



# OK, I'm Mayor. Now What?

A look at where SoLoMo will go and how  
it might create value

# Where Did it Come From?



KPCB's John Doerr Calls It "SoLoMo"...

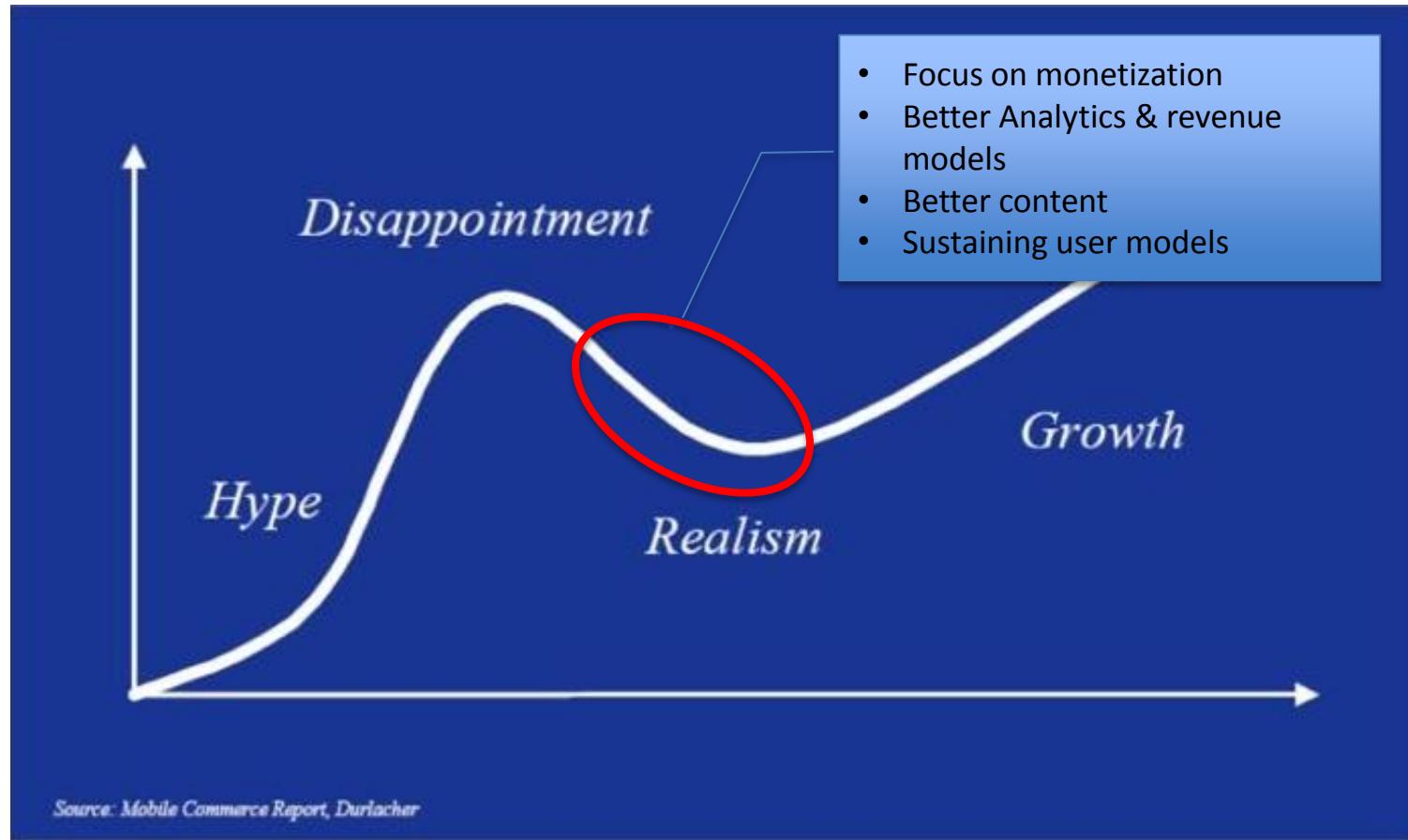
# SoLoMo

**Social**

**Local**

**Mobile**

# Where are we on the Hype Cycle?



# SoLoMo Whack-a-Mole



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# May be the wrong order...

