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Guerrilla video: Why and how web video will change the fabric of the web

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Abstract

The paper discusses why video imbedded into websites will be one of the most significant developments in online marketing. The paper explains the developments that have enabled the explosion in web video to occur and the opportunities it creates for marketers. The paper investigates how web video is likely to evolve during the next 24 months and highlights the potential dangers if it is used in an indiscriminate way.

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Introduction

When asked which of the new digital technologies most excited him, Olaf Czeschner, Avenue A| Razorfish's chief creative officer, answered: video content.¹ He continued: 'Stories can be told in a never-seen-before way and involve users in a thrilling dialogue with brands'.

In the same way that GIF and JPG images added richness to simple textual content, video provides a new dimension to the web's ability to communicate and entertain.

The web video revolution has only just begun but its impact on the internet is staggering.

According to CacheLogic, a content delivery network services provider, over 60 per cent of internet traffic currently consists of video applications such as television shows, YouTube clips and animations. Hui Zhang, a computer scientist² at Carnegie Mellon University, believes that this figure will rise to 98 per cent within two years.

One company, YouTube, accounts for 10 per cent of the internet's entire bandwidth. Cisco estimates³ that YouTube attracts 6.2 million daily visitors, downloading 120 million video streams.

Already the US has 135 million monthly viewers of online video⁴ with 24 per cent of the US internet population watching online videos at least once a week.⁵ Astonishingly, most marketers are not aware that web video is re-writing the rules of their online strategies.

This paper investigates the causes of the web video revolution, how marketers can harness its power and the ways in which web video may evolve in the future.

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The book *Guerrilla Marketing*⁶ described unconventional, low budget, ways of executing marketing activities. The revolution in web video has all of the same characteristics. For this reason, it seemed appropriate to title this paper *Guerrilla Video*.

Birth of online video

Why the rules of web video have changed?

In May 1993, an 85-min-long movie called *Wax — the Discovery of Television Among the Bees* — was converted to black and white and transmitted over the internet. Online video had been born. The film's audience was mainly academics as these were the only people with the necessary computing and communications technology. Now the video is available for all to see on YouTube.⁷

A dozen years later the combination of three sets of innovations resulted in online video becoming available for the masses.

Simplicity and reduced cost of creating video

Video cameras and editing software have benefited from the same decline in the cost and improvement in performance that has affected all types of digital technologies.

For less than \$1,500, you can buy a suite of professional video editing software. The camera used to record the Oscar-winning *An Inconvenient Truth*, Al Gore's global warming crisis documentary, cost less than \$4,000.

For less than \$1,000, an enthusiastic amateur video maker can buy a camera and editing software that will create good-quality videos.

Reduced costs and greater speed

Video filming is now faster, more flexible and closer to a reportage format, but without loss of quality or authority in the final product.

Clients benefit from this streamlined way of making video. Videos are created faster and at less cost.

Compared to the old 'corporate video' productions, costs are drastically reduced, without losing the quality and authority required to pass on a precise and efficient message on behalf of the company. Equally important is the fact that a more natural and personal creative sequence/programme can be produced to portray the brand or product.

Broadband

No broadband, no web video. As long as most people's access to the web was limited to dial-up speeds then web video was only relevant to large corporates and those with access to broadband and the willingness to pay the high connection charges.

Driven by regulatory pressure and market forces, the telcos and cable companies have rapidly expanded the geographic coverage of their broadband access, reduced the charges and increased the speed of transmission.

There is now a worldwide audience of 285 million subscribers who can access the internet at broadband speeds.⁸ This number is expected to double by 2011.

The demand for web video and broadband access are now in a virtuous circle whereby broadband take-up is being driven by the desire

to view video, which in turns increases the audiences and supply of video material.

Radical changes

Simplicity of viewing, finding and hosting video

During the past three years, the way in which video is viewed on the web, the way it can be found on the web and the way it is stored on the web have all radically changed.

Web hosting

At the last count, there are 80 websites⁹ providing video hosting services. This number has doubled in the past year. Most of these make no charge for their services. In addition to providing a free service, the technical complexity of uploading a video is comparable with purchasing a book from Amazon.

Not surprisingly, free and simple web hosting has stimulated a huge amount of video content. In June 2007, YouTube had stored somewhere between 25 and 60 million video clips.¹⁰ In August of 2006, the figure stood at 6.1 million.¹¹

Video hosting costs nothing, is simple to use and is no barrier to any organisation using web video.

