

OK, I'm Mayor. Now What?

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

Birth of a Market

KP
CB

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

SoLoMo

Social

Local

Mobile

SoLoMo Case Study: Foursquare



SoLoMo Evolution



Foursquare is the Breakout Mobile App at SXSW



March 16, 2010 by Jennifer Van Grove

Only 10% Of Businesses Would Pay For Foursquare: Survey

Jun 13, 2010 at 12:00pm ET by Matt McGee

Foursquare's Crowley Can Feel Foursquare Fatigue, Has Plans To Fix It

Nov 10, 2010 at 2:43pm ET by Danny Sullivan

In the End,
Content Wins

Google's Mobile Moves Tighten Its Grip On Local

Feb 2, 2011 at 9:39am ET by Greg Sterling

Foursquare Hits 2 Billion Check-ins, 20 Million Users

Apr 16, 2012 at 2:26pm ET by Matt McGee

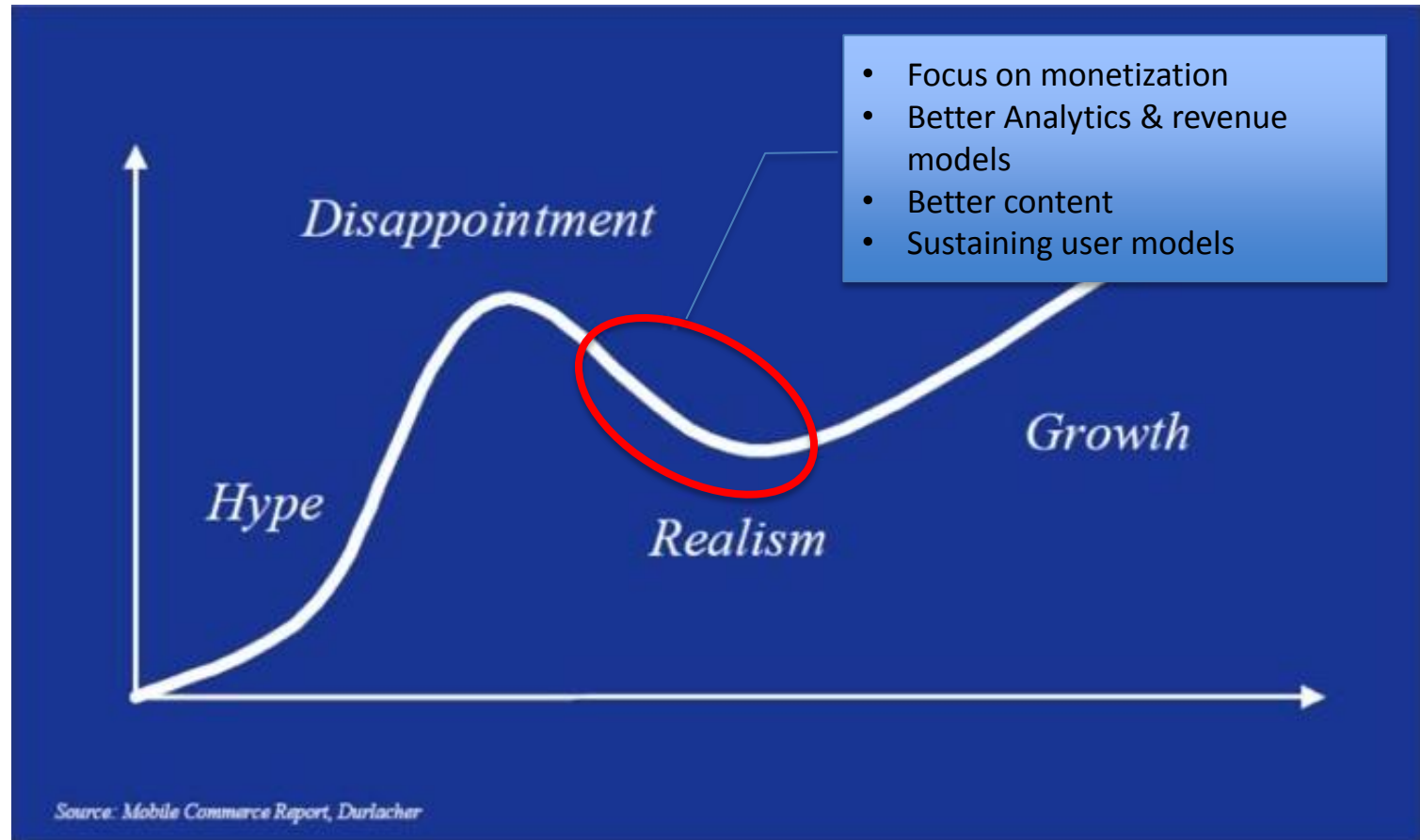
Foursquare Hints At Evolution After Getting \$20 Million

Jun 30, 2010 at 2:47pm ET by Greg Sterling

Foursquare Takes On Yelp With New Homepage Search Box

Oct 15, 2012 at 9:12am ET by Greg Sterling

Where are we on the Hype Cycle?



May be the wrong order...