So | Lo | Mo

Social      Local      Mobile

# Mobile: The Basic Platform

**M**obile **Lo**cal **So**cial

**Mobile**

**Local**

**Social**



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# Mobile Has Become Obvious

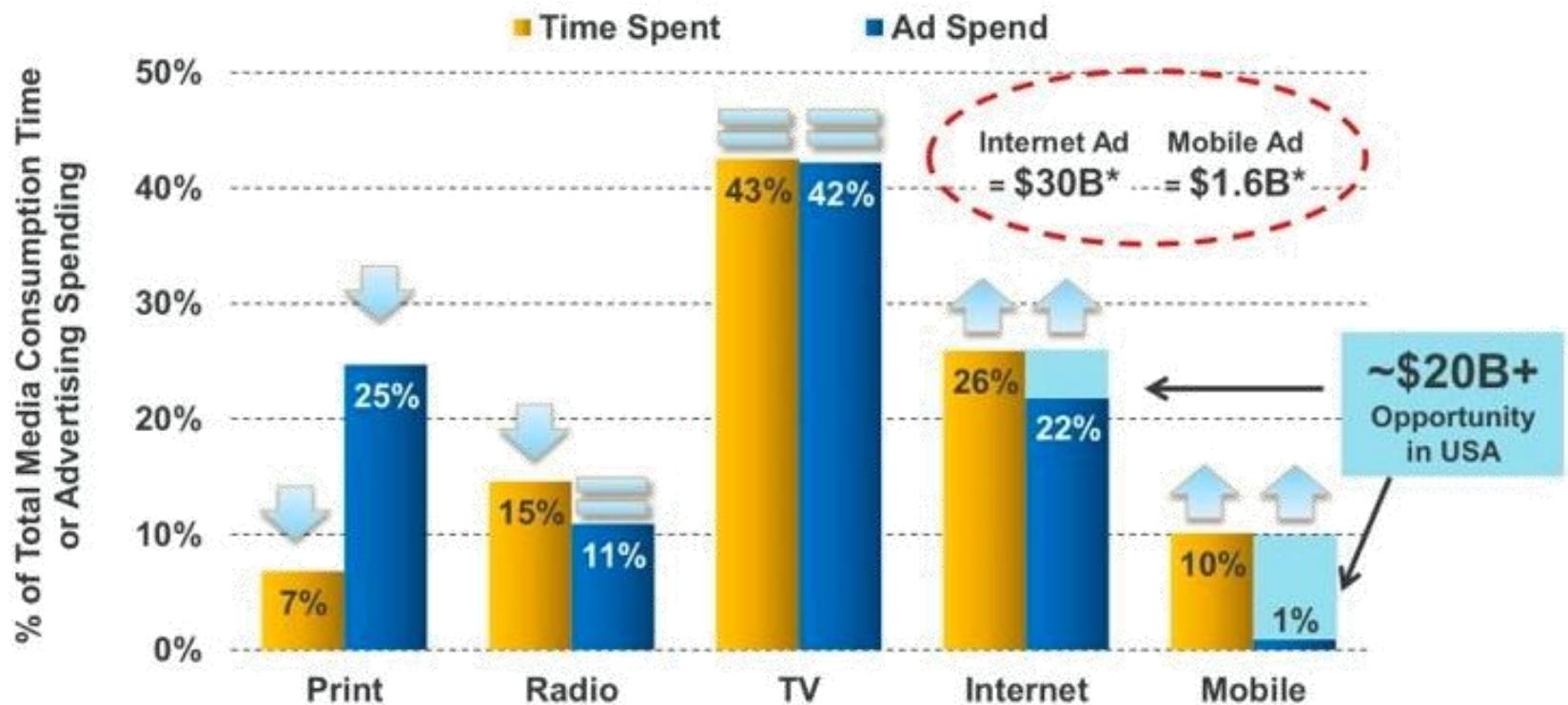


# For the non-quantitative...

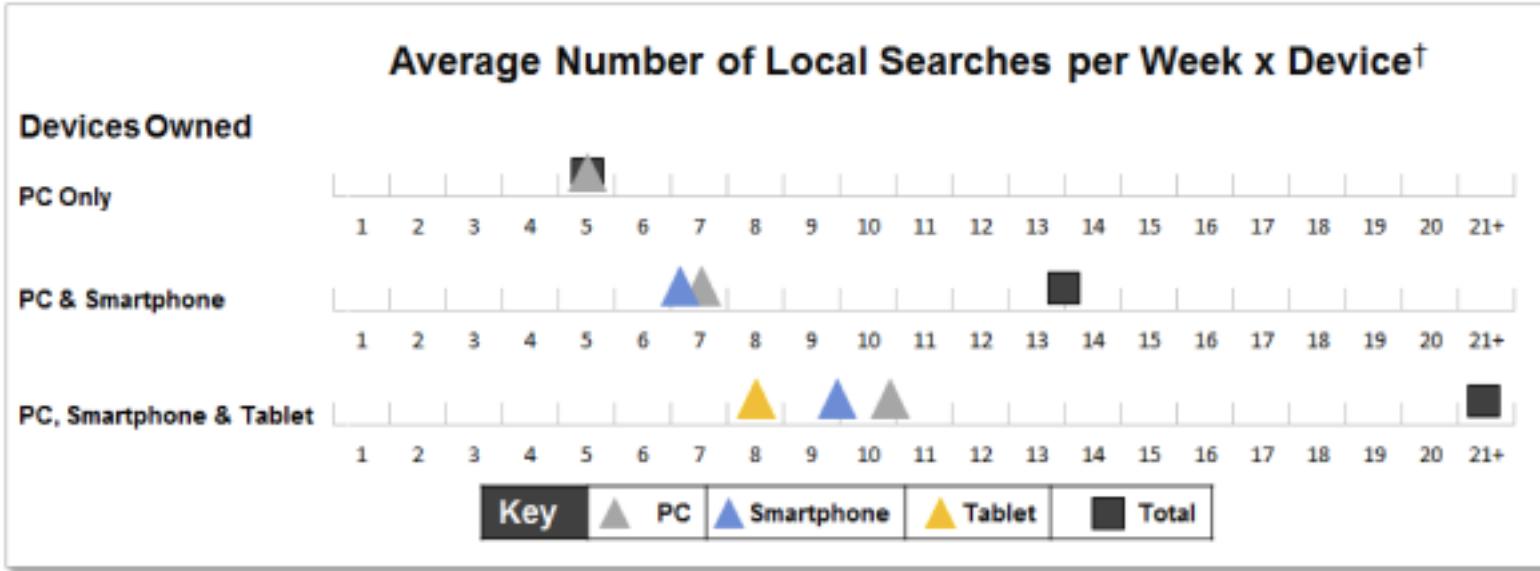


# The Hope: Untapped Potential

% of Time Spent in Media vs. % of Advertising Spending, USA 2011



# Blurring of Desktop and Mobile



<sup>†</sup>Average number of searches per week, across locations (home, work/school, on-the-go)

Source: immr Local Search Study, July 2012

- Search is strongly correlated to device ownership
- Can search, find, research, compare, respond, purchase, discuss equally well on Mobile and Desktop.
- Implication: What I saw on my desktop, I may buy off my mobile

# Context: Personalization

- Mobile phones are ground zero for online personalization
  - Apps
  - Contacts
  - Calendar
  - Communications
  - Location Preferences



