



Internet
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Bureau
UK

Future Trends Working Group

Future Trends Volume 3:
Real time goes mainstream

Introduction

Andrew McIntosh, Head of Brand Strategy, Sky Media

In recent years advertisers must have felt like gourmands indulging in a never-ending taster menu, with wave after wave of enticing opportunities being offered to delight the eyes and tantalise the taste buds. Technology has been the main ingredient in this mouth-watering array, which shows no signs of abating.

Although many of these tasty treats have been served on a bed of online or with a tangy mobile relish, the forthcoming launch of Sky AdSmart later in 2013 is a linear TV offering, which sets it apart: a satellite dish, if you will. It represents a fundamental change in the nature of TV advertising, not just another amuse-bouche for advertisers.

For the uninitiated, I should explain that Sky AdSmart allows advertisers to serve different TV ads to different groups of households. It includes the ability to segment households using specified attributes, such as affluence or lifestage; advertise on a tightly defined geographic basis; and control campaign delivery with frequency capping and copy sequencing, for instance.

The articles in the white paper from the IAB Future Trends Council provide a neat summary of the weightiest issues we're facing as we look to the future of addressable, personalised and tailored advertising.

The IAB's Tim Elkington talks of "a balancing act...advertisers and media owners have to make sure people are comfortable with the level of personalisation of advertising." Dare's Nadya Powell urges every advertiser to rediscover the art of telling stories, and invokes the charming image of Big Sister whereby data is deployed enjoyably and for mutual benefit.

Carat's Dan Calladine highlights the blending of online and offline activity into one indistinguishable whole; and in a future-gazing variation of that theme, Initiative's Anna Watkins envisages simultaneous personalised ads via online and TV. And not least, Microsoft's Dave Coplin cautions against the presumption of precision, and speaks up for the slightly random, uncontrolled nature of our world.

Feast your eyes – there are plenty of fine words here, but of course the proof of the pudding is in the eating.

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A minority no more

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The year is 2020. Personalised, relevant advertising is everywhere. What started with the ability to serve relevant ads online to people based on their previous web surfing behaviour has spread to more 'traditional' media. Television advertising is fully personalised with commercial broadcasters delivering different ads to different households based on demographic makeup. When you walk through the tube station the posters show you different images depending on your mood and can even remind you of the items you looked at, but didn't buy, during your shopping trip. Radio advertising is tailored to reflect your listening habits and playlists and integrated with your social media preferences.

But what do people think about this? Have consumer attitudes developed at the same pace as technology? Time travelling forwards to conduct a focus group in the future obviously isn't an option, but fortunately there are some insights about how consumers are likely to view these developments that we can take from existing research.

The IAB and ValueClick conducted an extensive survey into consumer attitudes to relevant advertising and technology in 2012 and the results shed light on likely attitudes to the use of technology and tailored advertising in more 'traditional' media.

The research shows that people are very accepting of relevant advertising – 55% agreed that they would rather see advertising online that is relevant to their interests. There is also some evidence to suggest that this attitude is equally applicable to other media. Despite the obvious differences, people tend to think about advertising in different media in the same way. For example 48% said that they were happy to see advertising on TV channels, compared to 47% on retail websites. Some 43% said that they were happy to hear advertising on radio stations and the same percentage said they were happy to see advertising on search engines. The only real variation in these figures came with attitudes to more personal media with social networking sites scoring the lowest for the percentage of people that were happy to see advertising – 37%. This might suggest a note of caution when introducing more relevant advertising into very personal media.

The results also suggest that personalised advertising in 'traditional' environments could be welcomed. The most useful types of online advertising were found to be ads that provided offers (42% found this type of advertising useful) and ads that reminded people of products or services that they were interested in (30% found this useful). If you apply this principle off line then you could see that posters featuring coupons or special offers that related directly to the area that someone was shopping in would be welcomed. Equally, ads that reminded you about or gave you a special offer on an item that you'd considered buying in John Lewis but had placed back on the shelf, might be welcomed. After all, if John Lewis uses technology like Criteo to remind people of the items that they'd almost bought online then why not use the same principle outside the Oxford Street store?

