

Evolution of online

Kieron Matthews - Marketing Director

iadb



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
PRESS
OUTDOOR



PASSIVE

INTERNET
MOBILE
GUERILLA
AMBIENT
RED BUTTON



ACTIVE

FACEBOOK
PODCASTING
YOUTUBE
FLICKR
TWITTER



ENGAGED

iab

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



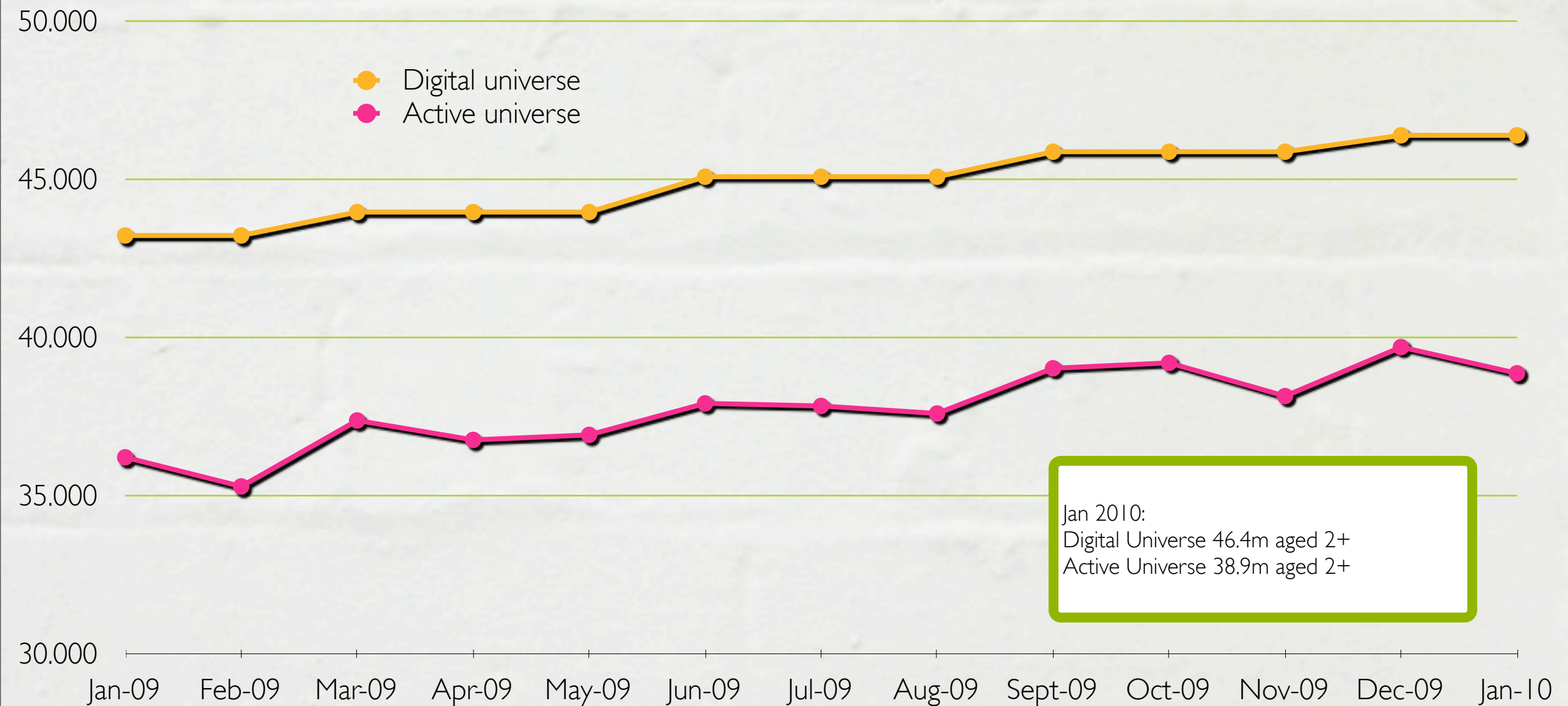
Media you
buy



Media you
earn



Active users up 3 million since January 2009



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!!

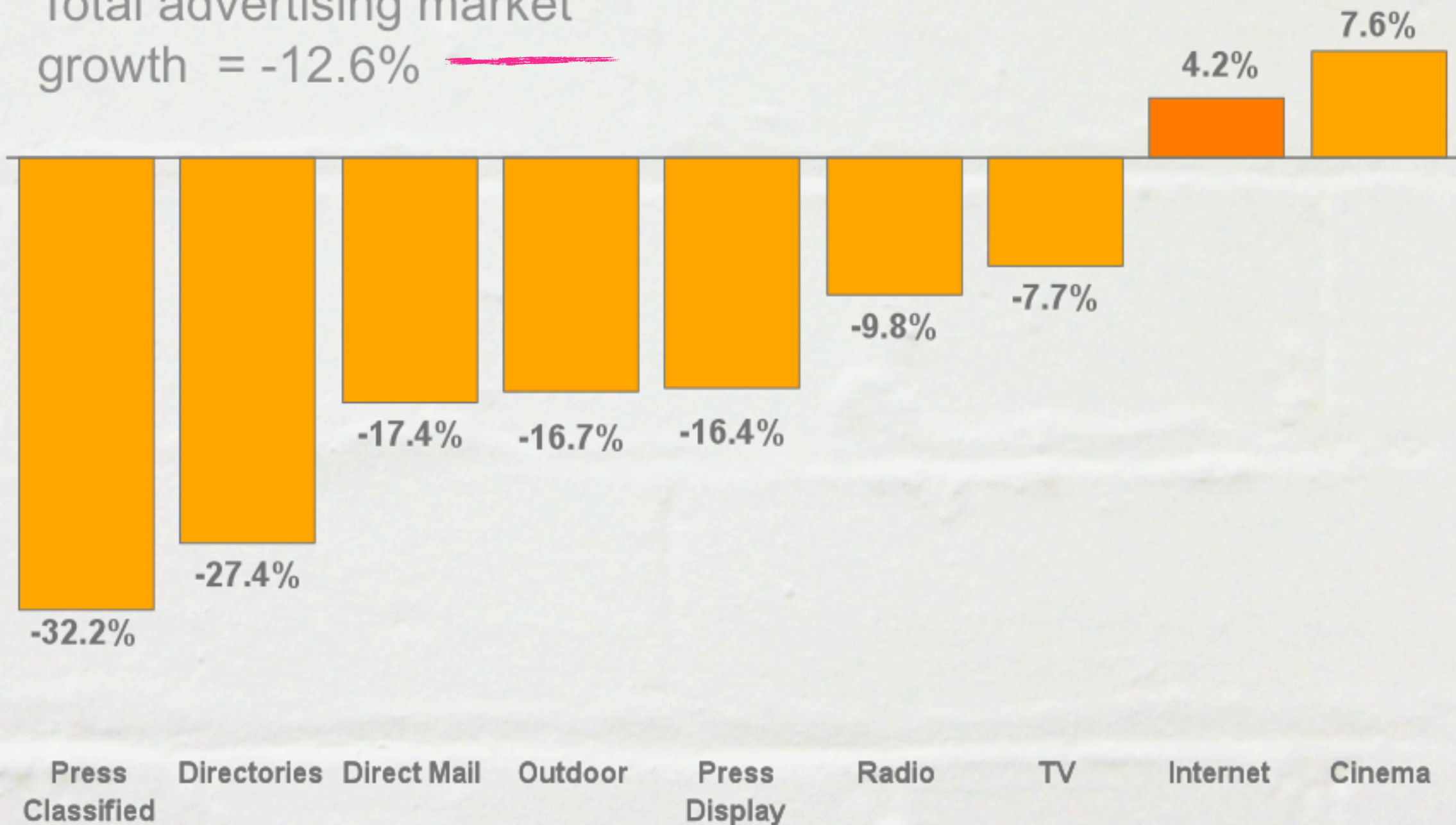
8 YEARS EXPERIENCE
ADVERTISING.
SALES PROMOTION.
CONTACT, PUBLICITY, PRINTING. etc.