# Location: Contextualization



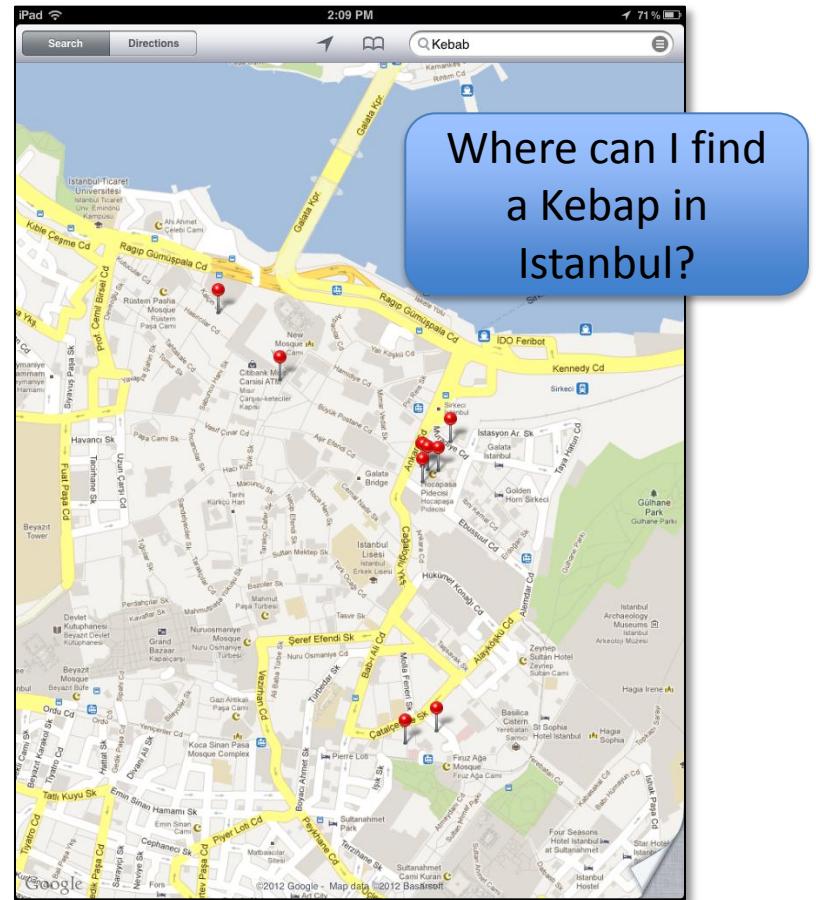
**MoLoSo**

Mobile      Local      Social

The diagram consists of a large rectangle divided into three vertical sections. The first section on the left contains the word "Mobile". The middle section contains the word "Local" and is highlighted with a thick black border. The third section on the right contains the word "Social". Above these words, the letters "M", "o", "L", "o", "S", and "o" are stacked vertically, forming the acronym MoLoSo. The "o" in "Local" is positioned between the "L" and the "S".

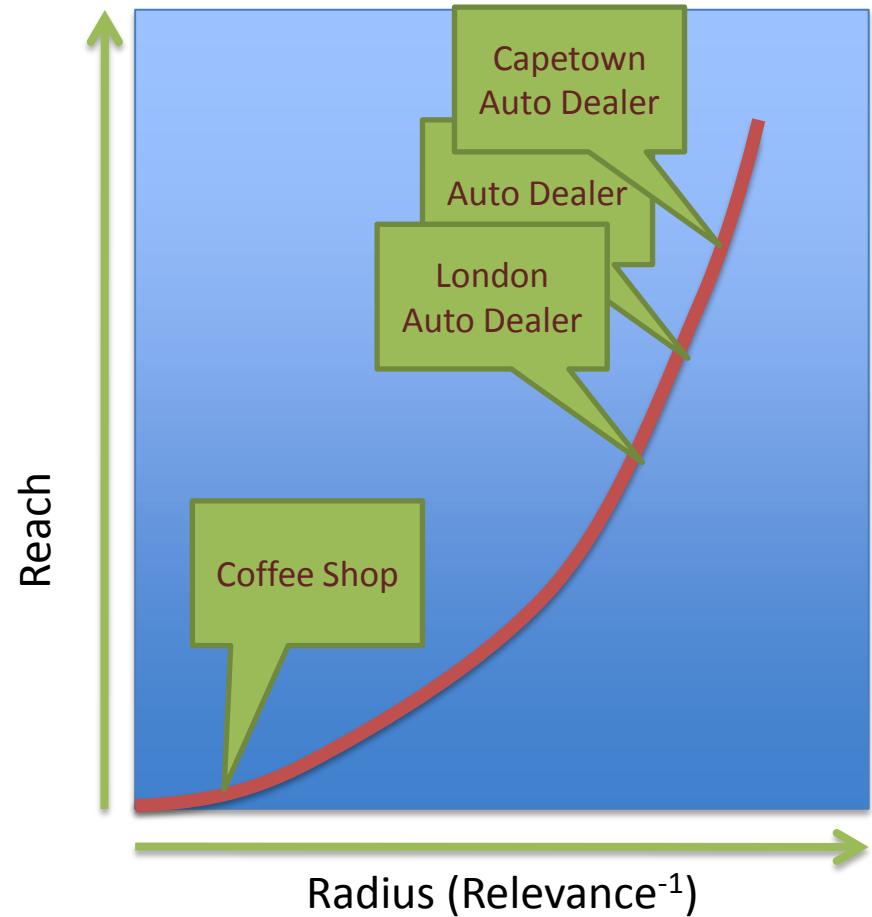
# Local Search

- Most highly monetized online revenue
  - Online local search has disrupted off-line
- Well adopted, evolving merchant models
  - Search suggests intent
  - Search monetization well defined