Most of all, what shone through from the research is that people seem to understand the 'value exchange' between advertising and getting things for free – 55% are happy to see relevant advertising based on previous browsing behaviour if it means they can enjoy quality content for free. If you apply this principle to tube travel then you can see how people would be happy to see advertising relevant to them in exchange for content or a service – for example tailored digital tube posters in exchange for free super-fast WIFI. The tailored digital tube posters offer the media owner (in this case the tube line) the chance to monetise their audience (passengers) more effectively, and in return for this can offer the audience an improved and free service (WIFI).

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There is, of course, a balancing act in all of this and advertisers and media owners have to make sure people are comfortable with the level of personalisation of advertising. Step over the line in terms of the value exchange and you'll be sure to find out the hard way. One example of an ad funded model that could have pushed things too far was [Publicitair – the fictional ad funded airline](#), which allowed passengers to travel for free in return for constant ad exposure – including the 'we buy any car jingle' when going to the toilet!

But that aside most consumers appreciate the role that advertising plays and if it can offer relevant and useful information then they're likely to accept it, even if at first the personalisation opportunities offered by advances in technology might seem overly futuristic and intrusive.

No longer the preserve of online

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Real time advertising has seen a 112% year on year growth in the UK, 171% in Germany and 120% in France in 2012 (IDC) and Forrester forecast that 30% of all online ad spend will be exchange traded by 2017. It is a phenomenon that is here to stay.

The technology and terminology can create a fog of confusion, what with programmatic buying, addressable media, dynamic advertising, Ad Exchanges, Ad Networks, Demand and Supply Side Platforms; however the benefits for both brands and consumers are straight forward.

For brands, real time buying technology enables the buying of audiences at scale rather than specific site placements, driving down wastage and driving up cost efficiencies based on clear outcomes from a direct cost per acquisition through to a cost per engagement. As technology players, from agency trading desks to DSPs, become smarter in the use and aggregation of multiple data sources, from Experian through to retailer loyalty cards, brands can segment, target and then optimise performance based on real time results. Pricing is therefore based on the value of the audiences to a business, rather than the value of a placement to a media owner.

For consumers, real time advertising provides far greater relevance as they are served messages and then re-targeted based on their browsing history, purchases, preferences and the contextual online environment. The question of privacy and data protection still remains a thorny issue; however, consumers are increasingly aware of the value exchange: the provision of personal data for free content such as video on demand or a more personalised service, such as product recommendations through e-retail sites.

As more premium inventory sellers are signing up to Ad Exchanges or launching their own private exchanges, as did Facebook and ebay in September 2012, brands are increasingly confident about the quality as well as quantity of real time audiences. This combined with demonstrable results with up to 150% increase in ad effectiveness (IDC 2012), is driving the forecast RTB growth of 420% across Europe within the next 4 years (Forrester).

Real time advertising is no longer the preserve of online as traditional channels are now leveraging technology to create dynamic messaging. Channel 4's launch of the Prometheus trailer where viewer tweets were incorporated into the live advert has opened up a world of creative opportunities for brands.

The launch of Sky AdSmart in 2014 will enable brands to serve different advertising copy to different households across both Sky Player and linear channels broadcast via Sky+HD boxes in 2014. Targeting will be based on customer information such as postcodes, 91 new customer segments as well as third party data sources in effect delivering mass personalisation of broadcast media.

This ability to create dynamic messaging combined with broadcasters' increasing use of data to hyper target specific audiences heralds a new dawn for advertisers and their agencies. One can only imagine a future where traditional media channels move to a programmatic buying model and where personalised adverts are served in real time across both digital and broadcast channels.

Media becomes empathetic

Rohan Tambyrajah, Global Innovation Director at PHD/Unilever, outlines three key drivers that are helping media better react to consumer need in real time.

We are moving from an era of marketing where we made broad assumptions about consumers based on their claimed behaviour, to an era in which the real-time flow of data allows brands to make decisions based on how they are actually behaving. When required, this will give brands the means to create much more personal, relevant conversations on a one-to-one level and to tell stories that are enriched by relevance.