SoLoMo

Social

Local

Mobile

Mobile: The Basic Platform

Mo

Mobile

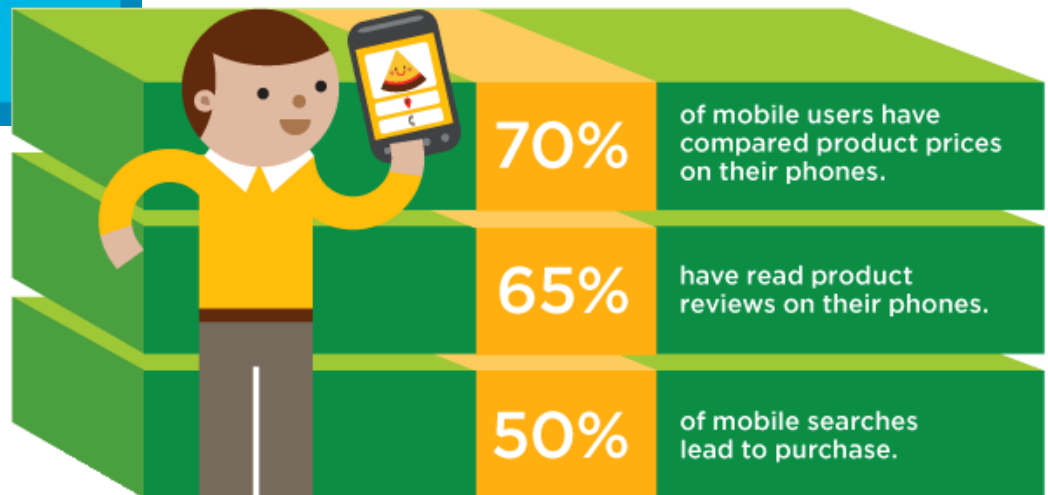
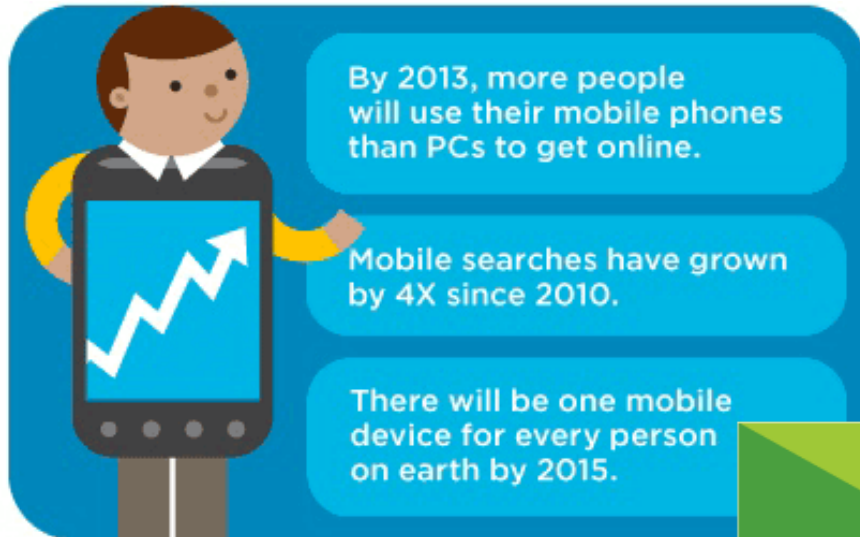
Lo