The ad market was hit hard in 2009

Year on year growth for 2009 (TV without sponsorship)

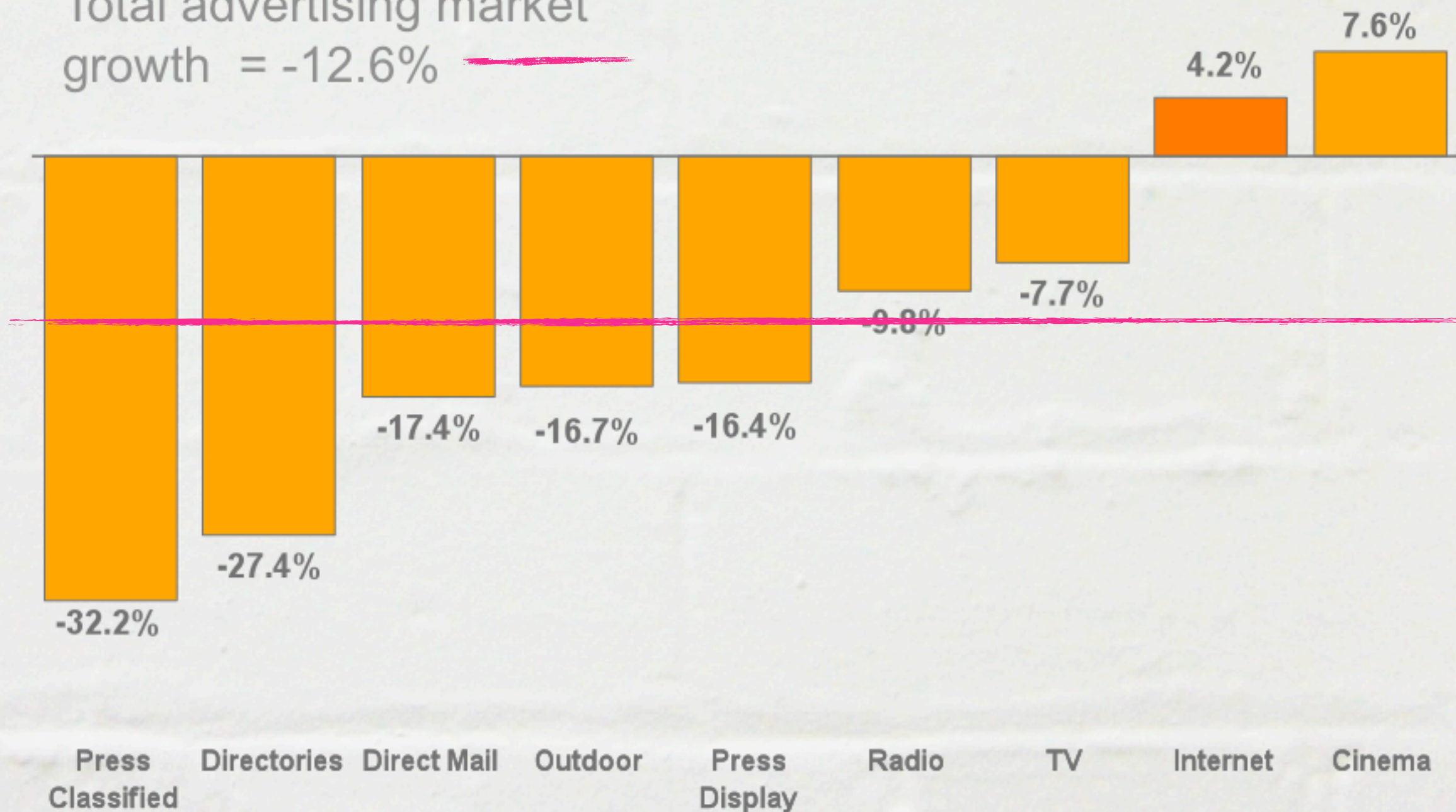
Total advertising market
growth = -12.6%



The ad market was hit hard in 2009

Year on year growth for 2009 (TV without sponsorship)