Central to this notion of 'mass personalisation' will be media's ability to derive sufficient understanding and meaning from the rich streams of signals and data that consumers give out, and not just from their online habits, but also from their behaviours in the real world.

Brands now have a greater clarity on *what* people are doing – every day we create 2.5 quintillion bytes of data - so much that 90 per cent of the world's data today has been created in the last two years. The real insight of course comes from *why* they are doing it in the first place. The old way would be to build this picture through research and focus groups that would quickly outmode. However in the real-time world, the impetus falls on machine learning and understanding to derive direct insight from the millions of micro interactions people have with media every day. Media in essence must become much more perceptive and empathetic, and gain the ability to react to consumer needs, in real-time and on a much deeper level.

Marketing to the consumer need state has always provided a direct route to relevance, and this in essence is the fundamental to empathy. There are three big and interconnected drivers that are helping media better react to need in real-time:

1 Sensors – the lowering barriers to connectivity of objects are making low cost sensors embedded into media formats of all sorts a reality. Various brands have trialled digital 6-sheets with front facing cameras that use facial recognition to gauge emotional state and tailor message accordingly. And start-ups like Ninja Blocks allow sensors to be tied to online actions with relative ease – for example motion sensors can be placed at your door and programmed to tweet whenever it detects motion.

2 Mobile and wearable electronics – Closely tied to this will be the rise of 'wearables', Nike's Cannes winning Fuel Band is still the best example we have today, but we are increasingly starting to see a whole new generation of technology emerge that is much more closely orientated to our form and adept at gathering and sharing data on everything from physical location to physiognomy. Apps like US retailer Neiman Marcus' NM Service interact with in-store sensors to alert shopping assistants of shoppers entering certain departments and then share their purchase profile to ensure they can have relevant conversations.

3 The Data Trail – The digital display space has long used methods of predictive analysis to attempt to pre-empt consumers' next moves and we are starting to see these methods spread to other media both digital and physical. As data streams become richer and more complex (big data), so do the algorithms that are able to draw value from them. Not least when looking at analyst Nate Silver's near perfect predictions of the last two US elections.

It is in the confluence of these three areas that we are likely to see a media landscape that is enriched by real-time data driven relevance. However more data does not necessarily equal more insight

The industry fall back point of reference for this sort of future has always been the film version of Philip K. Dick's *Minority Report*. I would argue that this errs toward the dystopian and the notion of a brand to consumer relationship based on that level of transparency would need to be predicated on a true value exchange that went beyond consumers giving up personal data in return for just relevant advertising. This creates an interesting tension, but it certainly is indicative to the shape of what may come.

Big Data just got explicit

Nadya Powell, Director of Social & Emerging Behaviour at Dare, describes how storytelling and Big Data can be used together to build more meaningful relationships with consumers.

To date the communication industry's use of Big Data has been small time. Used in frequently annoying or superfluous ways, the focus has been on maximising company profits to the negligence of the consumer.

First up, behavioural data. This has primarily been used to improve advertising effectiveness and has given rise to a plethora of specialist media agencies that use data to ensure advertising is even more targeted and even more specific. To date this has often misfired. For example, my husband once bought a TM Lewin shirt online, I did not, yet I am now pursued across the internet with adverts for men's shirts. It has also been used by deals and offers vendors assuming that because I once bought a friend a spa weekend, I now want one EVERY weekend. Just because behavioural data is available does not mean it should be used in lazy ways.

Social Data has led to communications becoming more 'personalised'. Initially this was exciting – early uses of Google Maps by brands such as State Farm meant you could see your street destroyed as opposed to Road X. But quickly this has tired – again just because Social Data is available does not mean it can be used repetitively and without imagination. If I see another poor mash-up using the Google map or Facebook APIs I will mash-up my computer.

Uses of Behavioural and Social Data will undoubtedly improve and become more and more sophisticated. But I would suggest that there will always remain a flaw at its heart. Behavioural and Social Data is collected and used passively, there is no explicit involvement from the consumer, and is instead based on a plethora of assumptions. It essentially takes control away from the consumer and puts it in the hands of the advertiser / media owner / content creator.