Local

So

Social

Mobile Has Become Obvious

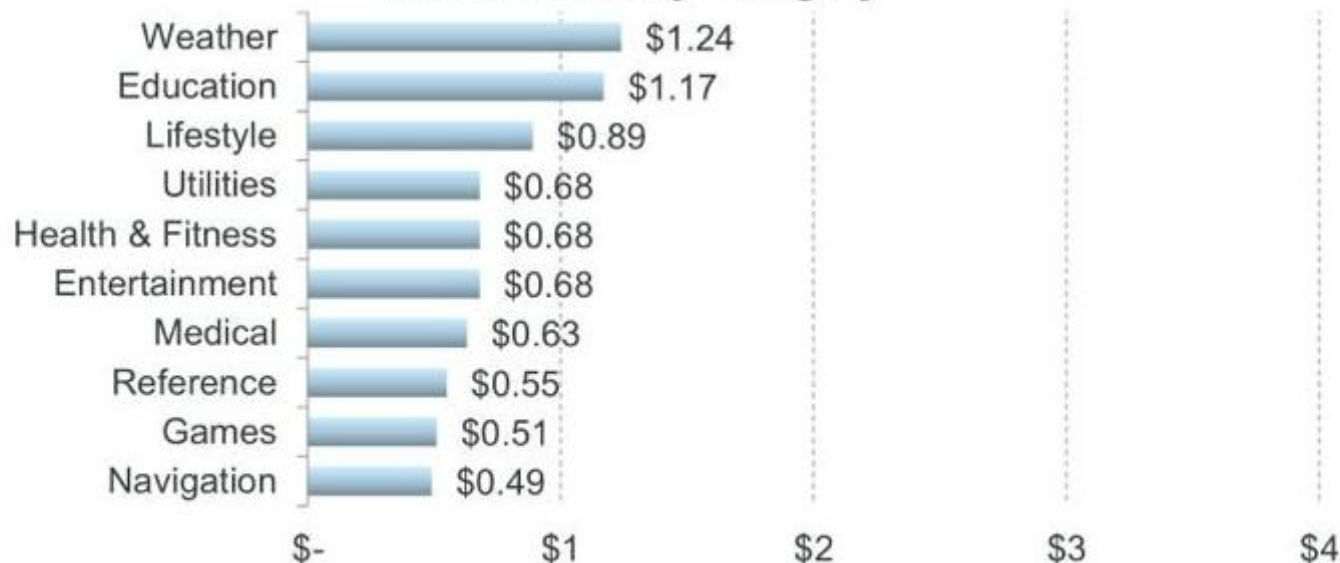


The Bad News: Monetization

Effective CPM, Desktop Internet* vs. Mobile Internet**

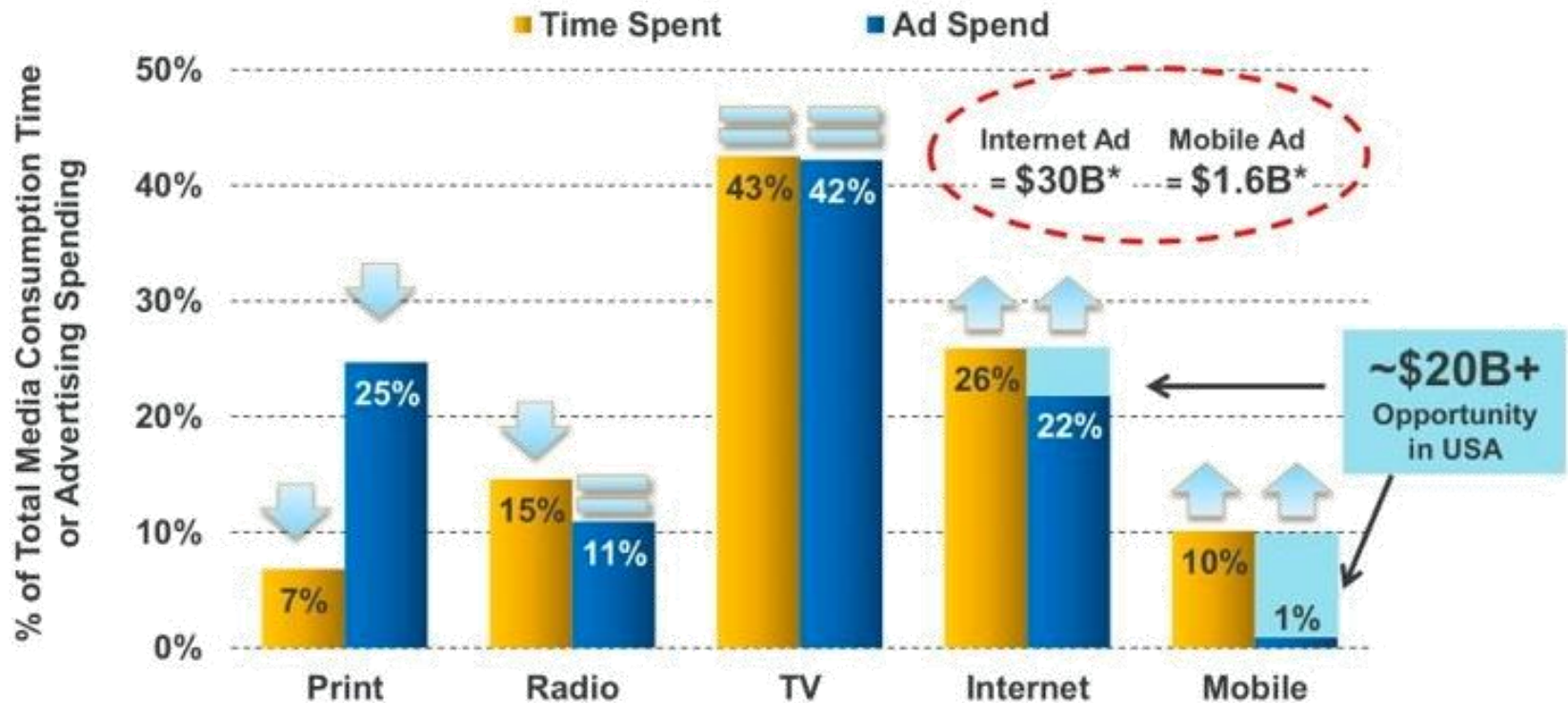


Mobile eCPM by Category



The Hope: Untapped Potential

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



Design for Mobile



Keep it Quick



Simplify Navigation



Be Thumb-Friendly



Design for Visibility



Make it Accessible



Make it Easy to Convert



Make it Local



Make it Seamless



Use Mobile Site Redirects



Listen, Learn and Iterate

Blurring of Desktop and Mobile

- Online behavior is no longer segmented into “mobile” behaviors and “desktop” behaviors
- 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
- Integration of phone with vehicle now underway in several ways