Search

Three developments have occurred to make it easier to find video on the web. From the marketer's perspective, these developments provide new ways of targeting video to specific audiences.

- Google is expanding its video search capability with the development of 'universal search'. This will give users a single, integrated set of search results providing links that are a mix of word, image and video content.
- Blinkx¹² is a company that creates a searchable index of web videos by using speech recognition and video analysis software. Currently the company has over 12 million hours of searchable video and more than 130 media partnerships.
- Social bookmarking websites like del.icio.us (part of Yahoo) and Digg¹³ are making it easier to find and share knowledge about videos (and all other types of content).

Viewing and listening

One of the largest barriers to achieving a mass audience for web video was the need for users to download software (a plug-in) to enable their computer to play the clip.

Adobe's product, Flash player, has become the default software used by the main web hosting companies, including YouTube and MySpace. Adobe estimate that just under 99 per cent of world's developed markets can view Flash Player content.¹⁴ This implies that over 750 million computers worldwide are Flash Player enabled.

Sound facilities is the final component needed to enable computers to play video. It is rare for any new PC or notebook computer to be sold without multimedia capability.

We will never reach the point where a 100 per cent of domestic and office computers are video-enabled. We have reached the tipping point where computers, without video capability, are destined to become the exception.

The 'YouTube effect'

Growth of YouTube

YouTube has had both a positive and a negative impact on the evolution of web video.

The positive effect has been to propel web video into the general public's attention. This has not always done in the most appealing way. Saddam Hussein's death, the unguarded statements of politicians and the rantings of celebrities have quickly found their way onto YouTube, often before they were broadcast on television.

YouTube has thrust web video into the public spotlight but often with the connotations of it being trivial and a faddish thing that is only used by the young.

The negative outcome is for marketers to pigeon-hole web video as being another part of this strange 'Web 2.0 thing' and only relevant if you are targeting the tween and teen markets.

The assumption that only teenagers are interested in web video is not supported by the facts. According to data compiled by Nielsen/NetRatings, comScore and Quantcast, web users aged 35–64 represent anywhere between 48 and 65 per cent of YouTube's audience. The average age of US users is estimated at 39 years.¹⁵

Maybe it is symbolic that YouTube decided to use a video recorded by an 80 year old to launch its UK website.¹⁶

The 'YouTube effect' has:

- Publicised and simplified the use of web video.
- Provided free video hosting.
- Enabled video to be easily incorporated into websites and blogs.
- Provided the tools that enable video content to be targeted at specific markets.

Long after YouTube has been absorbed by Google, its effect in enabling the Guerrilla web video revolution will still be felt.

Marketing applications of web video

Marketing applications

Videos created by users, rather than companies, are expected to account for 55 per cent of all web video watched in the US by 2010. Currently the figure is approximately 50 per cent.¹⁷ This is explained by the exponential increase in the volume of user-generated content (UGC).

This means that marketers must learn new skills if their corporate video content is to achieve visibility. The largest challenger for capturing customer attention comes from UGC, not from a company's competitors.

The objective for marketers must be to harness and direct the creative resources of customers and potential customers to create video material that supports their marketing campaigns.

Two main uses of web video

Currently, there are two main ways in which companies are using web video with their marketing campaigns.

Extend (or substitute for) traditional advertising

Extending or substituting for traditional advertising is by far the largest use of web video.

Unilever's use of the technique to promote its Dove beauty products is an excellent example of how video provides a relatively inexpensive, but very powerful mechanism, to build brand awareness. Dove's video, the 'Evolution of Beauty',¹⁸ has become one of the most popular clips on YouTube and other content-sharing websites.

Another example of this technique is the 'Midlife crisis retreat' campaign used to promote the Volkswagen Passat car.¹⁹ This is one of the first viral uses of video that enables the content to be customised by the sender.

These are examples of using web video to substitute for traditional advertising. Most companies either do not associate web video to their traditional advertising campaigns or limit the connection to making their television advertising available from the corporate websites.

One company that understands the power of the media is Unilever. The company's senior vice-president, global marketing services, told the FT: 'It can be misleading to look at just our media expenditure, because a lot of the value we get from the digital world is essentially free or almost free'. This comment was made about Unilever's use of web video.

Online video advertising

Using video to advertise on websites is an evolution from static and animated banners. The objective remains the same: to stimulate click-throughs and raise brand awareness. These objectives are applicable to both B2B and B2C companies.

Research from the US Online Publishers Association (OPA) suggests²⁰ that video is an effective format for achieving these marketing objectives.