# Reach vs Radius (& Relevance)

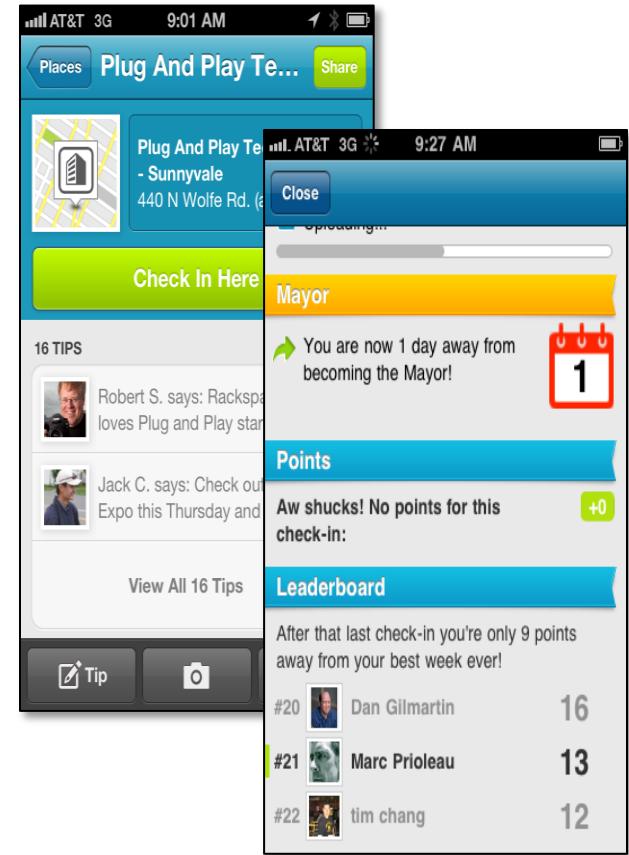
- Determining the right radius not a well understood science



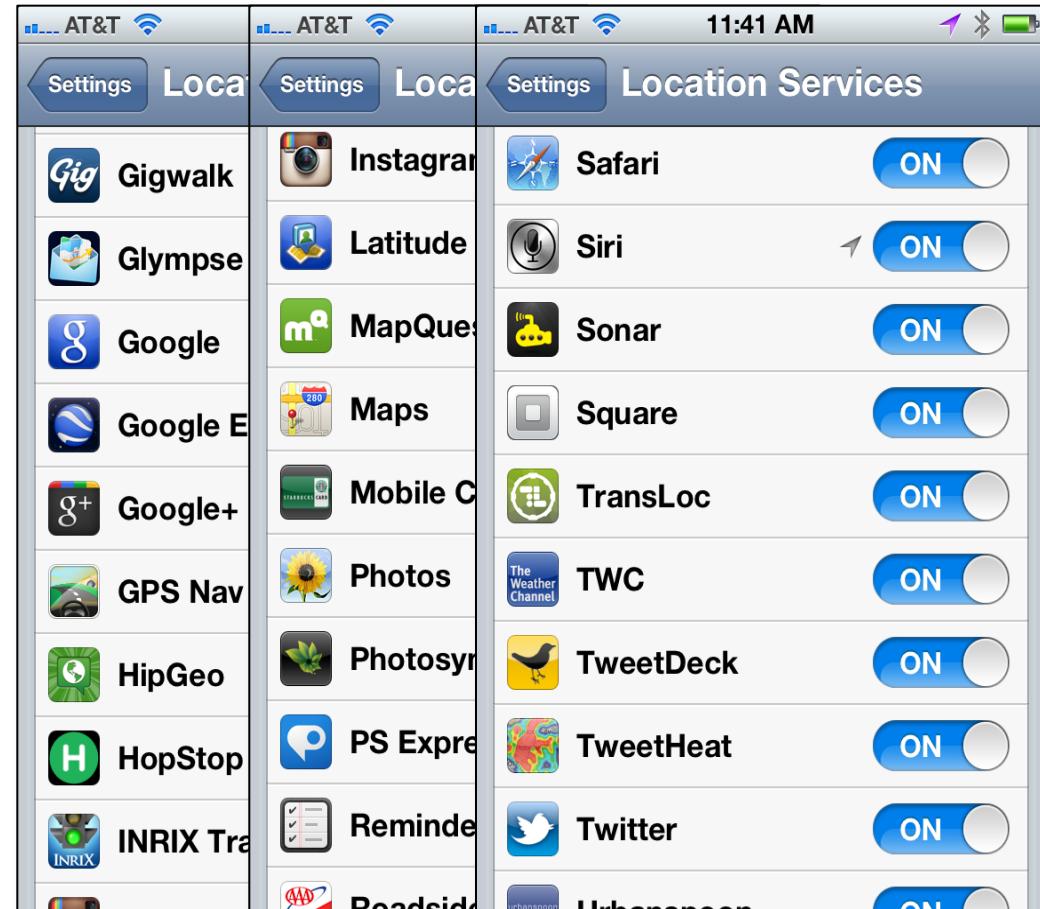
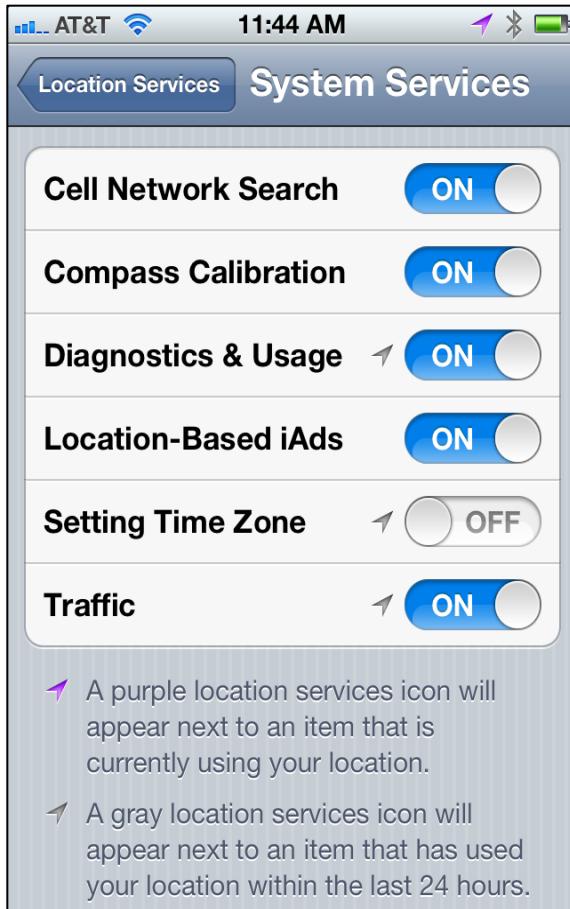
# The Maligned Check-In