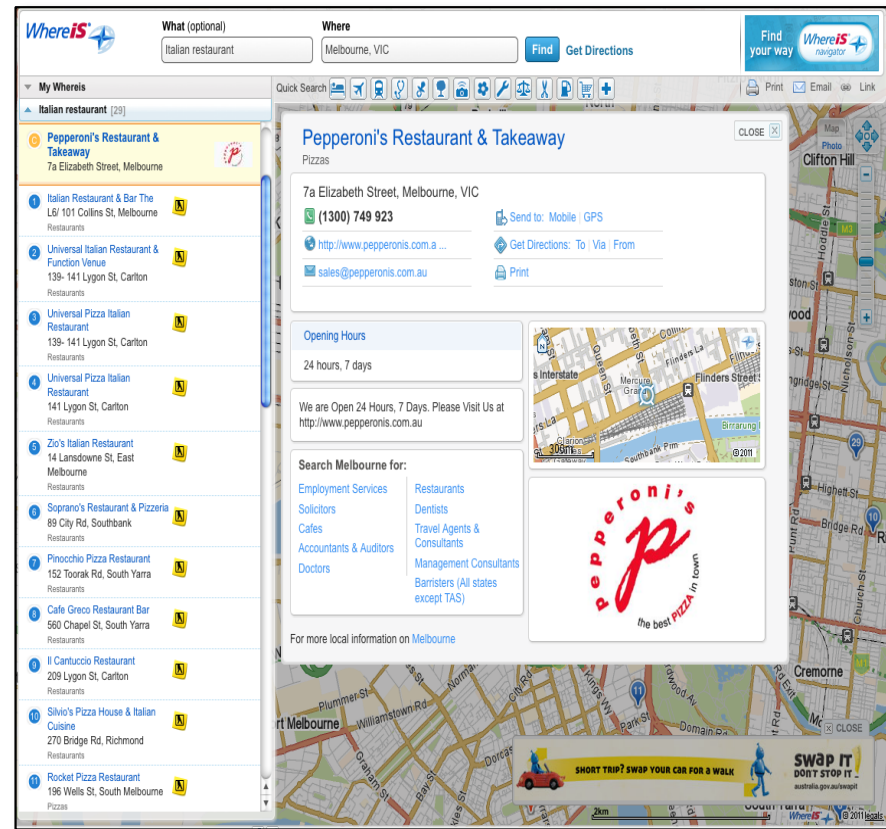


Location: Contextualization



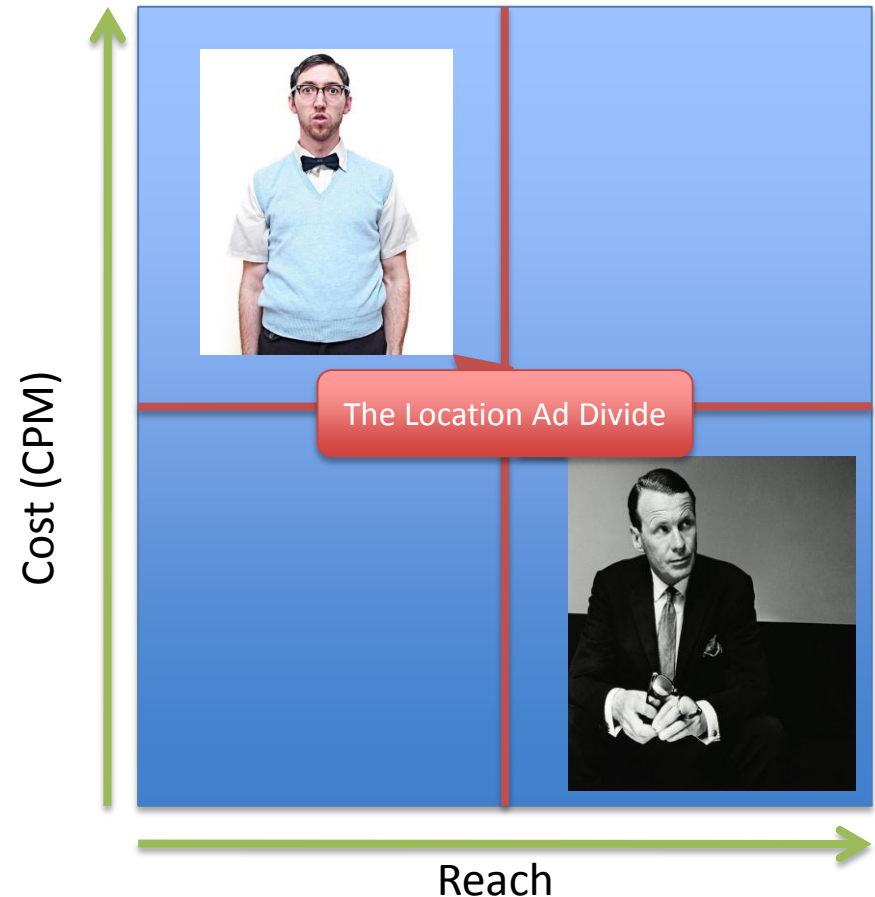
Local Search

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



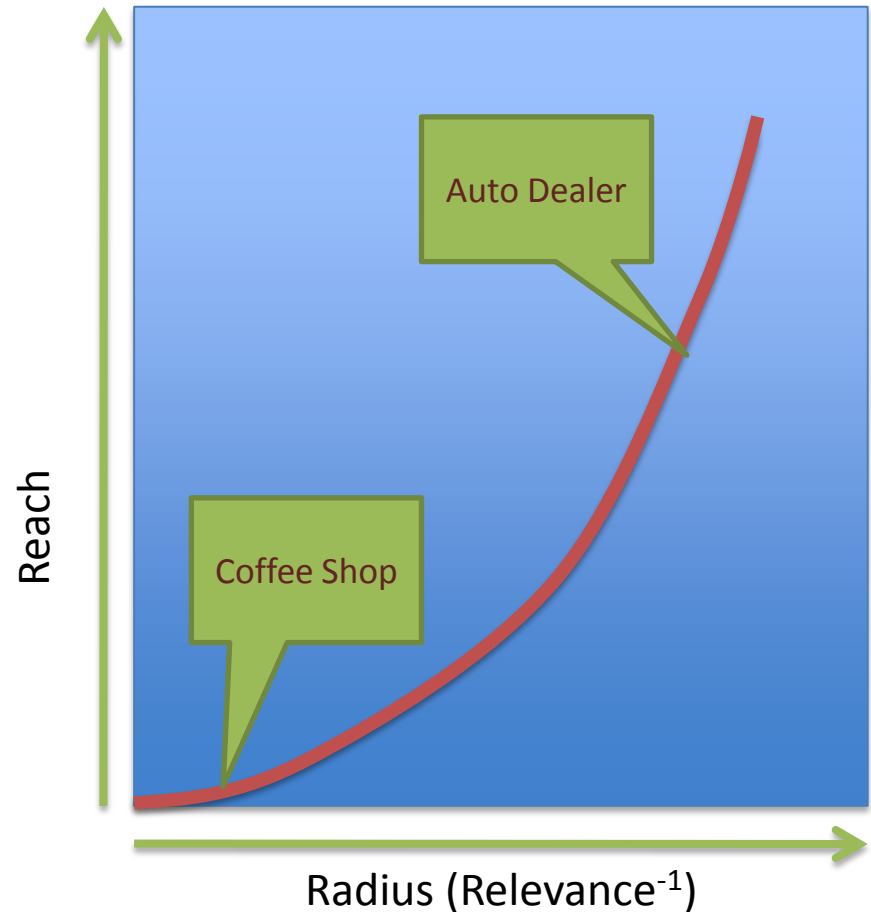
Location-Based Advertising

- Spending on on-line (hyper-)local advertising remains defiantly small
- Locations Services and Brands talking past each other

