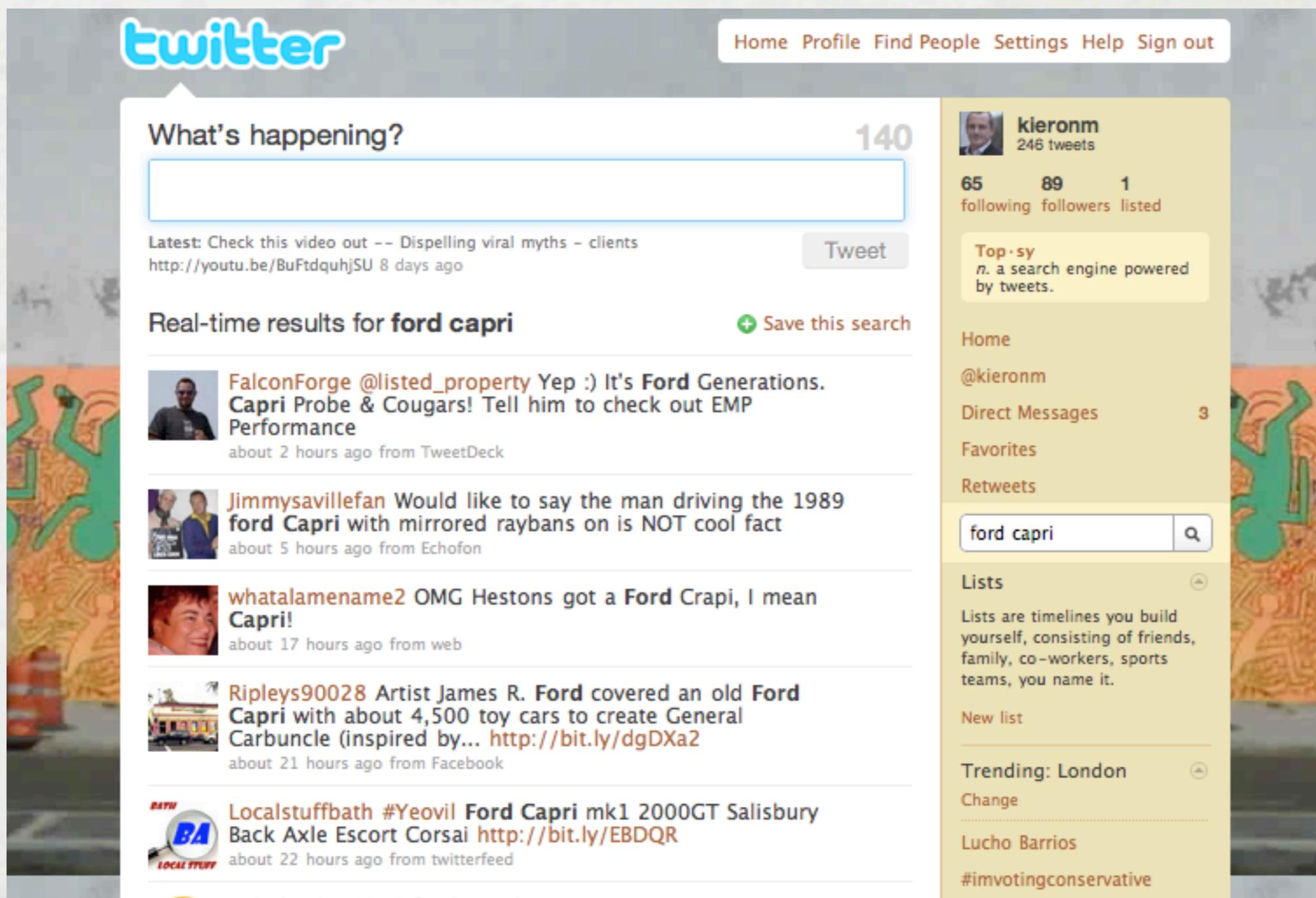
Search results for **starbucks** + Save this search

 **Starbucks** On 4/15 bring in a reusable tumbler and we'll fill it with brewed coffee for free. Let's all switch from paper cups. <http://bit.ly/9ZDP6N>

about 8 hours ago via CoTweet by [bradnelson](#)
Promoted by Starbucks Coffee 100+ Retweets



Opportunities for realtime promotion



Home Profile Find People Settings Help Sign out

What's happening? 140

Latest: Check this video out -- Dispelling viral myths - clients
<http://youtu.be/BuFtdquhjSU> 8 days ago

Tweet

Real-time results for **ford capri** + Save this search

FalconForge @listed_property Yep :) It's Ford Generations. Capri Probe & Cougars! Tell him to check out EMP Performance
about 2 hours ago from TweetDeck

Jimmysavillefan Would like to say the man driving the 1989 **ford Capri** with mirrored raybans on is NOT cool fact
about 5 hours ago from Echofon

whatalamename2 OMG Hestons got a **Ford Crapi**, I mean **Capri!**
about 17 hours ago from web

Ripleys90028 Artist James R. Ford covered an old **Ford Capri** with about 4,500 toy cars to create General Carbuncle (inspired by... <http://bit.ly/dgDXa2>)
about 21 hours ago from Facebook

Localstuffbath #Yeovil **Ford Capri** mk1 2000GT Salisbury Back Axle Escort Corsai <http://bit.ly/EBDQR>
about 22 hours ago from twitterfeed

kieronom 246 tweets
65 following 89 followers 1 listed

Top · sy
n. a search engine powered by tweets.