Total advertising market
growth = -12.6%



£3,541.08m

market in 2009

An **increase** of
£191.39m year-on-year



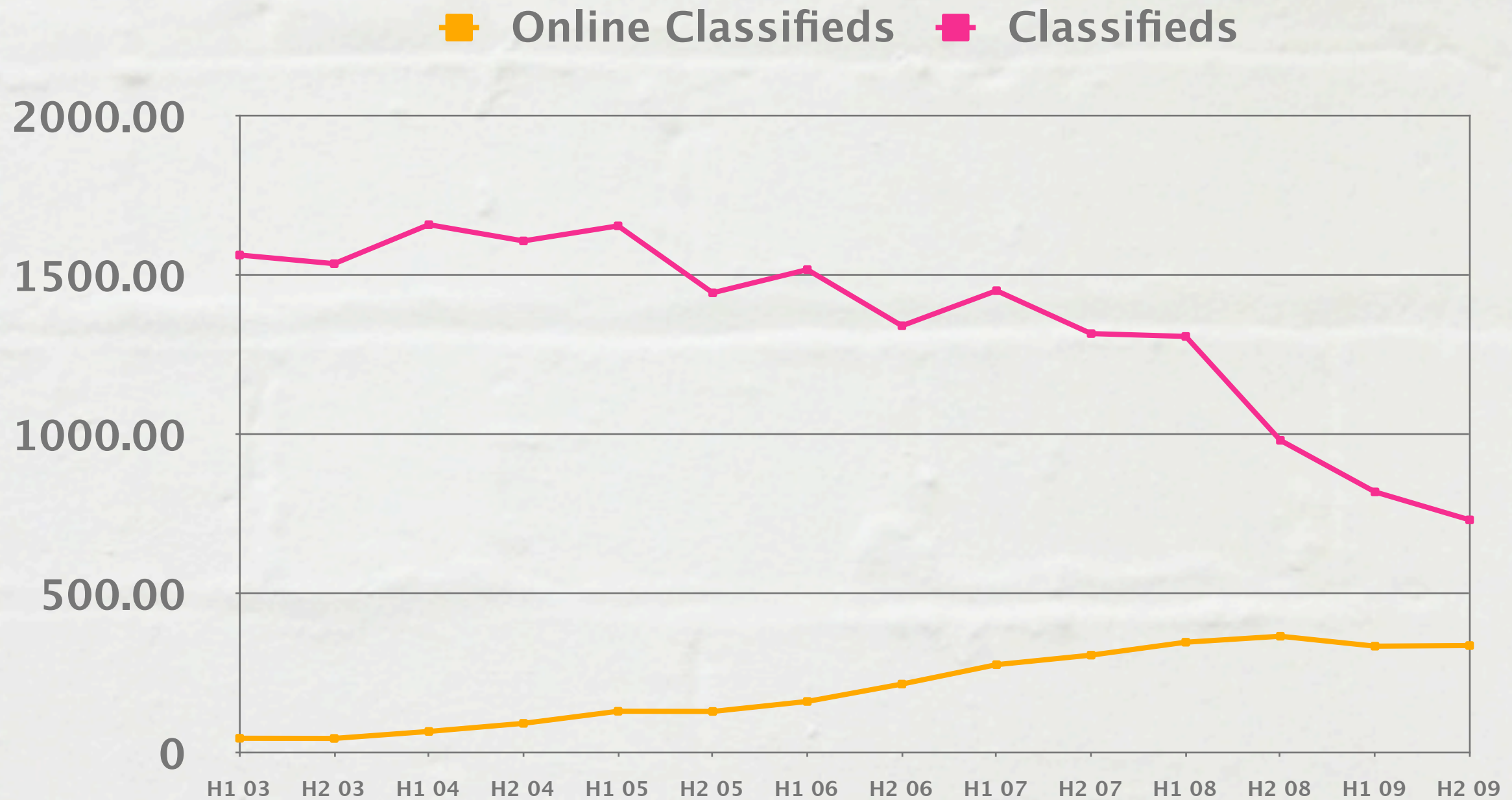
2009 vs. 2008

4.2% increase

on a like for like basis