The study found that approximately 80 per cent of all video viewers have watched a video ad online, and 52 per cent have taken some sort of action. This action might be visiting the website (31 per cent), searching for more information (22 per cent), visiting a store to look for the product (15 per cent) or making a purchase (16 per cent).

In addition, the study found that if a consumer has a positive attitude towards an advertised brand, and liked the video content, the brand consideration jumps 61 per cent. If the consumer's initial attitude toward the brand is neutral or even negative, brand consideration still rises 21 per cent.

The results from the OPA are reinforced by another study conducted by Dynamic Logic. Based on a hundred video ad campaigns, it was

Video an effective format for achieving marketing objectives

Not all web video advertising is effective

found that the advertisements generated an average increase in awareness of 18 per cent.²¹ This is 10 per cent above the norm.

Figure 1 compares the point differences between people who saw video ads and those who did not and shows that video advertisements create a higher performance in all measures of advertising effectiveness. This is not to say that all web video advertising is effective. A poorly created web video advertisement does not guarantee success any more than a poorly constructed banner advertisement.

In addition to improving the effectiveness of advertising, marketers are finding other applications where web video adds value to their marketing activities.

The examples in Table 1 are not a comprehensive list of applications but do illustrate the diverse ways in which web video can be used in the marketing environment.

Each of the following examples in Table 1 contains a URL for viewing.

Guerrilla video affects more than the marketing function

Web video can be used in applications other those managed by the marketing department. Human Resources and Investor Relations are the two groups most likely to benefit from video’s power of communication as illustrated in Table 2.

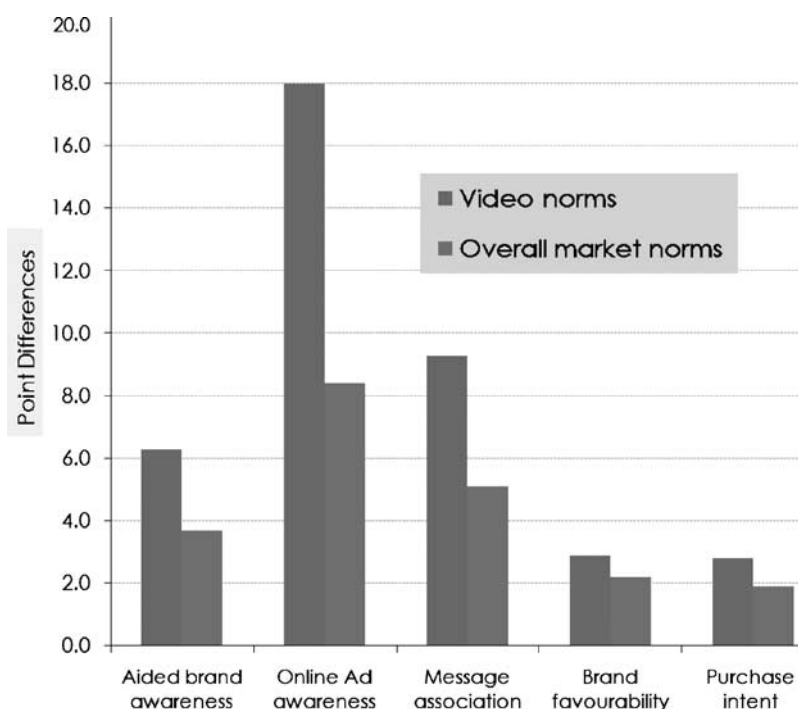


Figure 1: The difference between the exposed and control percentage (*the point difference*) for video and other advertisement formats
 Source: Dynamic Logic

