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Digital Consumer

Let's face it, print is dead.
Broadcast is on its way out.
The future is “on-demand.”

Hot Topics

- Online video (long-form vs. short-form)
- Mobile (next frontier)
- Social Media (focused, games vs. utilities)
- Search (and display ads)

Average person spends 1hr a day online. Web use is booming.

US Online Advertising Spending, by Format, 2008-2013 (millions)

	2008	2009	2010	2011	2012	2013
Search	\$10,691	\$12,285	\$13,880	\$15,552	\$17,686	\$19,530
Display ads	\$4,629	\$4,933	\$5,448	\$6,182	\$7,175	\$7,958
Video	\$587	\$850	\$1,250	\$1,850	\$3,000	\$4,600
Rich media	\$1,888	\$2,030	\$2,252	\$2,560	\$2,960	\$3,360
Classifieds	\$3,139	\$2,956	\$2,936	\$2,944	\$2,960	\$2,982
Lead generation	\$1,605	\$1,645	\$1,682	\$1,792	\$1,998	\$2,268
Sponsorships	\$590	\$514	\$542	\$576	\$629	\$672
E-mail	\$472	\$488	\$513	\$544	\$592	\$630
Total	\$23,600	\$25,700	\$28,500	\$32,000	\$37,000	\$42,000

Source: eMarketer, November 2008

The “New” New Media Consumer

- "New media consumers have been taught that they are in charge of what, when, and why they will pay attention to an ad message."
- "Today's consumers also want validation and reinforcement from other consumers - the opinions and testimonials of their peers are more important and impactful than the same words from a company spokesperson or message."

Source: iMedia Connection, 8 Golden Rules for Advertising in the Digital Age by Alan H. Gerson

Online Video

- More than two-thirds of respondents said they would focus their budgets on online video this year.
- More than one-half of respondents also expected to be implementing or extending an online video project in Q2 2009. Less than one-third said they were doing so currently.
- As ad-supported video grows (by 2013) long-form video will represent 69.4% of ad revenues, up from 41.6% in 2008.

Source: eMarketer, November 2008 - Diffusion Group study

Related Articles

- **FTW (Future of The Web) 2009: Digital TV**

<http://tr.imedia.os->

[0.com/rd/s/?encp=JkG4oEpdPnNk7UtDE3dw8HdH0EPqavJbw67SjJ2QOoM5E58%2BH2XEOw%3D%3D](http://tr.imedia.os-0.com/rd/s/?encp=JkG4oEpdPnNk7UtDE3dw8HdH0EPqavJbw67SjJ2QOoM5E58%2BH2XEOw%3D%3D)

- **Can TV and the web splice?**

<http://www.imediaconnection.com/content/21641.asp>

- **LG Expected to launch built-in internet TV**

--> <http://tr.imedia.os->

[0.com/rd/s/?encp=JkG4oEpdPnPvvtei%2FkH%2BxStOu%2BHtl%2FvfKvpzdXXhSayjPGek8aPimw%3D%3D](http://tr.imedia.os-0.com/rd/s/?encp=JkG4oEpdPnPvvtei%2FkH%2BxStOu%2BHtl%2FvfKvpzdXXhSayjPGek8aPimw%3D%3D)

Video to Mobile

- “(In 2009) Sixty-three TV stations in 22 markets reaching 35 percent of U.S. households plan to launch mobile DTV, providing live, local, over-the-air TV to next-generation devices equipped with the new capability.”

Source --> Big Push for Mobile DTV

http://www.adweek.com/aw/content_display/news/nontraditional/e3i8518735e98028c8be441e880cecd6416

Mobile is “So Fresh”

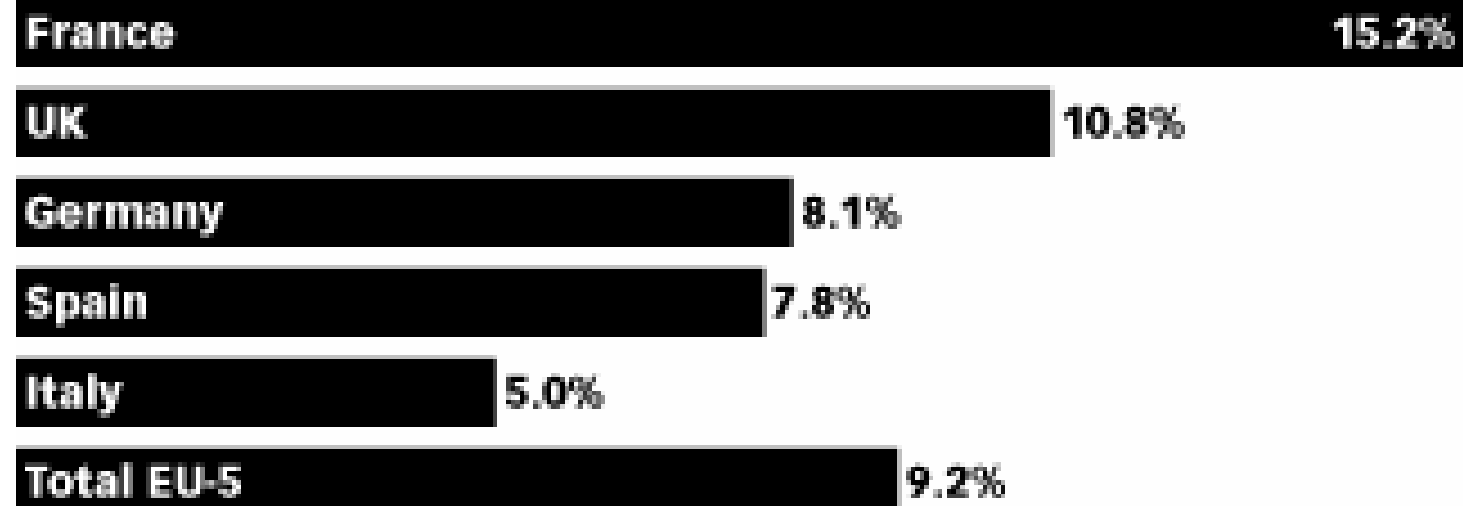
- Jump ahead of the pack with mobile ads