- Foursquare pioneered the check-in
  - Semi-Interesting social gesture
  - Very interesting engagement mechanism
- Problem: Check-In fatigue

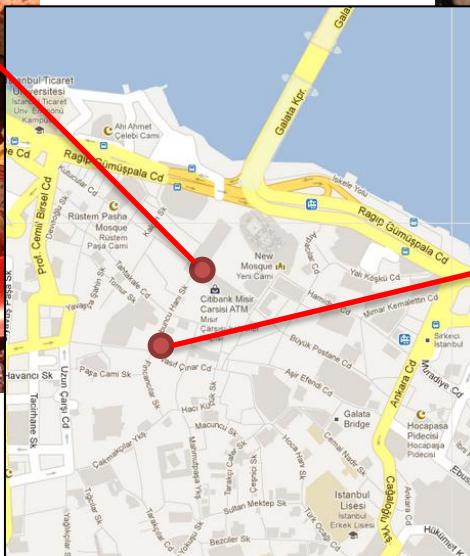
Most location based apps today assume:  
**Active User**  
**Reactive Network**



# But phones track location...a lot



# Places Have Context



# Location for Personal Context



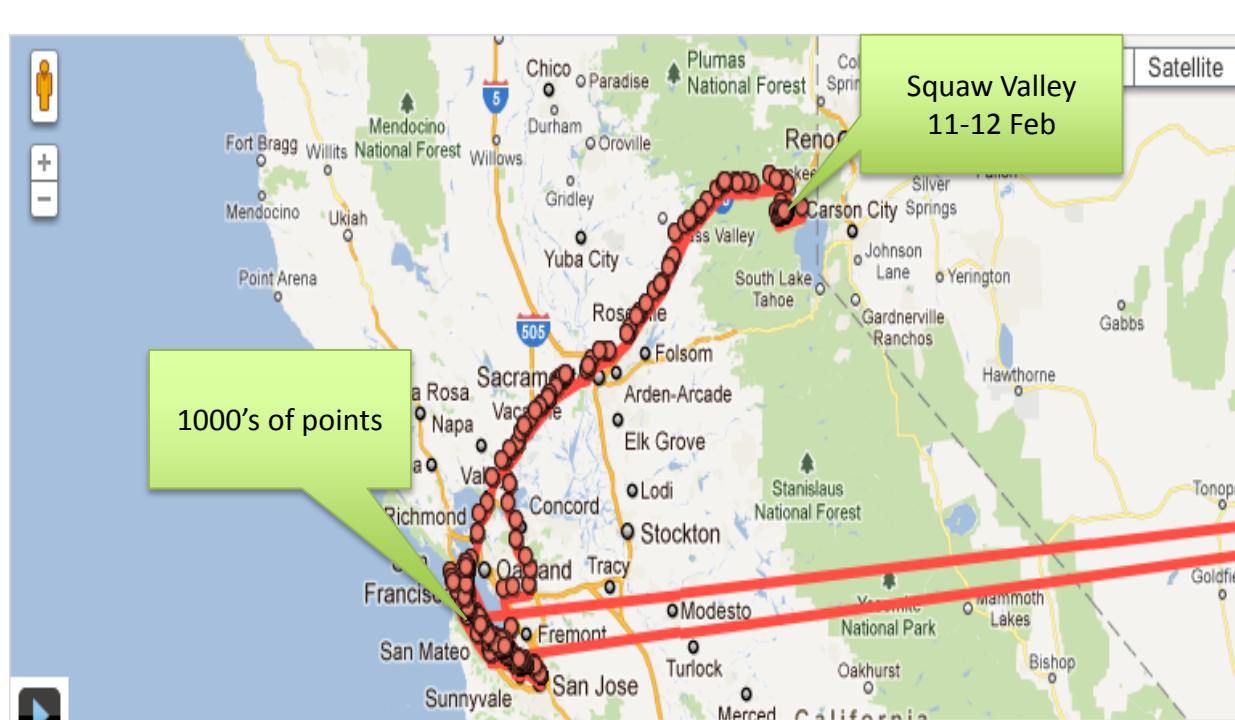
# 30 Days in My Life



Marc is:

- From California
- In Telecom
- Cheap
- A Swiss Air Traveler

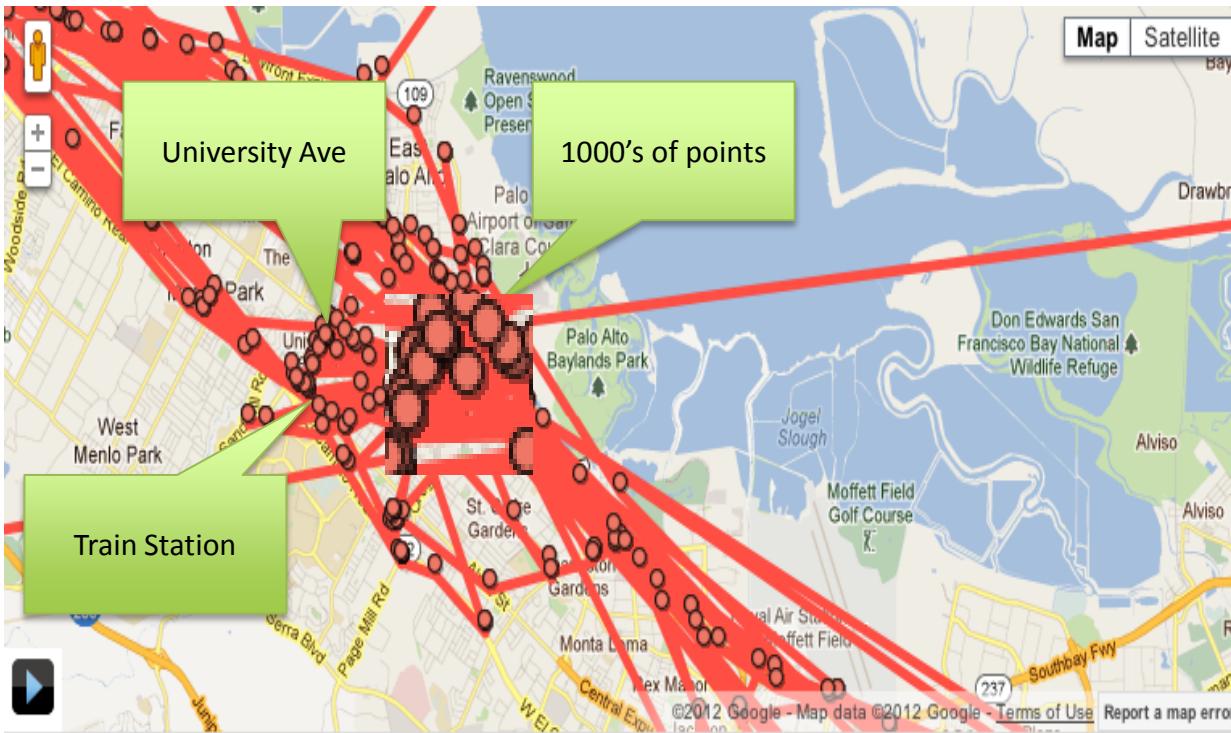
# 30 Days in My Life



Marc is:

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- A Swiss Air traveler
- From SF Bay Area
- A skier

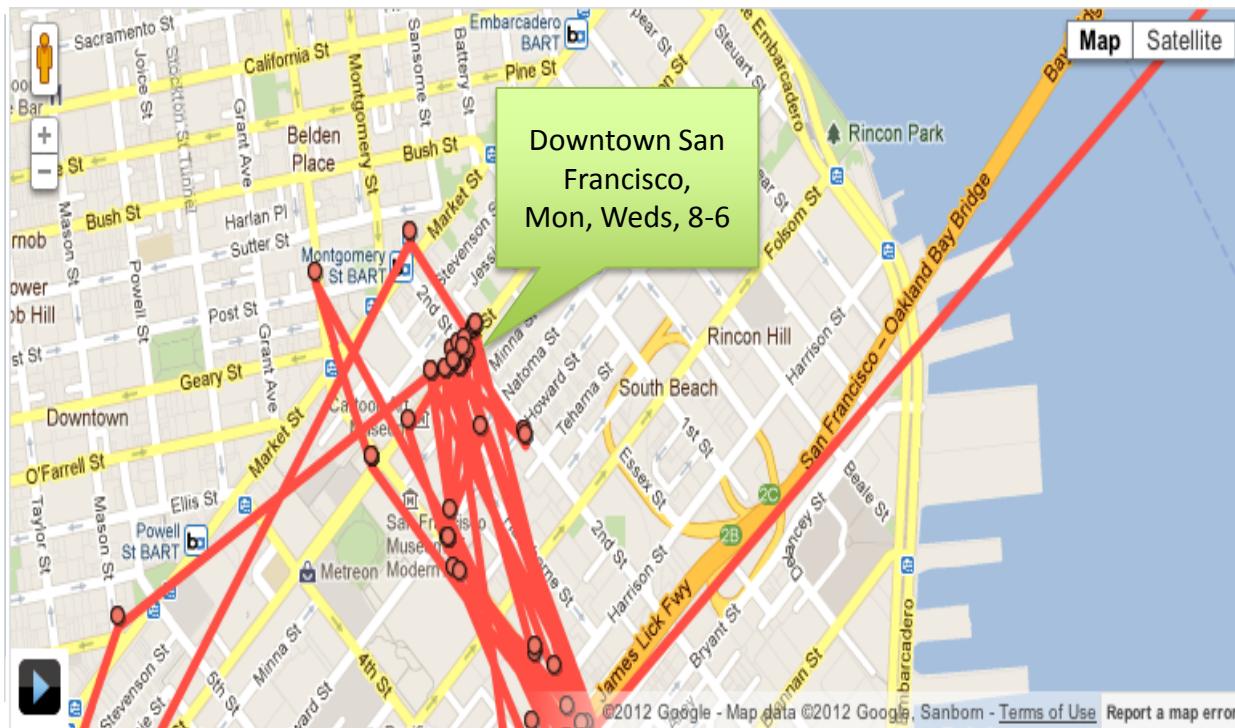
# 30 Days in My Life



## Marc is:

- From California
- In Telecom
- Cheap
- A Swiss Air traveler
- From SF Bay Area
- A skier
- From Palo Alto
- Likes to get coffee on University Ave
- A train rider

# 30 Days in My Life

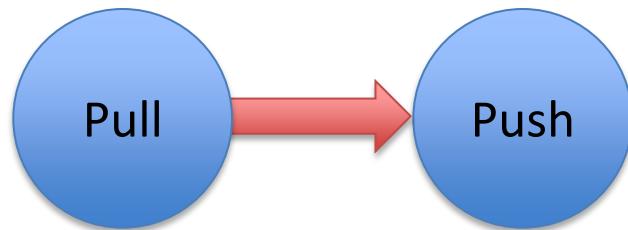


## Marc is:

- From California
- In Telecom
- Cheap
- A Swiss Air traveler
- From SF Bay Area
- A skier
- From Palo Alto
- Likes to get coffee on University Ave
- A train rider
- In downtown SF two days/week for work

# Mobile + Location = Context

- We can assign meaning to location
- Meaning drives context
- Context drives relevance
- Relevance drives conversion



# First Move to Push: Geofences

- Push message to people based on user location and (maybe) preferences
- Very advertiser-centered