Table 1: Practical uses for web video

Using video to supplement text and images and to extend the richness of the information provided to customers	
Examples	
Ocado is a supermarket service in partnership with Waitrose. Its website contains recipes listing ingredients and video showing how to prepare the meal. After watching the video the ingredients can be added to the shopping basket with a single click.	http://tinyurl.com/ys7ft6
Lonely Planet has created a new website enabling travellers to display their videos and supplement the textual information provided in the company's publications.	http://www.lonelyplanet.tv
The BBC has added 100 interactive recipe videos to the cooking section of its website using celebrity chefs.	http://tinyurl.com/23dz5d
The Newsroom is a new breed of company that provides video material that can be integrated into corporate websites.	http://thenewsroom.com/
HowTo.tv , as its name suggests, provides video material to help people with specific tasks. Companies involved in the venture are Vodafone, sponsoring video about using mobile phones and Wickes with videos about DIY tasks.	http://www.howto.tv/
Martha Stewart's re-launched website incorporates over 700 videos, including daily episodes of Stewart's TV shows and 'how-to clips'.	http://tinyurl.com/34dl6
Using video to provide a radically new way of communicating with potential customers	
Examples	
Simon & Schuster has launched a video-based website that provides in-depth interviews with authors.	http://bookvideos.tv/
The Chartered Institute of Marketing , in partnership with a video production company, created a video-based website providing news and interviews about marketing.	http://www.wnim.tv
Google has created a 'talk show' channel on YouTube where the company's representatives interview political and business leaders in the US (eg Hillary Clinton, Michael Bloomberg, John McCain).	http://tinyurl.com/33orgd
O2's Marketing Director and Microsoft's Mobile Ambassador have both featured in videos on the ShinyShiny.tv which is titled: 'A girl's guide to gadgets'. This demonstrates a very informal and 'youthful' way of communicating with potential customers.	http://www.shinyshiny.tv

Table 1: Continued

Using video to convey complex and/or difficult messages	
Examples	
Comparing products is a difficult task to complete online, especially for complex products. DriverTV is a video website that provides standardised video demonstrations of all the leading US cars.	DriverTV.com
Delicate and emotional subjects. The Multiple Sclerosis Association of America (MSAA) has launched a series of videos discussing the disease, its diagnosis and treatment.	http://tinyurl.com/2ezuh5
The Florida Health Department used a video-based microsite to educate people about the need to wash their hands	http://www.5thguy.com/
High impact information. London's free newspaper (thisisLondon) used video to expose its rival (thelondonpaper) exaggerating its distribution figures.	http://tinyurl.com/2yb44x
Personal issues. The world renowned Mayo Clinic provides a library of Web videos about health-related issues.	http://tinyurl.com/2gpsno

Table 2: Business functions and video applications

Business function	Application of video
Recruitment	To show the reality of working for the company and insights from other employees.
Corporate social responsibility	To add life and meaning to the corporate CSR policy.
Investor relations	Used to enrich PowerPoint presentations with video commentaries. Interviews with senior executives on key topics.
Internal communications	Used to enrich the intranet's social networking facilities — announcements from senior staff — displaying video news about the industry, customers and competitors.
Knowledge transfer	To record the knowledge of past employees in a way that is accessible by future staff.
'How to'	In the same way that web video can enrich 'how-to' applications on the market-facing domain of the website, it can also deliver the same benefits when used on the intranet.
Training	The principal role of web video is as a means of reminding and reinforcing the key elements of previously attended face-to-face training sessions.

Guidance for marketers

The following seven statements are a mixture of facts and guidance that will assist marketers to maximise the benefits when using web video.

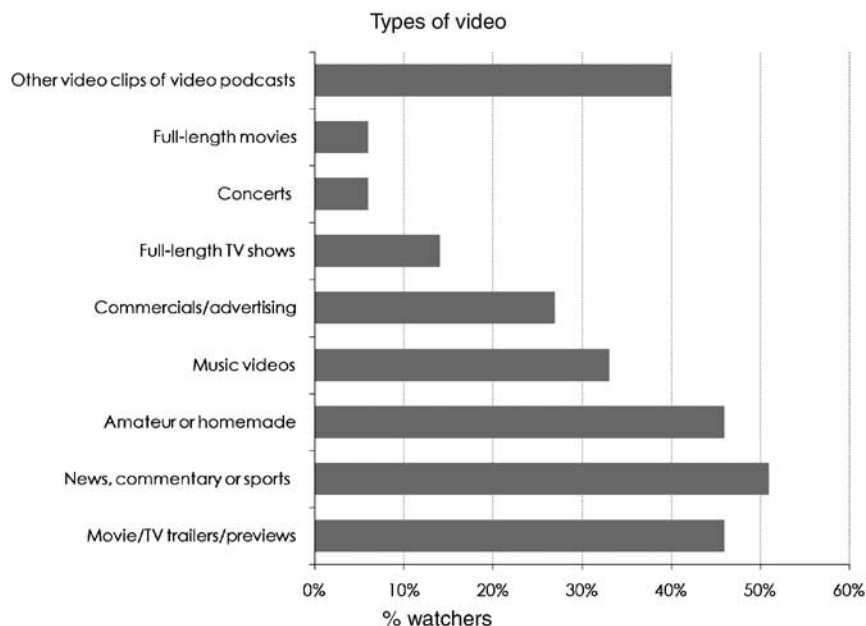


Figure 2: Types of video streamed by online video watchers in the US during March 2007
 Source: Ipsos Insight research.³²

Time spent viewing videos online will increase

Web video is a reality. Marketers need to understand how it works and plan for its use in their organisation

Web video is already consuming large amounts of internet bandwidth and the online viewing time of users. A quarter of the US’s internet population watches online videos at least once a week.