A useful comparison is perhaps that of the blind first date arranged for you by your best mate. Your best mate tells you all about the potential new love of your life. So you go fully prepped. But it goes horribly wrong. The assumptions you'd made based on the data you got second hand was wrong. You should maybe have picked up the phone and chatted to your date before the meeting.

So what could make uses of Big Data in the communications industry deserve the acclaim BIG? Well first off there is the much mooted Perceptive Data – building data profiles based on what you have observed about someone before and during their absorption of X media. This can be based on your social data, but more excitingly how you behave whilst you watch something. If the eyes widen with excitement, give them more. If the eyes lose focus and look away, give them less. Does this sound a bit Big Brother? Don't worry it is in early stages of R&D with BBC's Breaking Out radio play being one of the most lauded examples.

Ian Forrester of the BBC says Perceptive Media "takes narrative back to something more aligned to a storyteller and a audience around a campfire using internet technologies and sensibility to create something closer to a personal theatre experience in your living room."

So is this the Next Big Thing? I would suggest no. Once again this is implicit and passive. Making the assumption that because your eyes widen you love something, as opposed to simply having a memory or a thought about something else entirely.

So what is the Big Data Next Big Thing?

Well, first off, let's talk about story-telling. Much has been written within the communications industry about how in the new world economy where the consumer has power - every advertiser needs to rediscover the art of telling stories. The old model of shout loud doesn't cut it anymore, what does work are stories. They maybe short, they may not be told by a fire, but Felix's jump from space, Chipotle's film and the John Lewis ad - the good one with the little boy - are at their essence beautiful stories. So when thinking about how communications industries can best use Big Data perhaps we should think about how it can be used to best tell stories? This is where Explicit Data comes in.

Some very clever people at the research consultancy Latitude investigated what people want from stories. Four key themes emerged – each of which are individually fascinating. In summary, people want narratives that cross devices, play-out in real time and impact on their real lives. But most relevant to Big Data, they want to explicitly shape the story, and know the story has responded to their feedback. They don't want assumptions to be passively made and silently expressed – they want to be in control and drive the narrative collaboratively. This quote from Latitude's report 'The future of story-telling' brings this to life brilliantly:

"I want to friend Bond and his other MI5 pals on Facebook. I want to get up–dates, images and videos from 007 as he tracks down the terrorist, saves the world and gets the girl. The story would play out in real-time, so I could check in on him while I'm waiting in line at the bank, and offer him some advice just be–fore he rushes into a raid on the kingpin's hideout. But—and this is key—I don't want to be a voyeur; I want to be a participant. I want to really friend Bond, and have him call me by name and listen to my advice. I want to change the story based on how I interact with Bond and what's going on in my life."

So what does this mean for advertisers? Well if you looked at my behavioural and social data you would quickly know I like fashion and could serve me up ads for ASOS, TopShop and on a good day NetaPorter. But these ads would still probably be 95% irrelevant. If you talked to me, you would know that I like short dresses for nights out and more sensible dresses for work. I wear animal prints, stripes but never florals. I wear wedges not heels and the wedge needs to be not over 3 inches. Of course you could glean this behaviourally, but it would take time and very sophisticated algorithms. If we got deeper I could tell you I like this dress but would love to see it in gold, that I like to know which fashion trend it fits into and how I can mess it up. This cannot be gleaned by even the most sophisticated algorithm.

Back to my dating analogy. Since the beginning of time, relationships have worked best when they are based on honest and transparent conversations, not on part-informed assumptions. So the future of Big Data and brands? Let's use it to build meaningful relationships with consumers and collect explicit data in an enjoyable fashion for the mutual benefit of both parties. This isn't Big Data Big Brother, I like to think of it more as Big Data Big Sister.

Real time in the real world

Dan Calladine, Head of Media Futures, Carat Global Management, outlines some examples of where real time principles have been applied effectively to the offline world.

Part of the real time trend is that we're seeing more online data sucked into things previously thought of as 'offline' to offer live information and prices.