http://www.adweek.com/aw/content_display/news/nontraditional/e3i8518735e98028c8be441e880cecd6416

- 'Twas the night before mobile turned the corner

<http://tr.imedia.os-0.com/rd/s/?encp=JkG4oEpdPnMyi4tmHy%2FYO6JRUIItxnFgi2gtLpQRTOfltyAMGXCawg%3D%3D>

Growth of the Number of Mobile Phone Users in the EU-5 Sending MMS Messages, by Country, September 2008 (% change*)



*Note: three-month average for period ending September 2008; *vs. same period of prior year*

Source: comScore M:Metrics for Airwide Solutions, provided to eMarketer, December 17, 2008

Social-centric

- Focused Community Builders
- Utilities, Widgets, Tools
- Product placement
- Virtual worlds + valuable content =
successful advertising campaigns

Different Shades of Social

- Focused Social Networks Build Community

<http://www.emarketer.com/Article.aspx?id=1006836>

- Why social nets, gaming offer strong marketing platform

<http://r.smartbrief.com/resp/oghEuhfVyBxLohCibSufWDGp?format=standard>

- 4 brands that need a widget

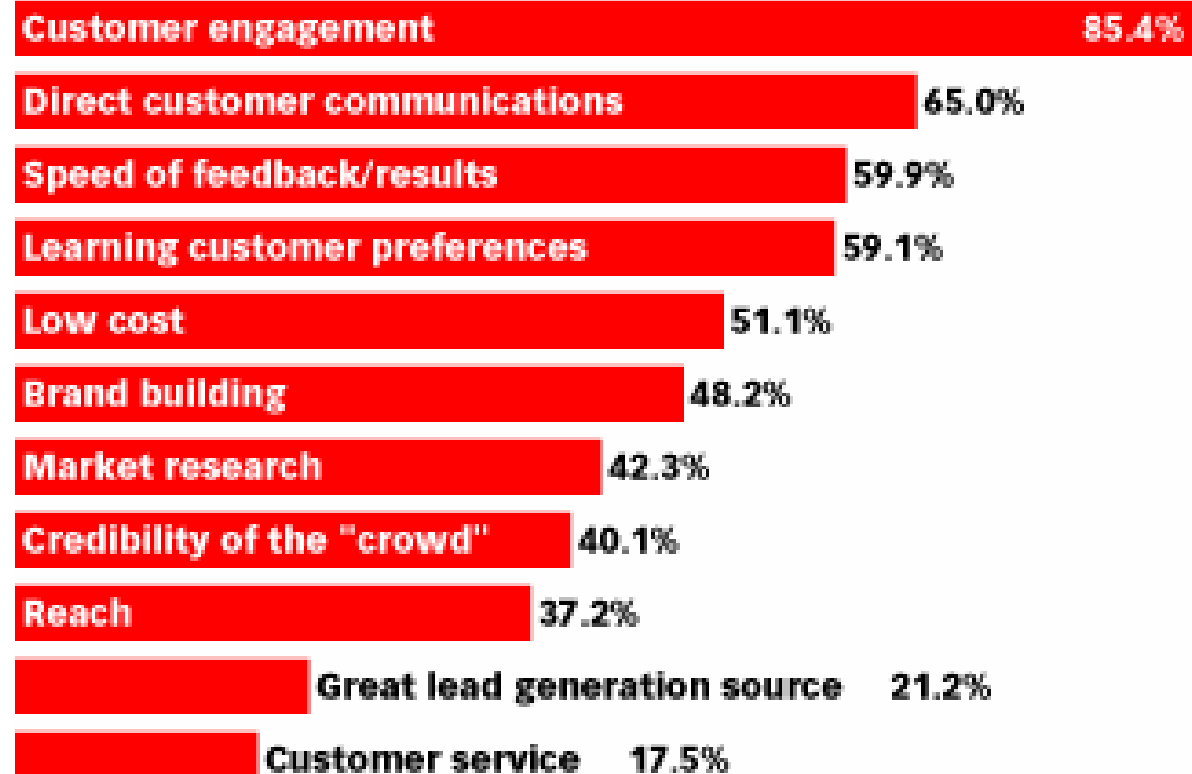
<http://www.imediaconnection.com/content/21523.asp>