Steady decline in offline classifieds – migrating to online

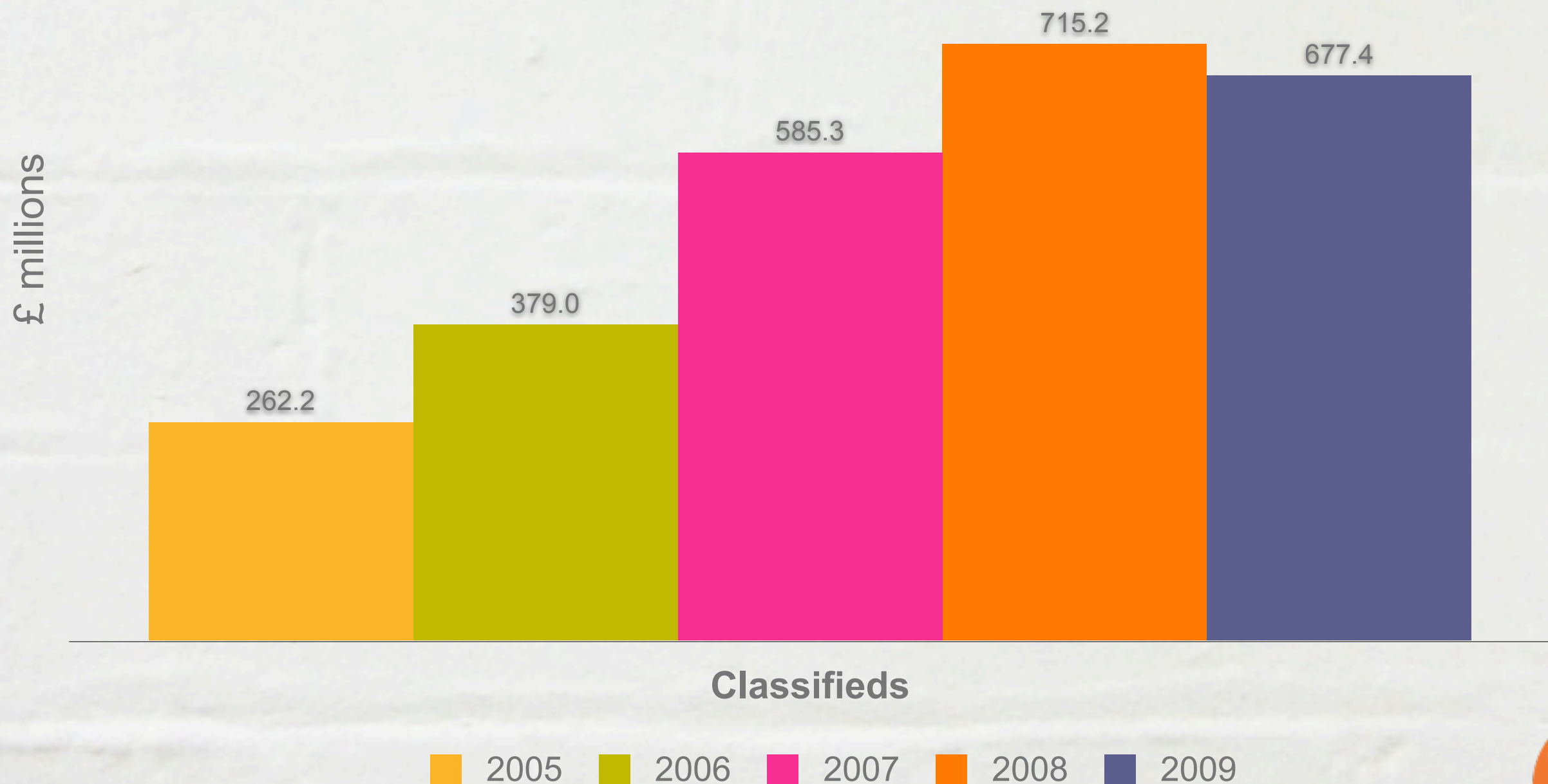


Source: IAB/PwC Online Adspend Study



Year on year classifieds spend

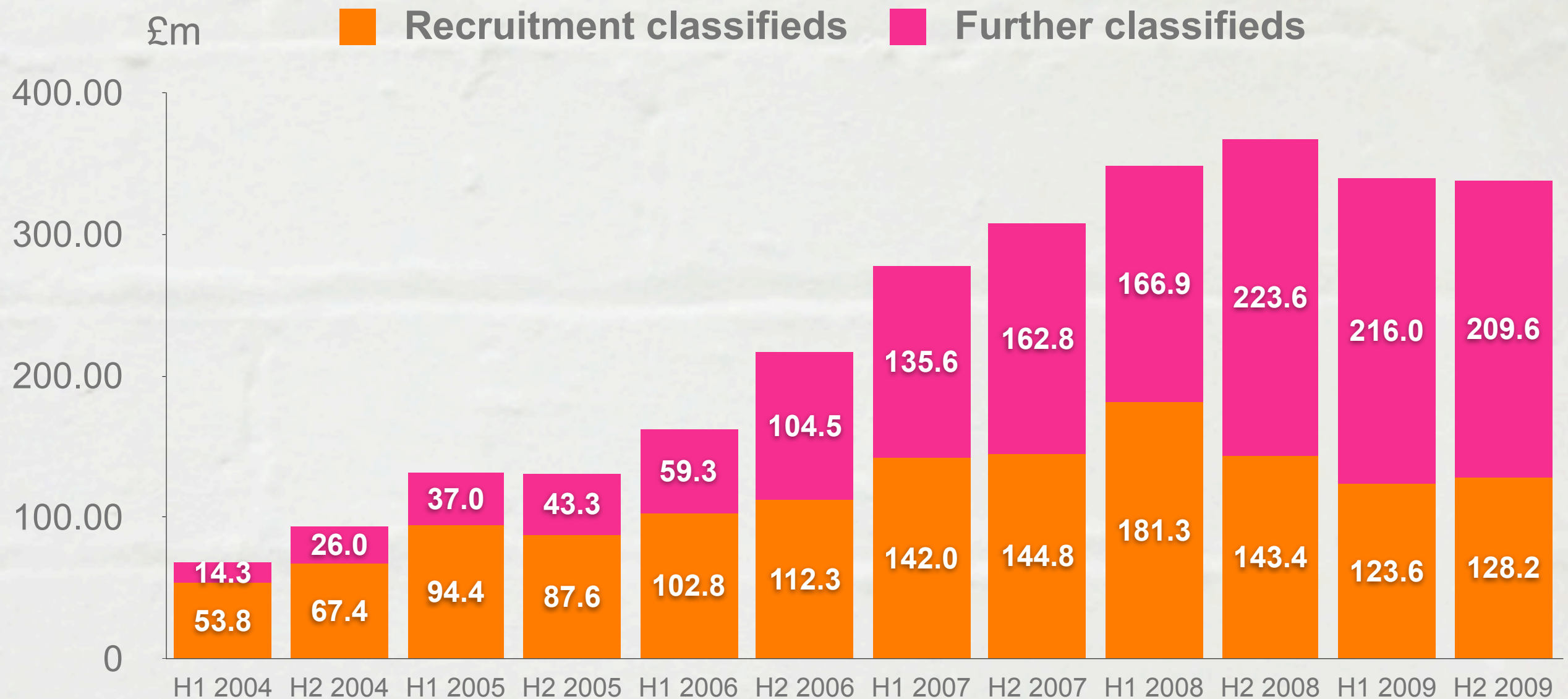
On a Like-for-Like Classifieds decreased by 5.3%