Bet365 now regularly runs TV ads during major football matches, where its spokesman Ray Winstone gives a recorded preamble, and then live odds are brought into the ad, directly from the company's servers. This is the sort of thing that would have been impossible a few years ago (and can still only be done in some countries), but gives the audience an up to the minute and far more compelling message than could have been delivered otherwise. The next step is personalisation of course...

Retailer Kiddicare does something very similar in store. The company, which has had a very active online presence for many years, as well as one physical store, has started to open physical stores in big retail parks. To combat showrooming (where people use their phones to make searches for the same or similar products and to do price comparisons in store), the company not only offers the same prices in-store as online, but has LED pricing units on the shelves, so that it can change prices universally - online and in store - simultaneously. Again it's all about getting the best and most relevant deal for the customer (but watch out for press articles about people who have found that the price for an item they've just bought has dropped!)

These two examples will be seen as very commonplace in a few years. Just as we now expect up to the minute updates from news providers at all times of the day, there is a clear benefit of being able to offer up to the minute prices in traditional environments like these.

A final example twists this on its head and shows how human intervention can be used to enhance real time results. Twitter recently revealed how it uses Mechanical Turk, Amazon's crowdsourcing marketplace, to verify and contextualise trending topics as they emerge. Twitter uses a real time computational system called storm to identify when terms suddenly start to rise in popularity, and then asks the virtual Mechanical Turk army to tell them what the terms refer to. An example is 'Stanford' that is a trending reference to the university, the football team, the hamlet in Bedfordshire and so on. This shows how even real time data, automatically sucked in, can need human intervention to make sense of it, when it doesn't fit precisely into set boxes.

The You Centric Web (Personalisation 2.0)

Dave Coplin, Chief Envisioning Officer, Advertising and Online, Microsoft UK, argues that in a world drowning in data, personalisation provides the only way for an individual to find and trust the information and services being provided.

We live in a world that is increasingly connected, with services that offer a degree of “personalisation” based on assumptions of our needs created on an extrapolation of our previous actions. As our digital footprints become larger and more connected, we are offered the potential to move to a new level of services that place us, rather than the services we consume, firmly at the centre of a web that is ultimately formed around the individual rather than the other way around.

Today, personalisation is an incredibly blunt tool. The services we use, the content we consume, the adverts we see are all provided on the basis of some prediction as to what we might be trying to achieve based on our past behaviours. However, it is not just that this prediction is currently extremely basic, it also does not yet fully take into account the rich, broad context that accompanies us wherever we are, whatever we are doing, a context that holds the key to creating services and experiences that offer us not just a precise reflection of the services we need but also positions us to make discoveries of incredible new content, products and truly human experiences.

As individuals, our actions are guided by a complex range of signals which we intuitively use both explicitly and implicitly. These signals form the basis for the services and content we choose to consume and influence the decisions and discoveries we make in everything we do. The You Centric Web is a place that is not just aware of this context, but brings it together and makes sense of it, delivering an overall experience that is truly reflective of us as unique individuals.

This context exists across four key dimensions that are real time, living states that change and shift as we go about our everyday lives. The four dimensions that influence our behaviour are:

Emotional – my emotional state. My current emotional level will influence the decisions I make and the services I’m looking for. For example the music I select when I’m happy may be different from that which I select when I’m less so.

Social – who is with me physically and my virtual social connections. Watching a sports game or a movie with friends is a different experience to watching it alone or connected to others remotely for a shared viewing experience. Equally, the context of what my friends do is also a powerful signal that provides a trusted source of influence that may be incorporated to help me make my decision.

Environmental – where I am, the device I’m using, the time of day, the temperature, my location, my direction of travel, the current weather and so on. Each of these factors plays a role in influencing both my decision and equally inferring the intent of my actions. Searching for “sushi” on my mobile device at lunchtime while walking down a street in the centre of town will likely be for a different purpose than if I were to search for it sat at home in the evening on my main home computer.

External – This represents a broad range of external factors that offer further contextual signals that may influence my actions and decisions. For example, a significant societal issue (like the recession) or a nationwide campaign on childhood poverty (or global warming etc) may make me consider different choices about the activity, actions and content I pursue.