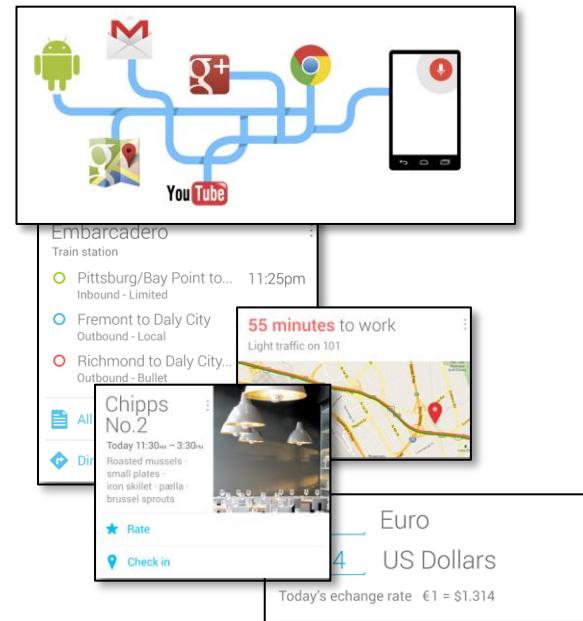


# Two Services to Watch

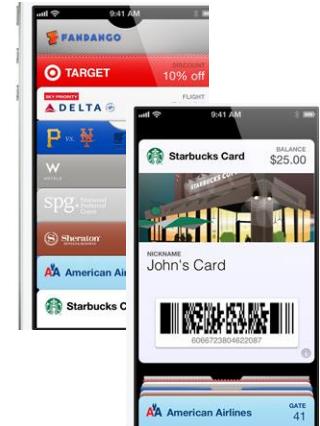
Push predictive information pushed to the user based on location, time, etc.

- Place Information
- Traffic/Real time data
- Deals
- Offers
- Friends nearby
- Etc...

Google Now



Apple Passbook



# Social: Adoption & Recommendation

Mo | Lo

Mobile

So

Local

Social



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# Social Influence

- Social is no longer a discreet segment of online
- Every aspect of Online will have a social component
  - Communication
  - Search
  - Reviews
  - Marketing
  - Buying/eCommerce



# “Best Kebap in Istanbul!”

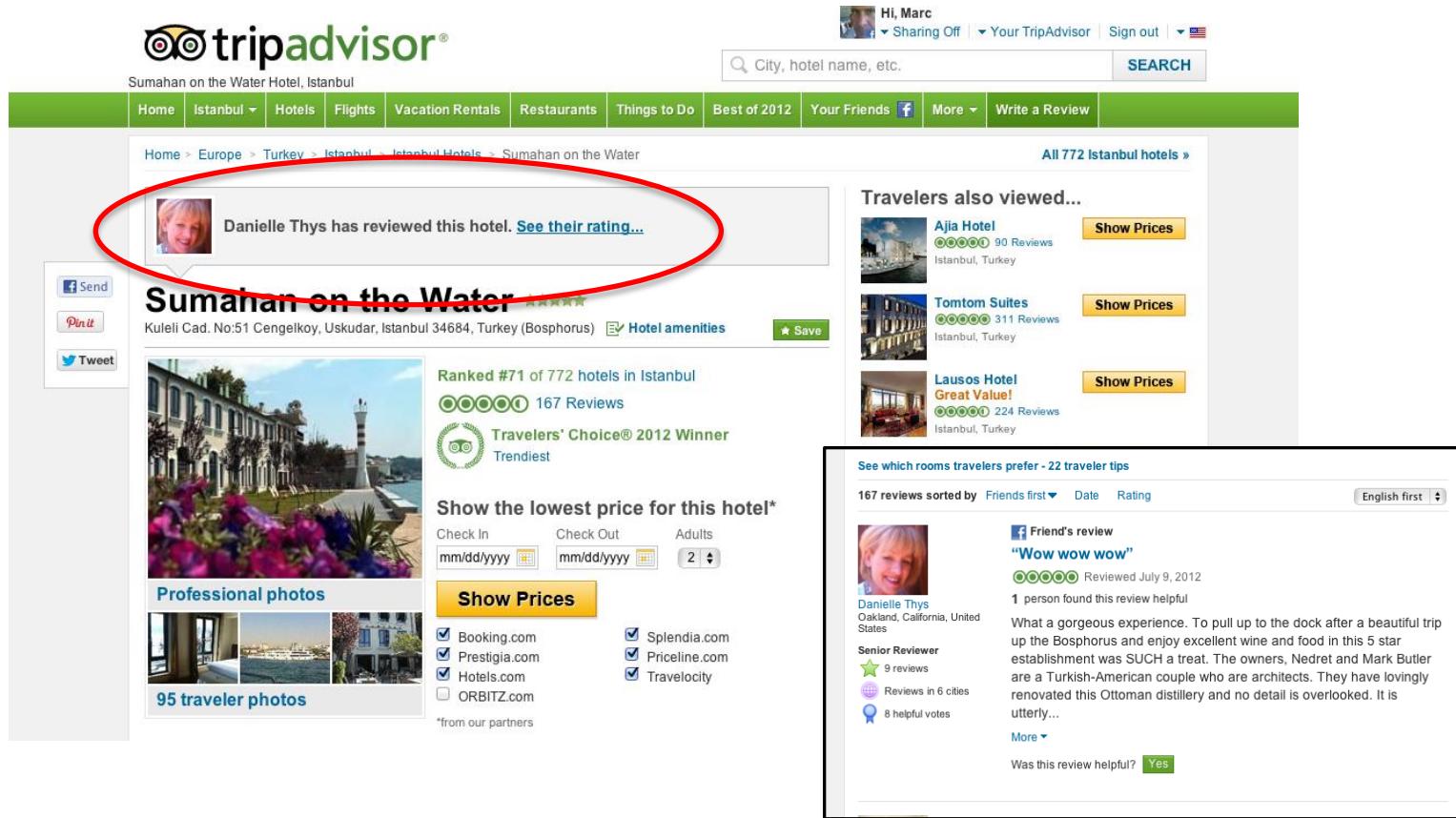
**HUZUR CAFE & RESTAURANT**  
**KEBAP SHOP**