Home
@kieronom
Direct Messages 3
Favorites
Retweets

ford capri

Lists
Lists are timelines you build yourself, consisting of friends, family, co-workers, sports teams, you name it.

New list

Trending: London
Change

Lucho Barrios
#imvotingconservative



Opportunities for realtime promotion

The image shows a composite of two screenshots. The left side is a Twitter feed with a light gray background. The right side is a screenshot of an eBay auction page for a 'Ford Capri mk1 2000GT Salisbury Back Axle Escort Corsair' with a white background. A pink arrow originates from the 'Lists' section in the eBay sidebar and points towards the 'What's happening?' search bar in the Twitter sidebar.

Twitter Sidebar (Left):

- Home Profile Find People Settings Help Sign out
- What's happening?
- 140
- kieronm 246 tweets
- 65 89 1

Twitter Feed (Left):

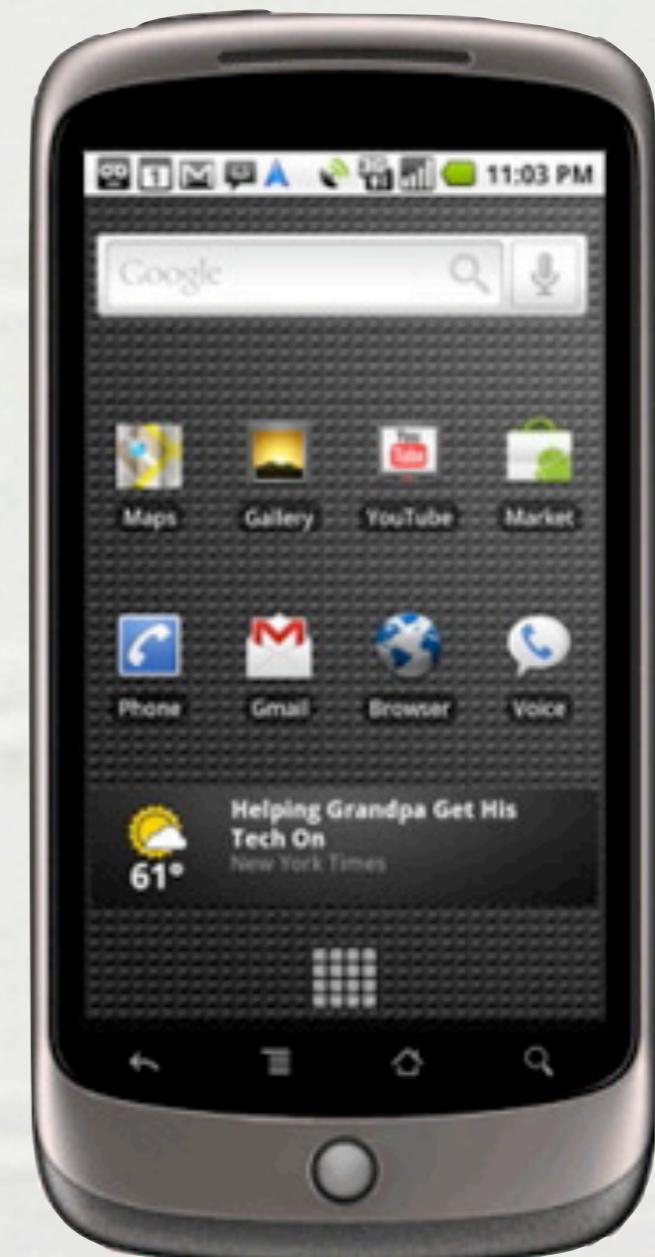
- Latest: Check this video out -- Dispelling viral myths - clients <http://youtu.be/BuFtdquhjSU> 8 days ago
- Real-time results for **ford capri**
- FalconForge @listed_property Yep :) It's Ford Generations. Capri Probe & Cougars! Tell him to check out EMP Performance about 2 hours ago from TweetDeck
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- Localstuffbath #Yeovil **Ford Capri mk1 2000GT Salisbury Back Axle Escort Corsair** <http://bit.ly/EBDQR> about 22 hours ago from twitterfeed

eBay Auction (Right):