These four domains are joined together and under-pinned by a rich pool of historical evidence about previous actions which can serve to highlight a likely (but not certain) outcome for any given decision or choice.

The connection of these different dimensions of context has been impossible in the past as not only did we lack the ability to accurately capture and interpret our current state in real time, we also lacked the ability to join them all together and analyse them as a collective. In a world of socially connected experiences, big data, cloud computing and natural user interfaces this really starts to change.

Using natural interface technologies, we are finally able to start to capture and use much richer information about the emotional, social and (some of) the environmental factors that will influence my activities. As they continue to evolve, devices like Kinect will help understand our emotional state, the environment we're sitting in and who is with us. Early examples of this have already been shown, but we know it is still early days and the technology still has much further to go before this is pervasive and usable across a variety of services.

In addition to the technological developments described above, the increasing capability to connect and analyse vast, disparate data sources starts to provide the opportunity to take a broader "systemic" view and a deeper level of insight that can be used to infer further elements of the context surrounding an individual. In this area, the brave new world of "Big Data" and the cloud becomes an immensely powerful capability that offers the potential to provide incredible new context and insight that can be used to shape experiences even further. My favourite example of this was some recent research done in the US that analysed cellphone usage data from 50,000 individuals and was able to accurately predict the future location of any given individual with 93% confidence. (And there I was thinking I was in control.)

By joining up and effectively understanding this broad, rich context, it becomes clear to see how basic today's world of personalised services is and just how far we've yet to go. Being told that "people who have bought product A also bought product B" is no longer going to feel useful or even relevant.

However, beyond the further technological innovation that will be required to make this a reality, there are also several advances in how we as a modern society think about, use and trust the services that will be required if we are to get to a point where we can really maximise the potential of this world that is moulded around the individual. In particular, there is a growing trend of a fear of "over personalisation", a world full of filters and "popular content" which is devoid of discovery and one in which the power (and importance of) serendipity becomes increasingly hard to come by.

The common mistake being made that drives this fear is to think that personalisation by default excludes discovery, or that perfect personalisation means ultimate precision. This is a world where I am precluded from finding new things which I am unaware of or from uncovering new items which may not be considered relevant to my interests. In many ways, the You Centric Web must represent the slightly random, uncontrolled nature of our human world, injecting random and unrelated content in order to broaden and extend the overall experience and introduce new direction and insight. In some ways, this is no different to the role a good news editor plays in ensuring that the audience receives a broad range of content that is of interest to the majority along with an essential range of content that is intended to interrupt and disrupt your established areas of interest – a process that not only broadens the mind, but equally expands the potential for new discovery and conclusions (and the adjacent possible).

In a world drowning in data and information, personalisation provides the only way for an individual to not just find, but most importantly, to trust the information and services being provided. Trust is key here, not only does the consumer need to trust the services, they increasingly need to be able to trust the service provider, to know that their data and information about themselves is respected, kept private unless the consumer has indicated otherwise.

We need to recognise that our society continues along a long established journey about privacy that is not new in the information age, it has in fact been an issue for discussion and debate for hundreds of years. The information age accelerates the pace of change, but the basic principles remain the same for the individual. I need control, I need transparency and increasingly, I need a tangible value proposition (i.e. what do I get in return).

These principles, offer us a way forward. By putting the individual in control of their data, being transparent about how the data is being used and crucially being really explicit about the value that will be provided we can turn around some of the “trust issues” that we read about so frequently today.

The You Centric Web offers an inversion of today’s web, placing the user at the centre and in full control of the overall experience. It promotes discovery, celebrates serendipity and offers a personalised path through the oceans of data, content and experiences that the modern digital society has to offer. The technology required to deliver the You Centric Web is beginning to appear now, but we have further to travel before it can reach its full potential. As a society, we will have to shift our expectations of how the digital world can augment the physical world and service and content providers will need to plan for and deliver on the potential of this connected, intensely personalised world as well as work hard to win the trust of consumers by placing them at the centre and protecting and respecting their rights. The You Centric Web is an inevitable part of our technological evolution; it is now down to all of us to ensure we are able to take up the promise of everything it has to offer.