Entertainment-based videos and those created by other users account for the majority of viewing time, as illustrated in Figure 2.

Increasingly, users’ time online will be spent viewing videos. The challenge for marketers is to ensure that this time is spent watching video associated with their marketing campaigns rather than those from competitors.

Pigeon-holing must be avoided

Web video is not a niche activity — It applies to all ages and marketing applications

Marketers must avoid pigeon-holing web video as being a niche activity that is only used by young people and has nothing to do with mainstream marketing.

Table 3 provides an age breakdown of web video users by age. The largest users of online video are 18–24 year olds (75 per cent). In the oldest age group (55+) 44 per cent of the people streamed video. If the over-65s were removed from this sample it is likely that the usage level, between the ages 12 and 65, would vary by less than 20 per cent.

Web video is likely to follow the same evolution path as other web technologies, with age becoming even less of a determinant of use.

Table 3: Demographic profile of US internet users who used web video

Age range	Percentage of age group who have streamed video
12–17	73
18–24	75
25–34	61
35–54	56
55+	44

Source: Ipsos Insight research, December 2006.

Marketers should plan on the assumption that web video will have universal appeal.

Web video should only be used for applications where it adds significant value compared with other communications media

Hopefully, marketers and web designers will not make the same mistakes with web video as they did with animated images. Even now, some websites use animated images in an inappropriate way so that they detract rather than add to the website user's experience.

Web video should only be used in applications that benefit from its unique way of communicating information.

Hence, for example, we know that consumers prefer websites containing customer reviews and customer product endorsements.²² Web video is a perfect mechanism to make this application come to life. It is less obvious, however, why video would improve the customer's experience of understanding a simple fmcg product. The determinant of what works and what does not is largely common sense.

Marketers must resist the temptation of treating video as 'eye candy' that is indiscriminately sprinkled around their websites.

Video as 'eye-candy'

Apply the same quality standards to web video as any other communications technique

Millward Brown published research in June 2007 showing the wide range of effectiveness of web-based video advertising.²³ The best video ads significantly increased brand awareness, message association, brand favourability and purchase intent. The worst video advertising made a small or a negative difference to these factors.

Web video ads that worked the best had the following:

- Creativity that was intrinsically linked to brand and that produced an interactive experience.
- An enjoyable and entertaining storyline.
- A synergy with the brand's offline marketing.
- Did not overly rely on the video's audio track (not all users have their PCs sound activated).

The novelty value of web video will only last a short time — it may already have passed. Poor-quality video will then be ignored or will annoy web users.

Web video requires script-writing not copy-writing skills

The following is taken from an interview with a copy writer who also writes web video scripts.²⁴ It demonstrates why marketers must understand the difference between the two forms of writing.

‘Scriptwriters know that visual memory is stronger than the verbal memory. Using web video is more like watching a film than reading. Film is visual. Actions (what happens, what people do) drive the narrative, not dialogue. In any 2 hour feature film script, there are generally only about 8,000 words of dialogue; the remaining 20–25,000 words describe the scenes and what happens.

When writing for a web video, the script needs to convey the character of the business seamlessly.

On the web the natural inclination is to click — one person speaking for one minute feels like an eternity. In a film, the average length of a whole scene is about one minute and a good scriptwriter can pack a lot in 60s.’

Web copy writers will need to acquire the skills of scriptwriters.

Judging the effectiveness of web video requires more than simple website analytics

Multiple sources

A company’s web video can be accessed from multiple sources:

- Downloaded from the company’s website.
- Distributed as part of an e-mail campaign.
- Pushed through an RSS feed.
- Viewed via YouTube or one of its many lookalikes.
- Incorporated into a social networking website (eg FaceBook).
- Incorporated into a other people’s blogs or wikis.

This means that video clips should be fully branded, the content should, whenever possible, be trackable and shared on the company’s terms.

Marketers need to extend the way they measure what is happening with their web video material. This is not always a simple task. Hopefully, the web analytics companies will extend the functionality of their products to make this possible.

Ensure the ownership of the web video’s intellectual property is understood

Legality issues

As YouTube is discovering, it is very difficult to stop people from loading and displaying video material they do not own.