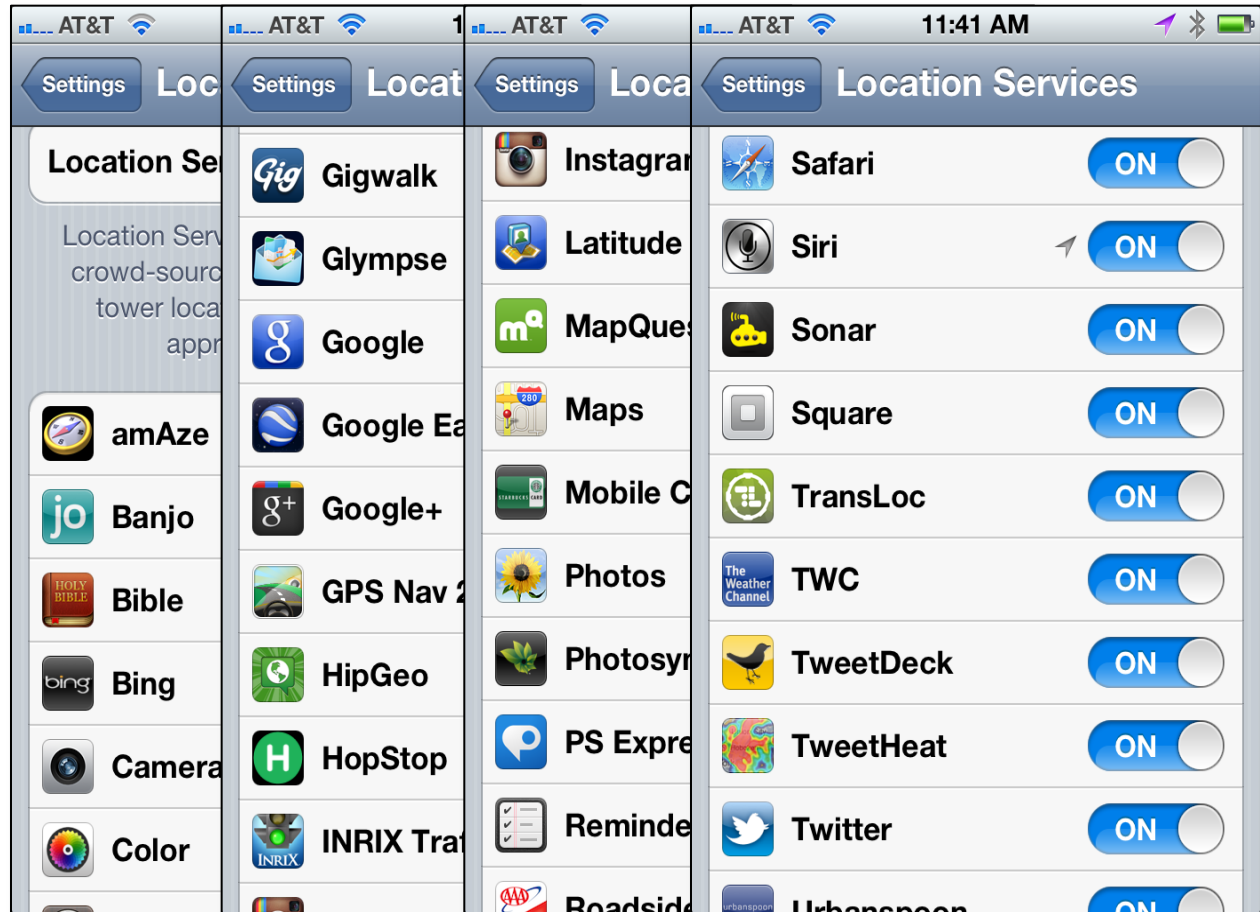
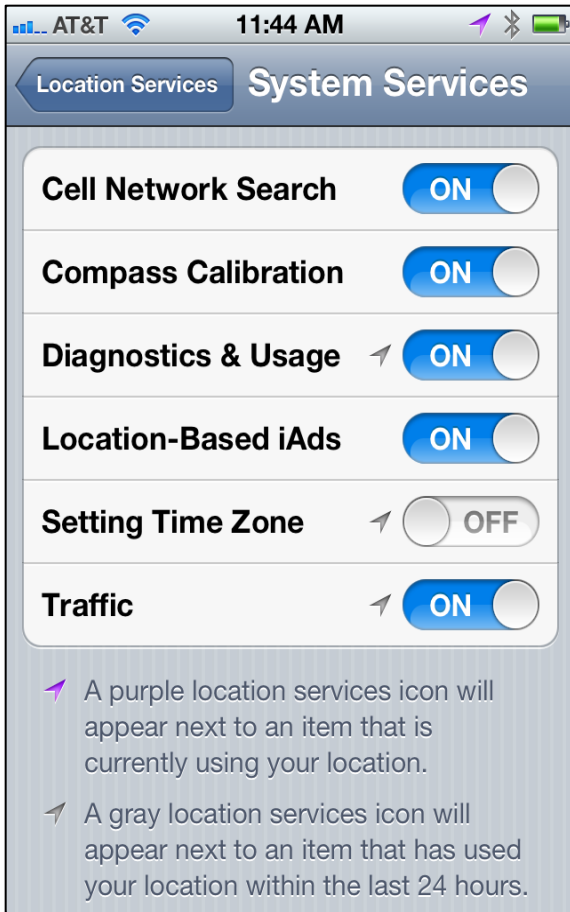


Reach vs Radius (& Relevance)

- Conversation with Mobile Ad company:
 - **Importance** of location: 8 out of 10
 - **Understanding** of Location: 4 out of 10



Phones track location...a lot



Let's Be Social Scientists....



30 Days in My Life

Marc is:

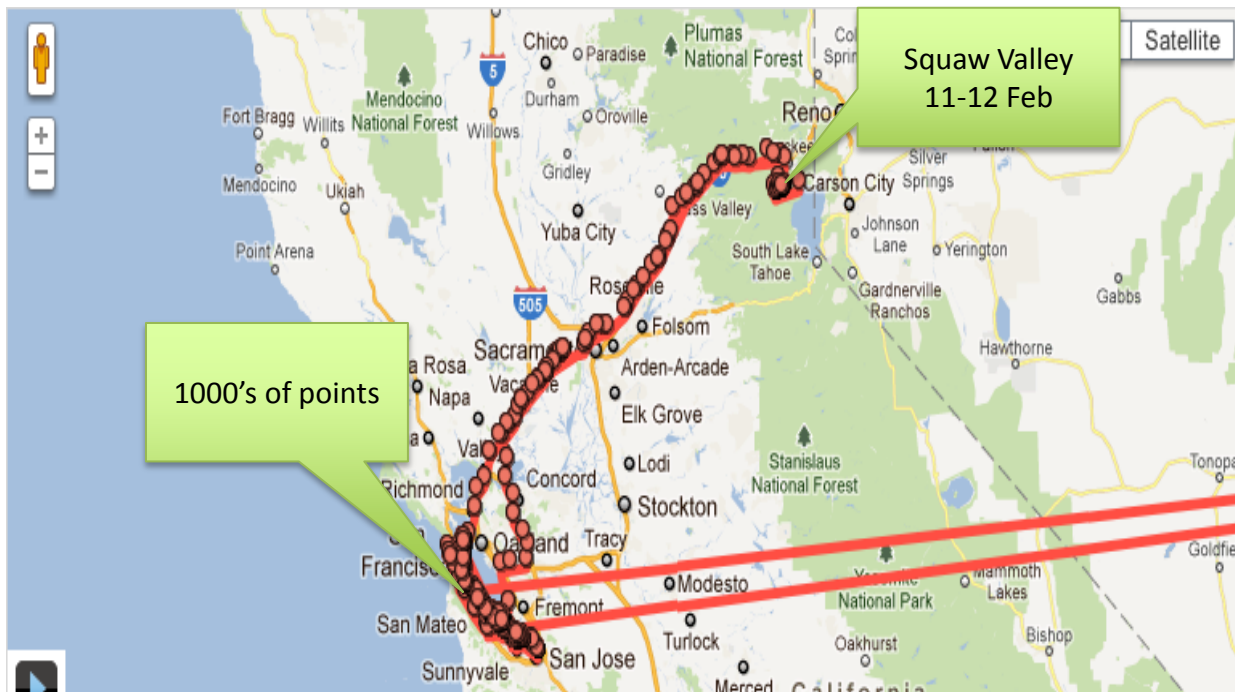
- From California
- In Telecom
- Cheap
- A Swiss Air Traveler



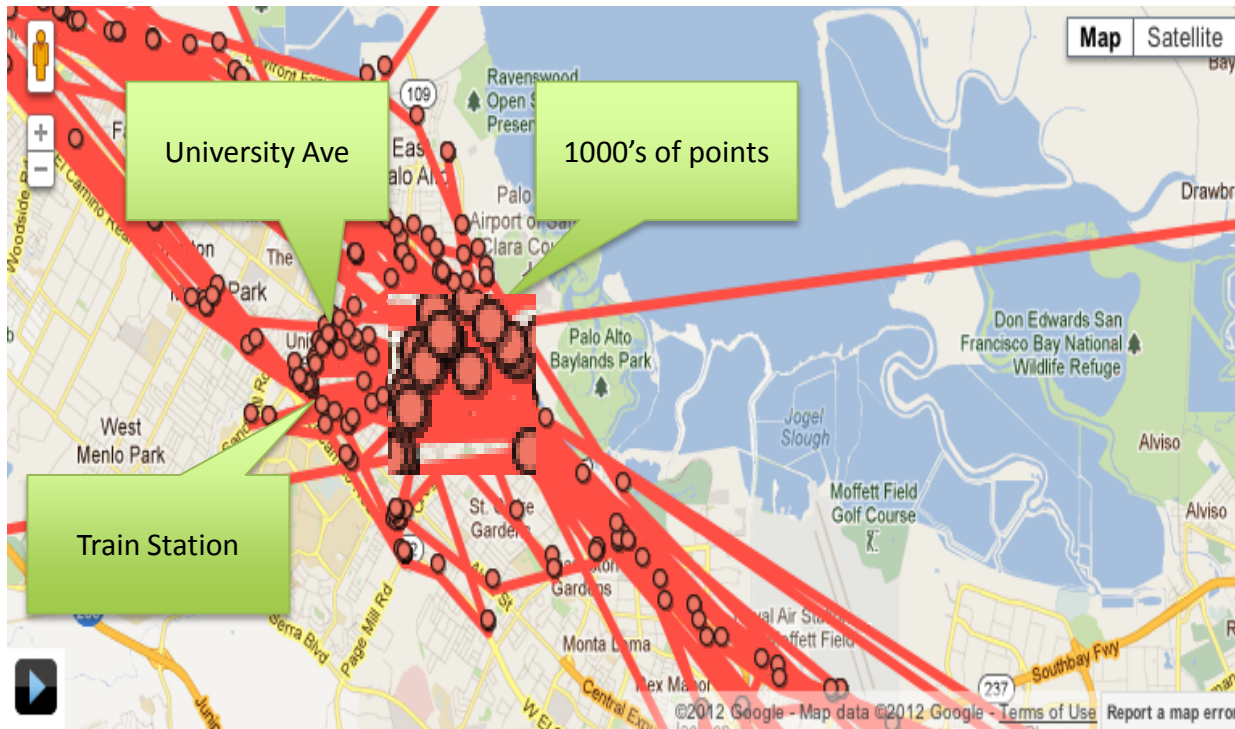
30 Days in My Life

Marc is:

- From California
- In Telecom
- Cheap
- A Swiss Air traveler
- From SF Bay Area
- A skier