Source: PricewaterhouseCoopers / Internet Advertising Bureau / WARC

Tuesday, 11 May 2010

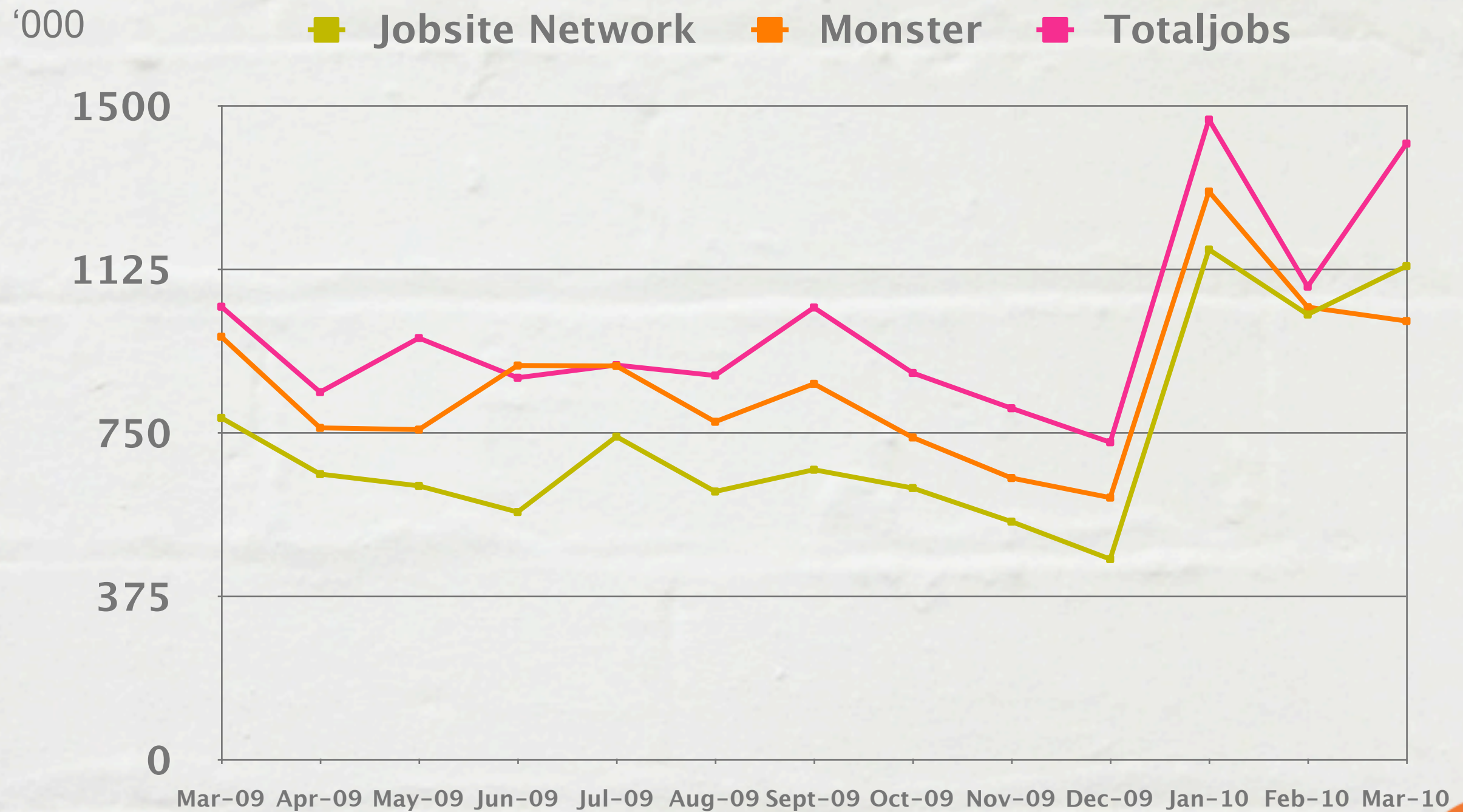
Classified market is stabilising



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



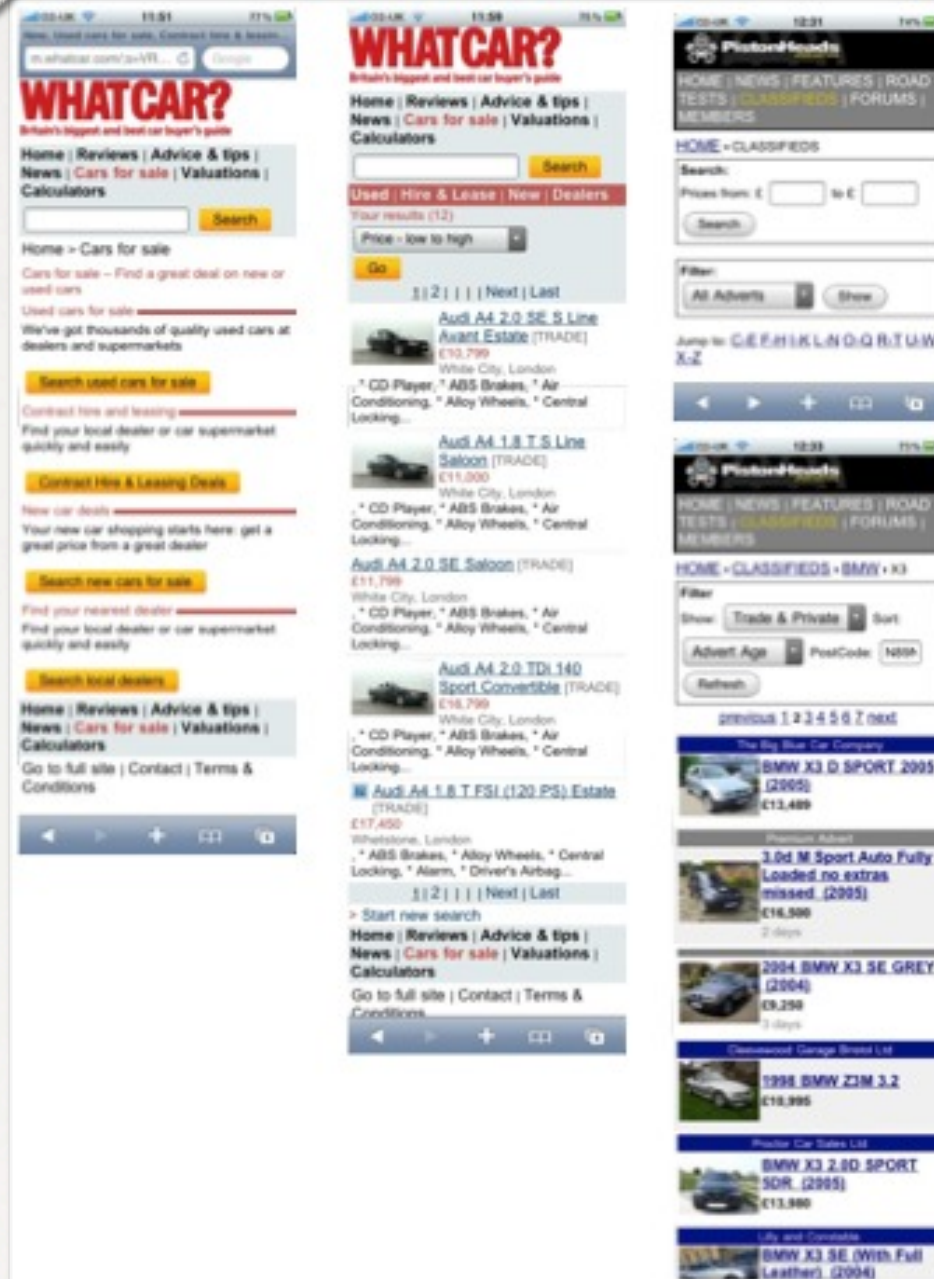




Source: Comscore GSMA/MMM



Traditional classified going mobile



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 [Publittweet](#) 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! #ashtag #ashcloud



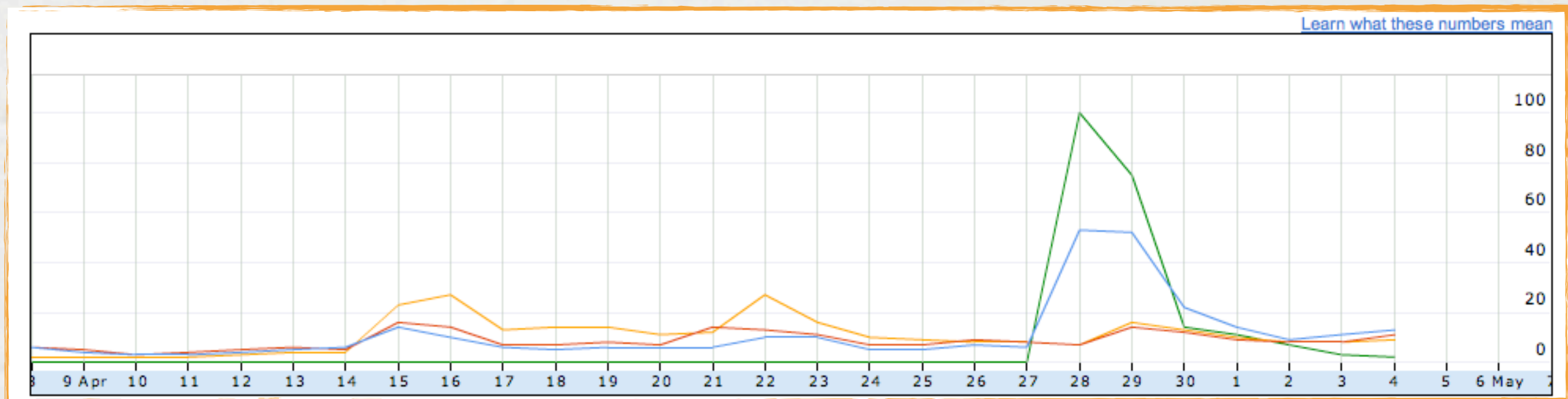
The Ash Cloud

about 3 minutes ago via web

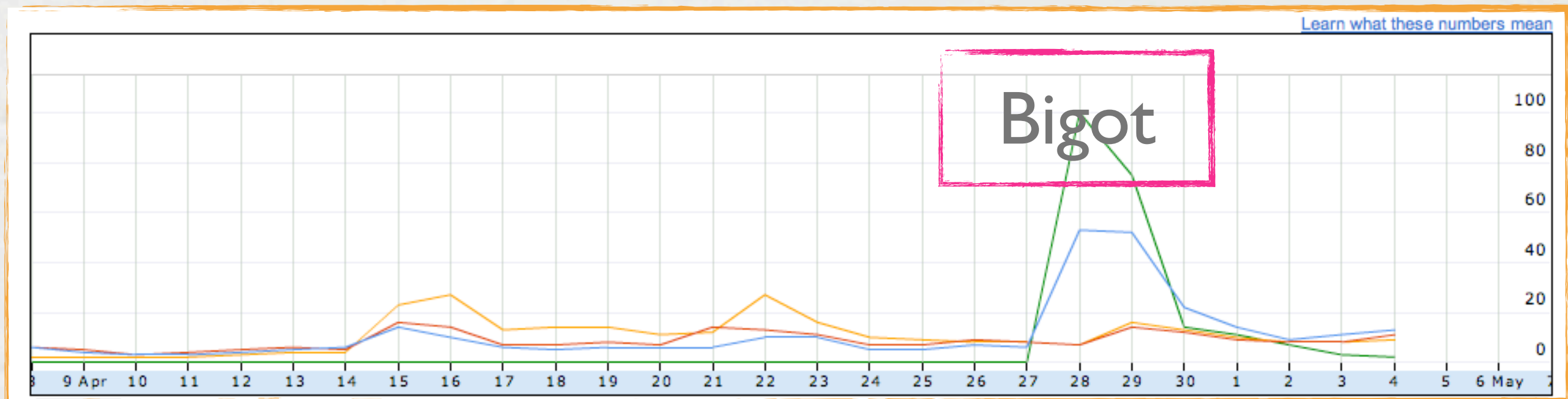
Now, this is 100% fun, obviously—but imagine an anthropomorphic account bent to a more serious purpose. Could you deliver important news about air travel in the voice of the ash cloud itself? It makes us think of accounts like [the Tower Bridge](#). There's something powerful about a first-person voice 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 [Advanced Search](#)
Search: ☒ the web ☐ pages from the UK

Web [Show options...](#) 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

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

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 »](#)



Rich, real term search


Google [Advanced Search](#)
Search: ☒ the web ☐ pages from the UK

Web [Show options...](#) 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

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

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 »](#)



Deeper engagement

Google [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](#): [@twitvoteuk](#) You may be interested in [#MayahsPoll](#) running during tonight's **Leaders debate**. If you want more info, contact me.

Twitter - 10 seconds ago




[Antoine Pouliot](#): last British **leaders debate** livestreaming on [bbc.co.uk](#)!

Twitter - 12 seconds ago




[Ros Clarkie](#): [@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

I hope that one of the **leaders** makes a terrible hung parliament pun. ... But he also knows it has upped the stakes for tonight's **debate**. ...