- Kraft Gives Facebookers Reason to Share

<http://links.mkt1464.com/ctt?>

[kn=31&m=30811337&r=OTkyNTkxMjk4S0&b=0&j=NDQ2MjkyOTQS1&mt=1&rt=0](http://links.mkt1464.com/ctt?kn=31&m=30811337&r=OTkyNTkxMjk4S0&b=0&j=NDQ2MjkyOTQS1&mt=1&rt=0)

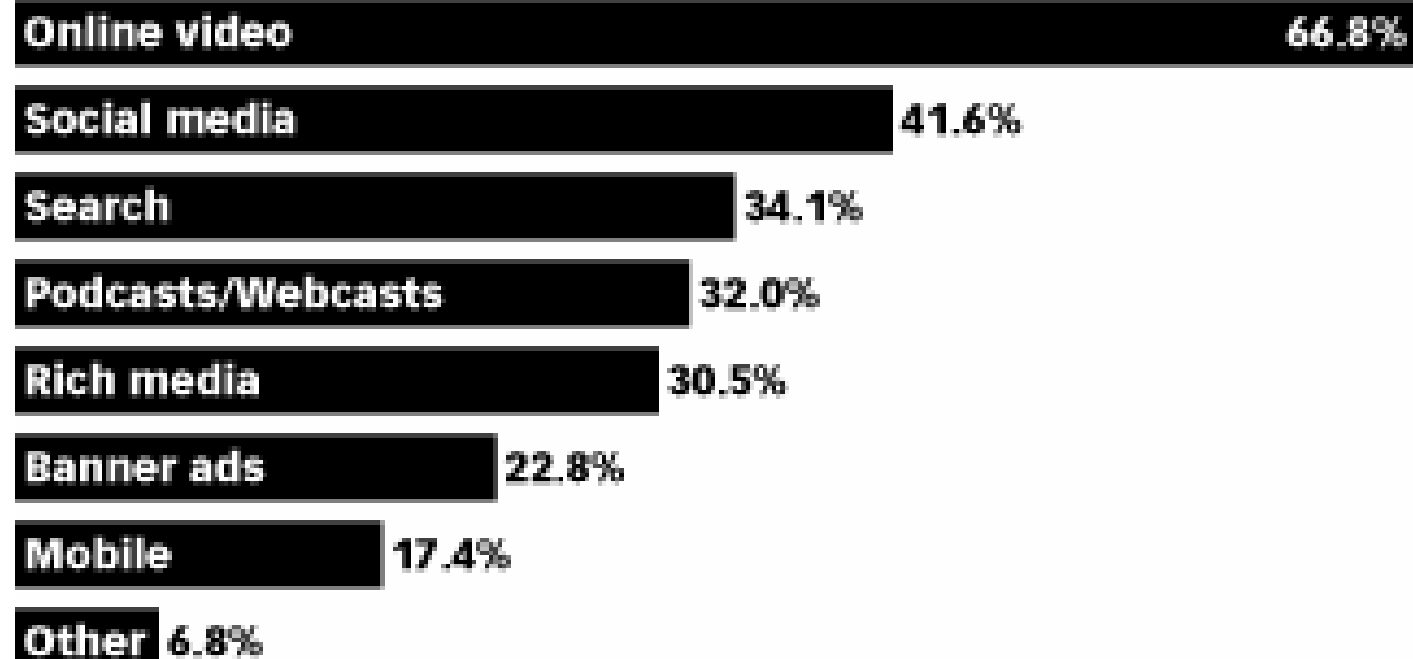
Main Benefits of Using Social Media Marketing According to US Marketing Executives, October 2008 (% of respondents)



Note: n=137

Source: Marketing Executives Networking Group (MENG), "Social Media in Marketing" as cited in press release, November 6, 2008

Tactics on Which US Marketers Plan to Focus Their Online Marketing Budget in 2009 (% of respondents)



Source: *PermissionTV, "Online Video Survey Results," December 17, 2008*

Human+Computer Aggregation

- User-generated content + aggregation = bling bling
- Paul Verna, Senior Analyst eMarketer, suggests a process that combines Techmeme with FriendFeed: real-time aggregation tools that combine algorithmic approaches with human input

What technologies are Ad Agencies seeking?

- Better tools/analysis of Reports and Metrics
- Efficiency in Operations
- Tools for rapid building (Sprout)

Geek-Out for '09, Web Technologies to Look Out For

- Identity management tools
- HTML 5
- "lifestreaming" apps like FriendFeed
- Firefox 3 and Google Chrome
- GPS-based location awareness services

source: Wired Magazine

Thanks!!!

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