30 Days in My Life



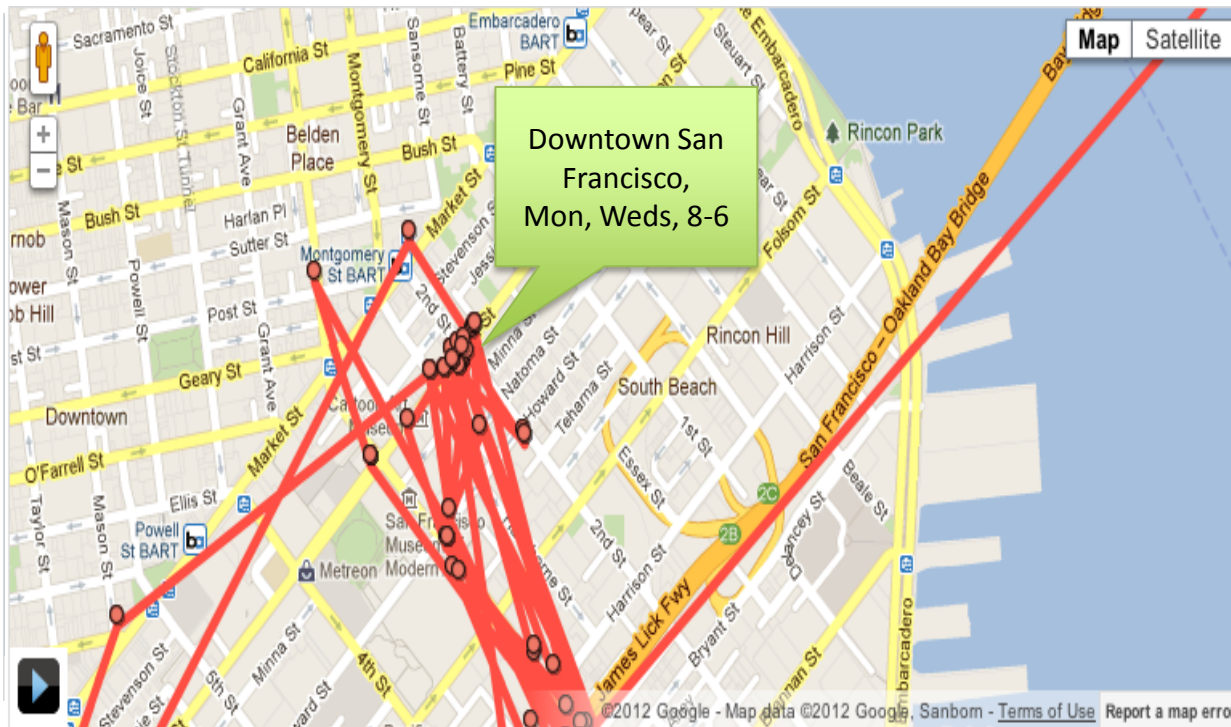
Marc is:

- 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:

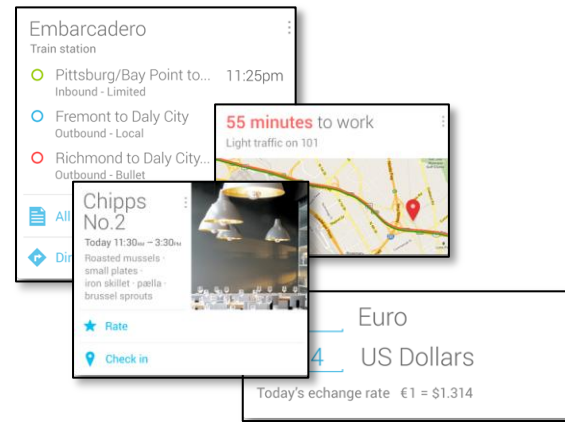
- From California
- In Telecom
- Cheap
- A Swiss Air traveler
- From SF Bay Area
- A skier
- From Palo Alto
- Likes to get coffee on University Ave
- A train rider
- In downtown SF two days/week for work



Where are you going to be?

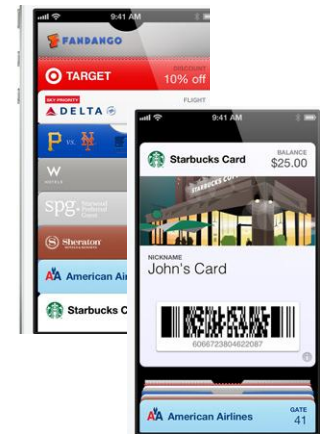
Location Context will drive predictive information pushed to the user, based on location