[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-...](#)

[All mentions »](#)



Deeper engagement

The screenshot shows a Google search results page for the query "leaders debate". The search bar at the top contains the text "leaders debate" and a "Search" button. Below the search bar, there are radio buttons for "the web" (selected) and "pages from the UK". The results are categorized under "Web > Latest" with a "Hide options" link. On the left side, there is a sidebar with links for "All results", "Images", "Videos", "News", "Blogs", "Updates", "Books", and "Discussions". Below these, there is a section for "Any time", "Latest" (highlighted with a red box), "Past 24 hours", "Past week", "Past year", and "Specific date range", followed by a "Reset options" link. The main content area displays several search results, each with a small profile picture, a name, and a snippet of text. The results include tweets from users like @twitvoteuk, @twitvoteuk, @twitvoteuk, @twitvoteuk, @twitvoteuk, and @twitvoteuk, as well as a liveblog from The Yorker and a live chat from GlobalPost. The "Top links" section on the right side of the page lists several news articles and blogs related to the "leaders debate", including "BBC News - Election 2010: Leaders prepare for TV debate on economy" and "Third leaders' debate - live blog | Politics | guardian.co.uk".

Google leaders debate Search 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:** @twitvoteuk You may be interested in #MayahsPoll running during tonight's **Leaders debate**. If you want more info, contact me.
Twitter - 10 seconds ago


 **Antoine Pouliot:** last British **leaders debate** livestreaming on bbc.co.uk!
Twitter - 12 seconds ago

 **Ros Clarkie:** @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
I hope that one of the **leaders** makes a terrible hung parliament pun. ... But he also knows it has upped the stakes for tonight's **debate**. ...

 **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

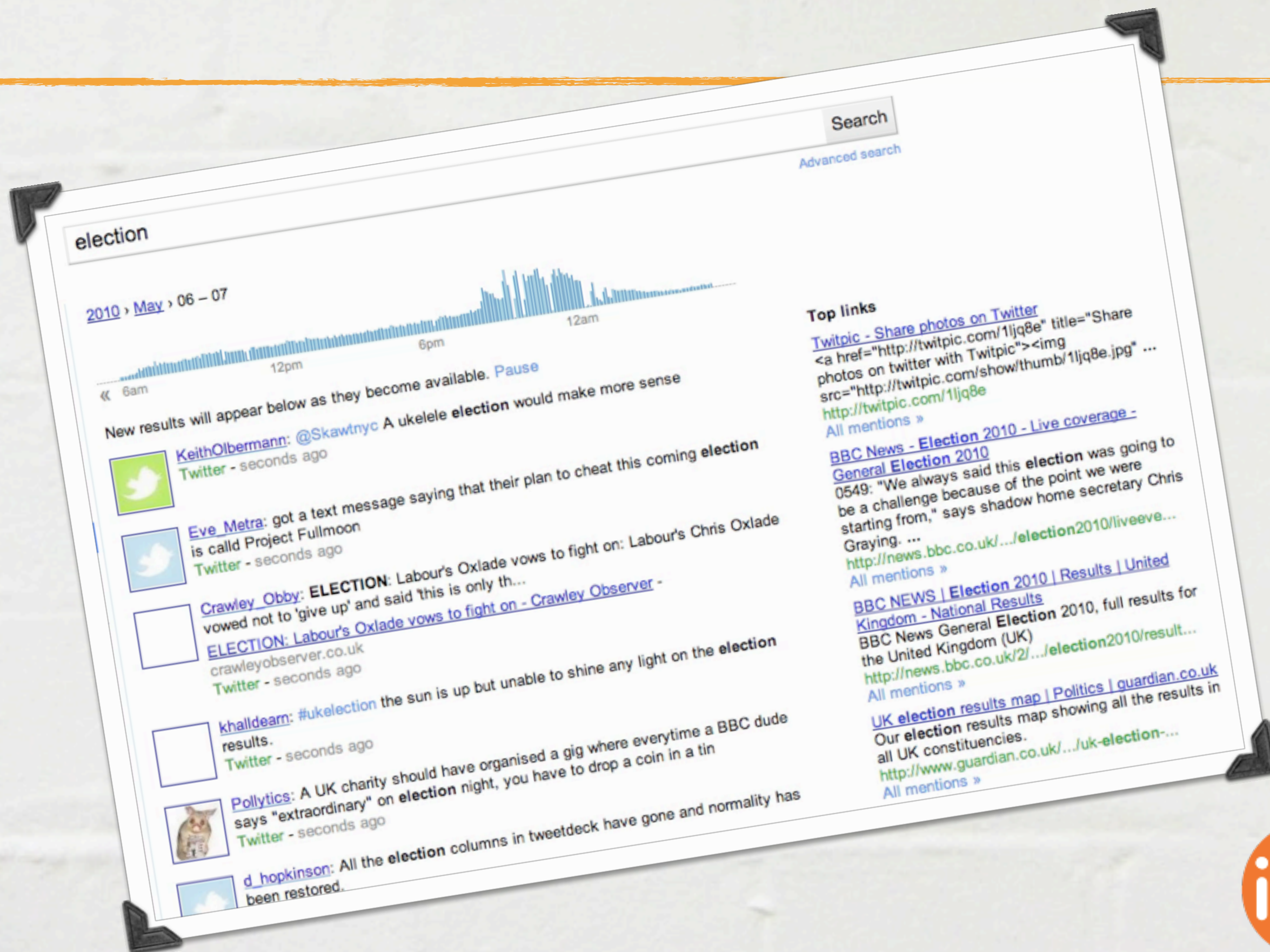
[Latest Updates on the British Leaders' Debate](#)
New York Times - 12 minutes ago
By ROBERT MACKEY We are watching Thursday's **debate** among the **leaders** of Britain's three largest political parties with one eye and scanning the Web for ...