If a company’s web video uses music and actors, then there might, almost certainly will, be copyright implications.

If the video comes from a marketplace site like Mochila and Brightcove, there might be copyright implications.²⁵

If a video originates from YouTube or Google Video, you may have broken copyright laws by loading it.

Web video adds an extra burden for marketers to ensure that their web video is legal.

Evolution of web video

How will web video evolve?

Attempting to forecast the future in such a fast-moving area is extremely difficult, if not impossible. It is less than 24 months since YouTube started operations, and so attempting to predict what the world of web video will look like in another 24 months time is futile.

It is possible to extrapolate existing developments and trends to speculate the effect they will have on the way marketers' use of the technology.

Continuing technological improvements

This is probably the easiest factor to predict, as all these developments are already taking place.

- *Better quality video* — Broadband transmission speeds are increasing. Adobe has already announced its latest version of Flash Player that enables it to play High Definition (HD) video. In some countries (like the UK), there is a difference between the broadband speeds in urban and rural areas. Marketers will be working in a two-speed broadband world for at least the next 2–3 years.
- *Distinction between television and web video will blur* — Most of the major broadcasters are making available their programming for viewing on PCs. Devices like Apple TV and Slingbox are integrating the *television* and the web.
- *Websites will become videos with text* — The way we view videos will become integrated into the fabric of the website. The 'video box' will disappear, enabling the video to appear as an integral part of the website. Smartfusion is an example of a site where video is the dominant media.²⁶
- *Greater use of live web video* — We will see more use being made of video transmitted live on the internet with a two-way dialogue between the broadcaster and the audience using instant messages, e-mails and phone calls. There are already companies providing this service.²⁷

The industries that win and lose from the growth of UGC will become apparent

Winners and losers

For some industries, the growth of UGC is a significant threat, and for others it is an opportunity to improve their communications with the market.

Accenture's annual survey of senior executives in the media and entertainment industry²⁸ found that 57 per cent of the respondents identified the rapid growth of UGC (eg amateur digital videos, podcasts, mobile phone photography, wikis and social-media blogs) as one of their top three business challenges.

The head of Accenture's Media & Entertainment practice said: 'Traditional, established content providers will have to adapt and develop new business and monetisation models in order to keep revenue streams flowing'.

For the Entertainment and Media industry, web video creates the risk that a company's intellectual property will be stolen and recycled in addition to increasing the competition for people's viewing time.

For the industries that benefit from providing consumers with a more intense and lifelike portrayal of their products and services (eg Travel), there will be great benefits.

Segregation of content will disappear

The segregation of content into video only websites will reverse

During the first phase of the web's development, companies often separated their activities into web and 'bricks and mortar'-based businesses. There was no logical reason why this was done and over the years the two businesses have combined. This occurred because companies failed to understand how their customers would react to the technology. Business is business, whether it is conducted on the web or through a retail outlet.

A similar trend is occurring today, with companies segregating their video activities into websites with a 'tv domain'. There is no logical reason why this demarcation should be made.

From the consumer's perspective, video, text, images and sound are all forms of information and should be used in the most appropriate combination.

With the exception of some video-only websites, this segregation will disappear in the next few years.

Re-balance of power

Web video will increasingly re-balance the power between individuals and companies

The speed at which an embarrassing video clip can reach a global audience will increasingly cause organisations problems.

The following are two examples of how web video can be used by a disgruntled consumer or employee.

Tripadvisor²⁹ is the largest travel community website with over 24 million monthly visitors. The site provides UGC about hotels and travel locations. Up until recently, this content was text and photographs but recently a video upload feature was added. Suddenly, the disgruntled consumer has the opportunity of filming their dirty and noisy hotel room and giving it a global audience.

Shahram Ahari was a former employee of Eli Lilly and Co. His interview with a journalist, during which he was critical of his past employer, was videoed and uploaded to YouTube.³⁰ So far, it has received only a small number of views (23,000). There are no reasons why this number of viewers could not increase by a factor of a thousand.

Greater syndication of web video content

The New York Times, Reuters and lifestyle brands like LX.TV and IGN Entertainment are partnering with MySpace to provide premium channels on the social networking site's video platform.³¹

Channels.com is partnering with Facebook to deliver daily video clips to the social networking site's users based on their favourite television shows as listed in their profile.

These are two high-profile examples of how video content is being syndicated.

Astute marketers can rapidly add value to their websites by taking advantage of the mass of web video material that is being syndicated from third-party suppliers.

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