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# Social Recommendations in Search



The screenshot shows a TripAdvisor search results page for "Sumahan on the Water Hotel, Istanbul". The top navigation bar includes links for Home, Istanbul, Hotels, Flights, Vacation Rentals, Restaurants, Things to Do, Best of 2012, Your Friends, and a search bar. The main content area displays the hotel's profile with a thumbnail image, address (Kuleli Cad. No:51 Cengelkoy, Uskudar, Istanbul 34684, Turkey (Bosphorus)), and a "Hotel amenities" link. A red circle highlights a social recommendation from Danielle Thys, with the text "Danielle Thys has reviewed this hotel. [See their rating...](#)". Below this, the hotel's name "Sumahan on the Water" is displayed in large letters, followed by its address and a "Save" button. To the right, a sidebar titled "Travelers also viewed..." lists three other hotels: Ajia Hotel, Tomtom Suites, and Lausos Hotel, each with a "Show Prices" button. At the bottom, a box titled "See which rooms travelers prefer - 22 traveler tips" shows a review from Danielle Thys, a Senior Reviewer from Oakland, California, United States, with a rating of 5 stars and the text: "Wow wow wow! Reviewed July 9, 2012. What a gorgeous experience. To pull up to the dock after a beautiful trip up the Bosphorus and enjoy excellent wine and food in this 5 star establishment was SUCH a treat. The owners, Nedret and Mark Butler are a Turkish-American couple who are architects. They have lovingly renovated this Ottoman distillery and no detail is overlooked. It is utterly...".

# Which Social Network?



# Social Graph vs Interest Graph



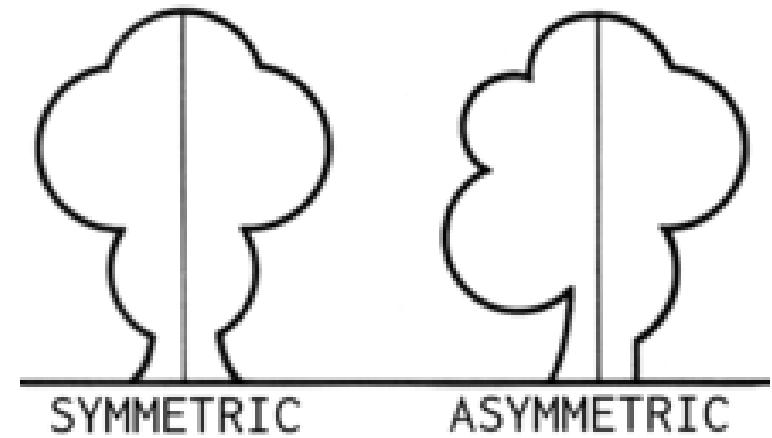
reddit

Pinterest



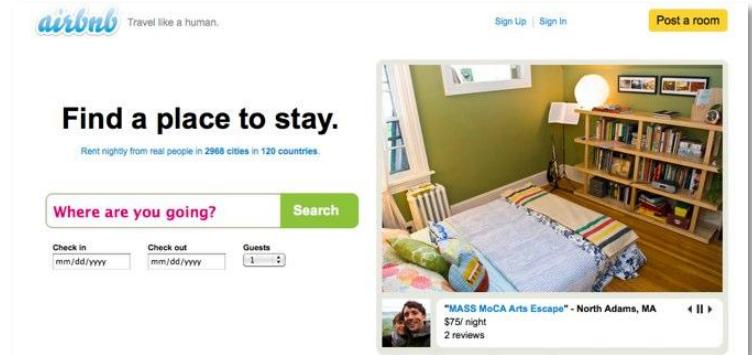
# Social Disruption: Asymmetry

- Most transactions are asymmetric
  - One side knows more than the other
- Social information can shift the balance, creating new opportunities



# Would you invest in...

- A business that assumes homeowners will rent spare rooms to complete strangers?



# Job Search

In Employment  
Who is the Buyer &  
Who is the Seller?

- Glassdoor is building content for job seekers to be better buyers

The screenshot shows the Glassdoor homepage with the search bar set to 'online classified' in 'San Francisco, CA'. The results page displays 10 classified online jobs. A specific listing for 'Front-End Developer' at 'Armada Group' is shown. A red box highlights the 'eBay Ratings & Reviews' section for this job, which includes a company rating of 3.0, a CEO rating for John J. Donahoe, and a 47% approval rate. The page also shows a summary of pros and cons from a 'Senior Marketing Project Manager'.

Did you mean to search for job titles matching **classified** OR **online**?

10 Classified Online Jobs in San Francisco, CA

**Front-End Developer**  
Armada Group – San Jose, CA – Map  
Primary focus will be on delivering presentation development work as web applications for an online classifieds business Work with other engineers managers product...  
Dice – 22 days ago

**Head of Strategy & Operations**  
eBay – San Jose, CA – Map  
your key responsibilities will be to Lead all strategic planning analytics and reporting...  
Dice – 24 days ago

**eBay Ratings & Reviews**

Company Rating (Based on 627 reviews)	3.0 ★★★★☆	CEO Rating (Based on 403 reviews)
Employees say it's "OK"		John J. Donahoe – President and CEO
47% Approve		

Senior Marketing Project Manager in San Jose, CA said:  
"Senior management seems to genuinely care about employee welfare"  
Pros: "Great people - smart, talented, focused After some hard times, the company is again on a positive trajectory Company tries hard to make employees happy"  
Cons: "There aren't enough resources to get done all that needs to get done - some projects pushed out two years or more The business model of the company is limiting..." – [Full Review](#)

[More eBay Reviews »](#)

# Want a Tour?



highlight



# Marc's Bold Predictions

	<u>Now:</u>	<u>Will be:</u>
Mobile	Equal	Dominant
Location	What's Near	What's Relevant
Social	“Like”	Social Recommendation Special Interest Symmetrical Transactions



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# Thank You

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