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-...](#)
[All mentions »](#)



Real time



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

The screenshot shows the Twitter interface with the Twitter logo in the top left. Navigation links at the top include Home, Profile, Find People, Settings, Help, and Sign out. The main content area is titled "What's happening?" with a character count of 140. Below this is a search bar and a "Tweet" button. A "Latest" tweet is visible, followed by "Real-time results for ford capri" with a "Save this search" option. The search results list five tweets related to Ford Capri cars. The right sidebar shows the profile of user "kieronm" with statistics for following, followers, and listed. It also includes links to Home, Direct Messages, Favorites, and Retweets, as well as a search bar for "ford capri". At the bottom of the sidebar are sections for "Lists" and "Trending: London".

twitter

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

kieronm
246 tweets

65 89 1
following followers listed

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

Home
@kieronm
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 screenshot shows the Twitter homepage with the search term 'ford capri'. The top navigation bar includes links for Home, Profile, Find People, Settings, Help, and Sign out. The main content area displays a search for 'ford capri' with real-time results. A red arrow points from a tweet about a Ford Capri to an auction overlay.

What's happening? 140

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

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

kieronm 246 tweets
65 89 1
followers following listed

Bid now | Add to watch list

Ford Capri mk1 2000GT Salisbury Back Axle Escort Corsai

£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 hand yourself, consisting of friends, family, co-workers, sports teams, you name it.

New list

Trending: London
[Change](#)

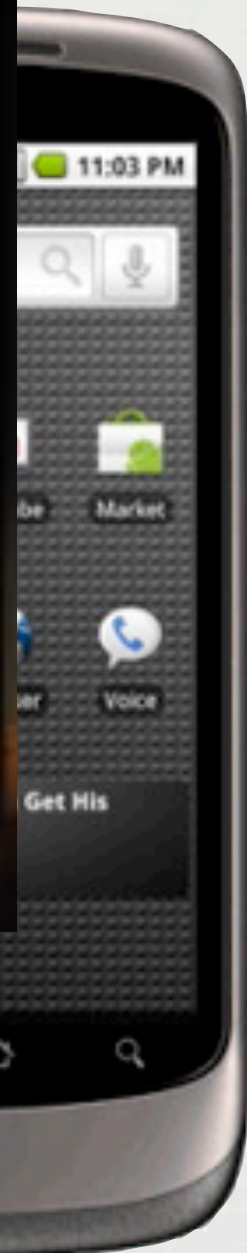
Lucho Barrios
#imvotingconservative



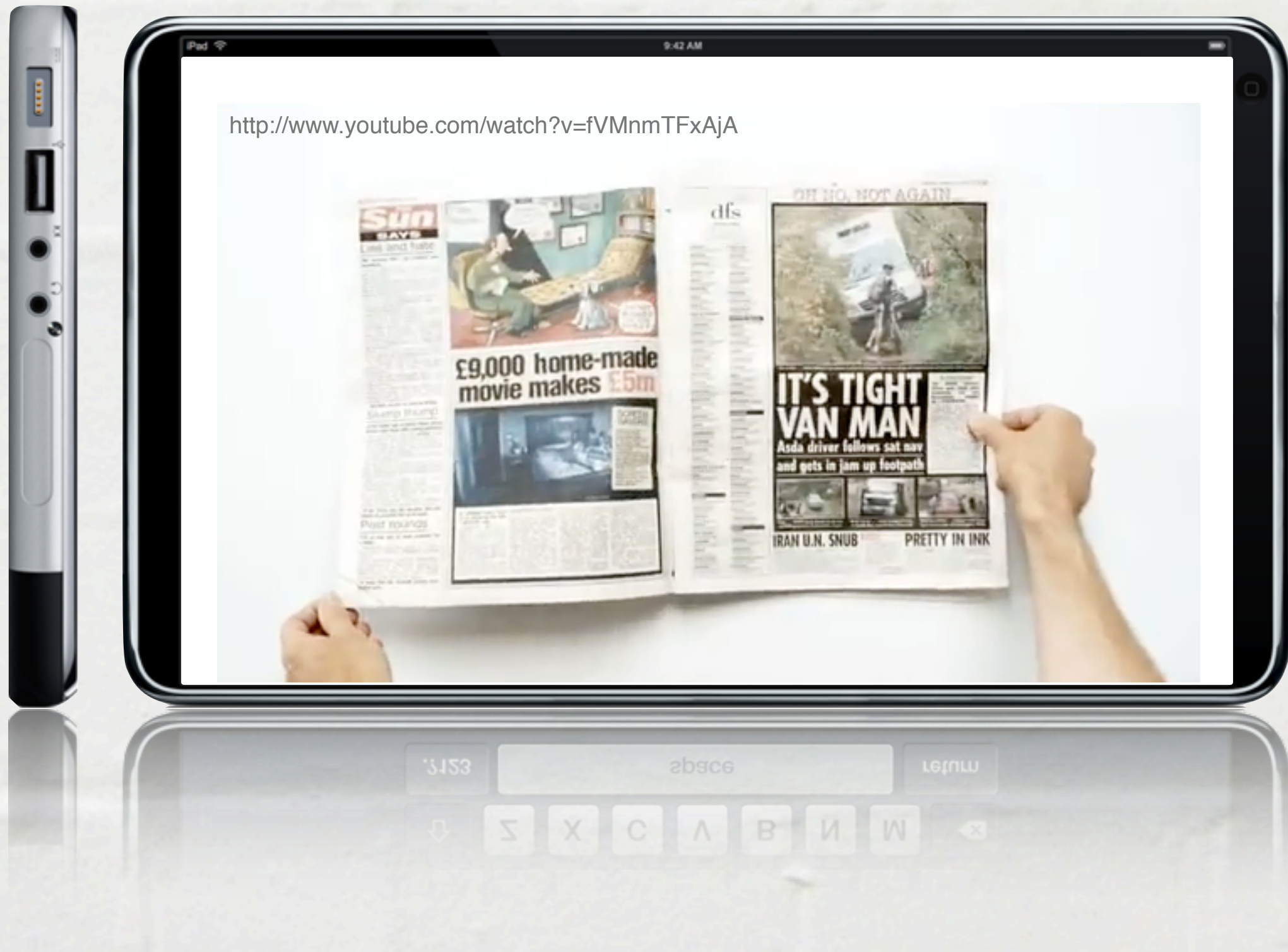
Smartphone ubiquity



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

#kieronm



Internet Advertising
Bureau www.iabuk.net