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



Google Now

Apple Passbook



Google FieldTrip



Social: Adoption & Recommendation

Mo

Mobile

Lo

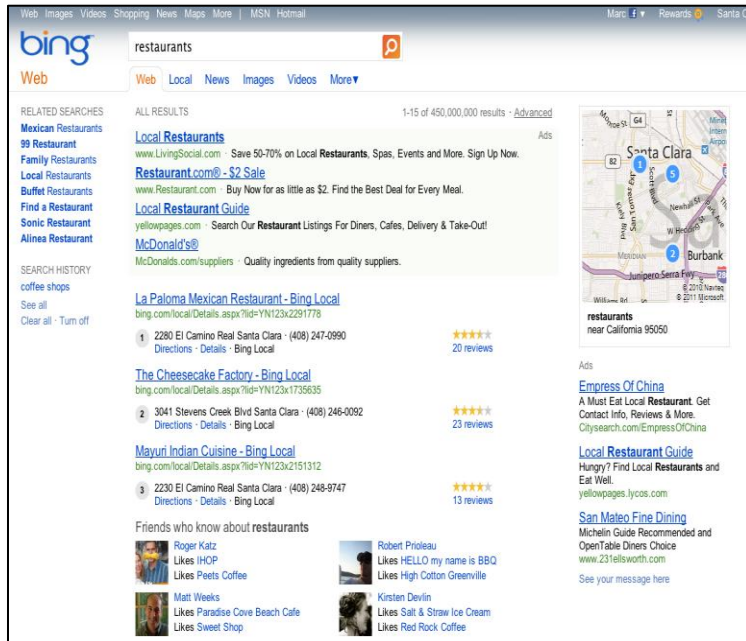
Local

So

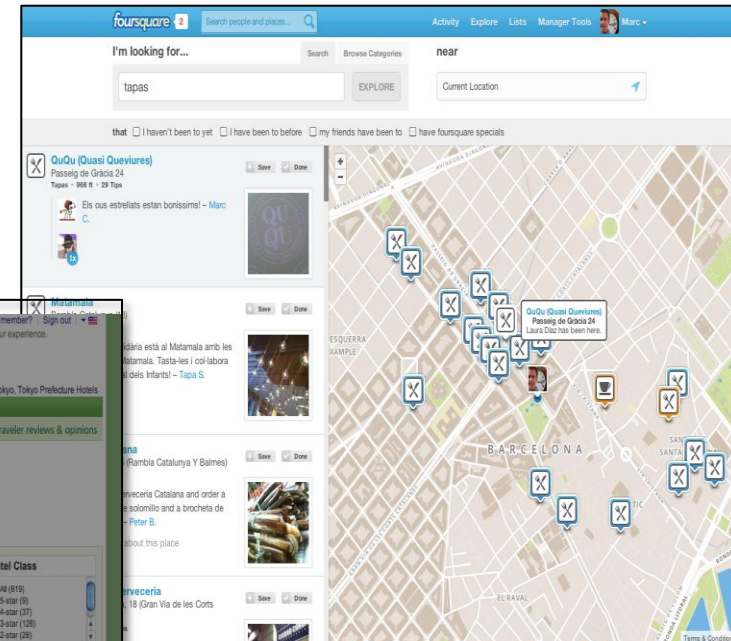
Social

Search becoming Social

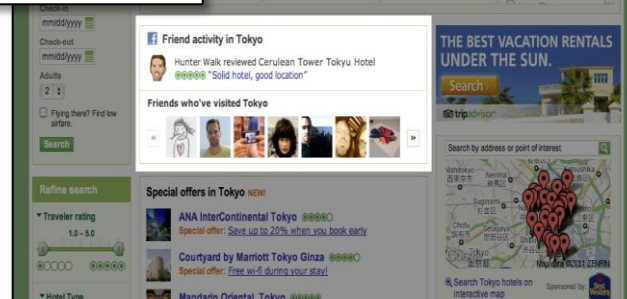
Travel



Search



Reviews



PRIOLEAU ADVISORS

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



Social Recommendations in Search

tripadvisor®

Sumahan on the Water Hotel, Istanbul

Hi, Marc
Sharing Off Your TripAdvisor Sign out

City, hotel name, etc. SEARCH

Home Istanbul Hotels Flights Vacation Rentals Restaurants Things to Do Best of 2012 Your Friends More Write a Review

Home Europe Turkey Istanbul Istanbul Hotels Sumahan on the Water All 772 Istanbul hotels

Danielle Thys has reviewed this hotel. [See their rating...](#)

Send Pin it Tweet

Sumahan on the Water ★★★★★
Kuleli Cad. No:51 Cengelkoy, Uskudar, Istanbul 34684, Turkey (Bosphorus) Hotel amenities Save

Ranked #71 of 772 hotels in Istanbul
167 Reviews
Travelers' Choice® 2012 Winner
Trendiest

Show the lowest price for this hotel*

Check In mm/dd/yyyy Check Out mm/dd/yyyy Adults 2

Show Prices

Booking.com Prestigia.com Hotels.com ORBITZ.com Splendia.com Priceline.com Travelocity

Professional photos 95 traveler photos

See which rooms travelers prefer - 22 traveler tips
167 reviews sorted by Friends first Date Rating English first

Friend's review
"Wow wow wow"
★★★★★ Reviewed July 9, 2012
1 person found this review helpful

Danielle Thys
Oakland, California, United States
Senior Reviewer
★ 9 reviews
Reviews in 6 cities
8 helpful votes

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...

More

Was this review helpful? Yes

Social Structure

- Social is evolving around major “Engagement Platforms” plus many specialized apps
- Building on the engagement platform means:
 - Faster, cheaper distribution
 - Less control over the business model

Social Media Landscape 2012

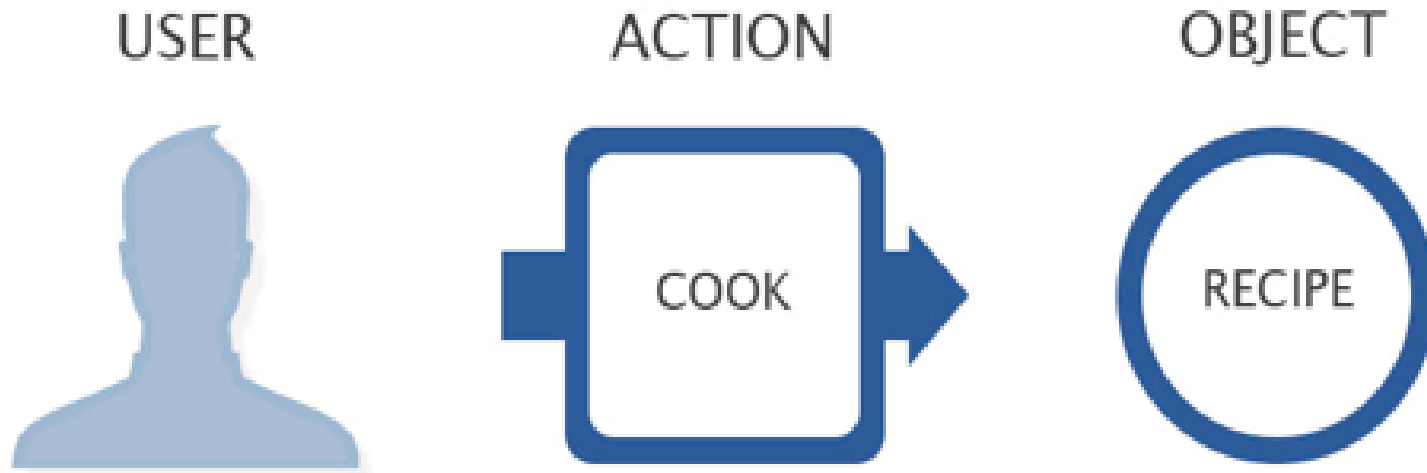


Which Social Network?

- All have slightly different aspects
- Not all will succeed
 - Some may be just proving a market
- Q: Should you build your own Social Network?



Facebook OpenGraph: More than Likes



- OpenGraph allows application developers tie directly into the 800+M Users in the Facebook Social Graph
- Push is on for new Verbs: More specific descriptors of what friends are doing

Twitter?

- Not what you had for breakfast
- Is real-time Micro-Publishing about:
 - Events
 - Traffic/Accidents
 - Offers
 - Sights
- Twitter needs better location filtering



Conclusions

- SoLoMo is a catchy buzzword but should not be considered an indivisible package
- Presence of Giants make it hard, but not impossible to deliver unique value.
- That value is almost always based on:
 - A Unique Community
 - Content
- Social and Location and Mobile should be used to emphasize those components in your offering.

Thank You

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