- Ford Capri mk1 2000GT Salisbury Back Axle Escort Corsair**
- £0.99 (0 Bid)
- End Date: Sunday May-09-2010 14:48:20 BST
- [Bid now](#) | [Add to watch list](#)
- BMX 'TITAN' WRX Series Aluminium frame - VGC**
- Lists
- Lists are timelines you build yourself, consisting of friends, family, co-workers, sports teams, you name it.
- New list
- Trending: London
- Change
- Lucho Barrios
- #imvotingconservative



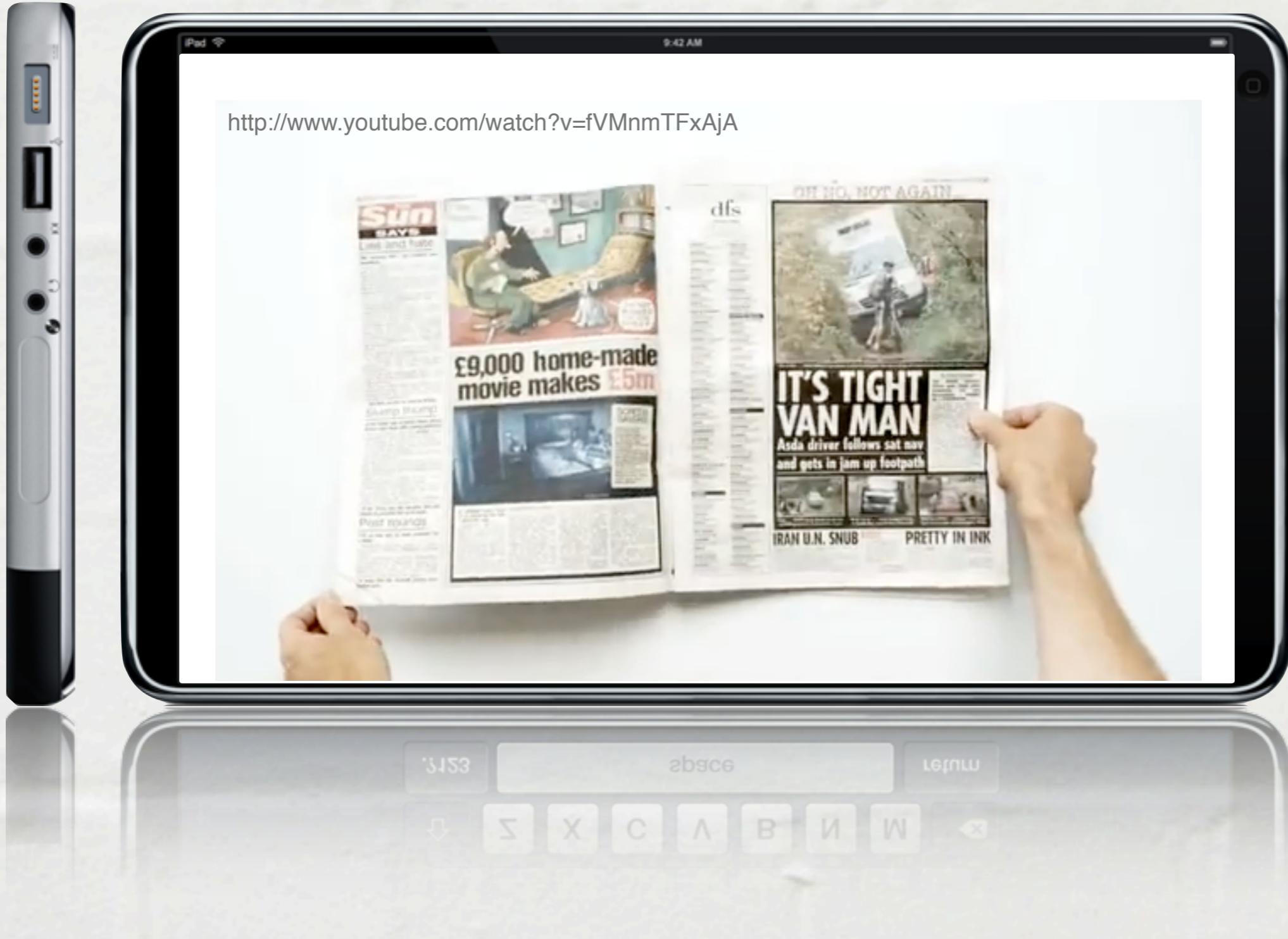
Smartphone ubiquity



Smartphone ubiquity



The impact of iPad and the followers



In summary



In summary

Real
time



In summary

Real
time

Mobile



In summary

Real
time

Mobile

iPad



Thank you

kieron@iabuk.net
#kieronom

iab

Internet Advertising
Bureau www.iabuk.net