



OK, I'm Mayor. Now What?

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

Birth of a Market



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

SoLoMo

Social

Local

Mobile



PRIOLEAU ADVISORS

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SoLoMo Case Study: Foursquare



SoLoMo Evolution



Foursquare is the Breakout Mobile App at SXSW

March 16, 2009 by Jennifer Van Grove

61

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

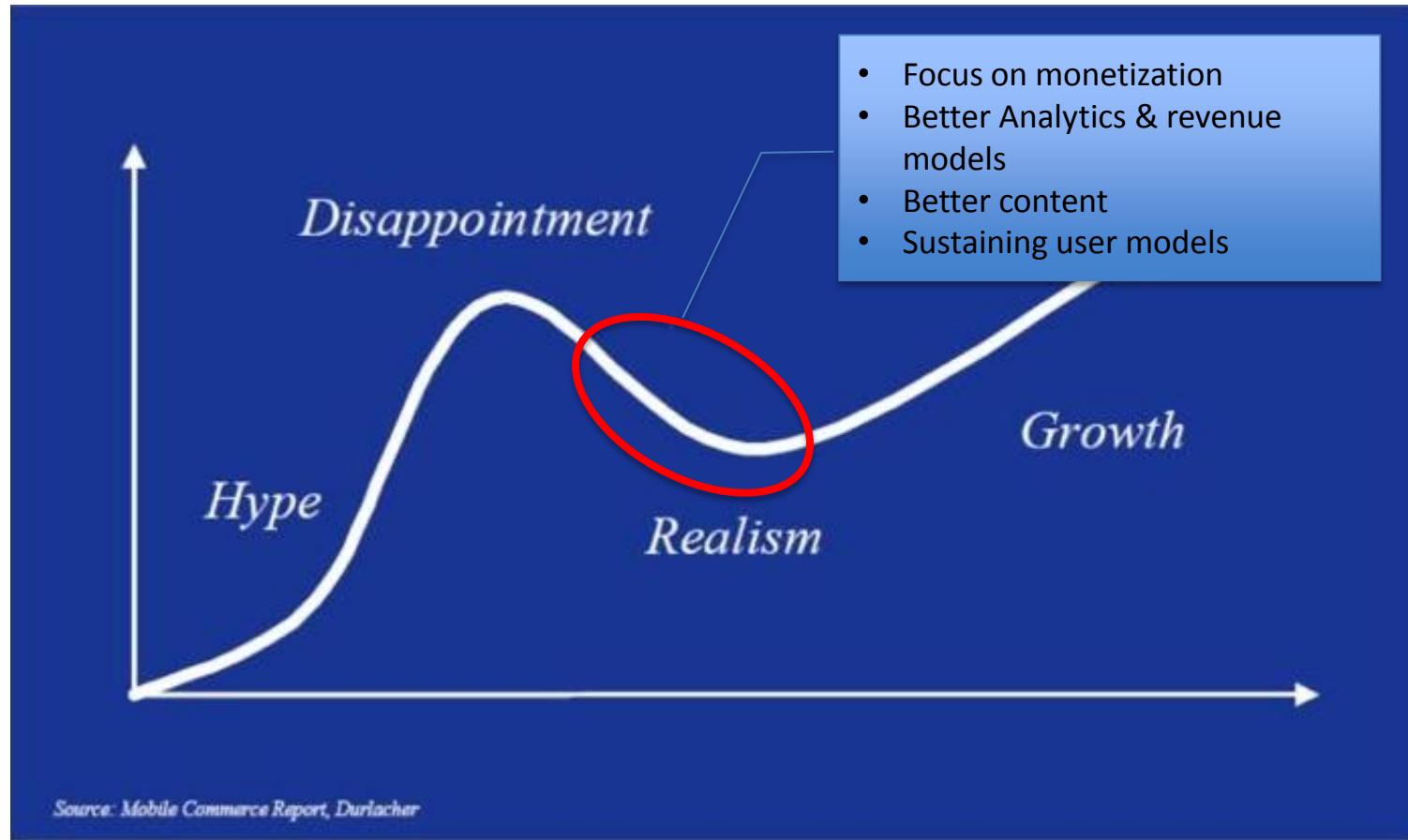
Foursquare Hints At Evolution After Getting \$20 Million

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...

So|LoMo

Social Local Mobile

Mobile: The Basic Platform

MOLOSO

Mobile Local Social

Mobile Has Become Obvious



The Bad News: Monetization

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

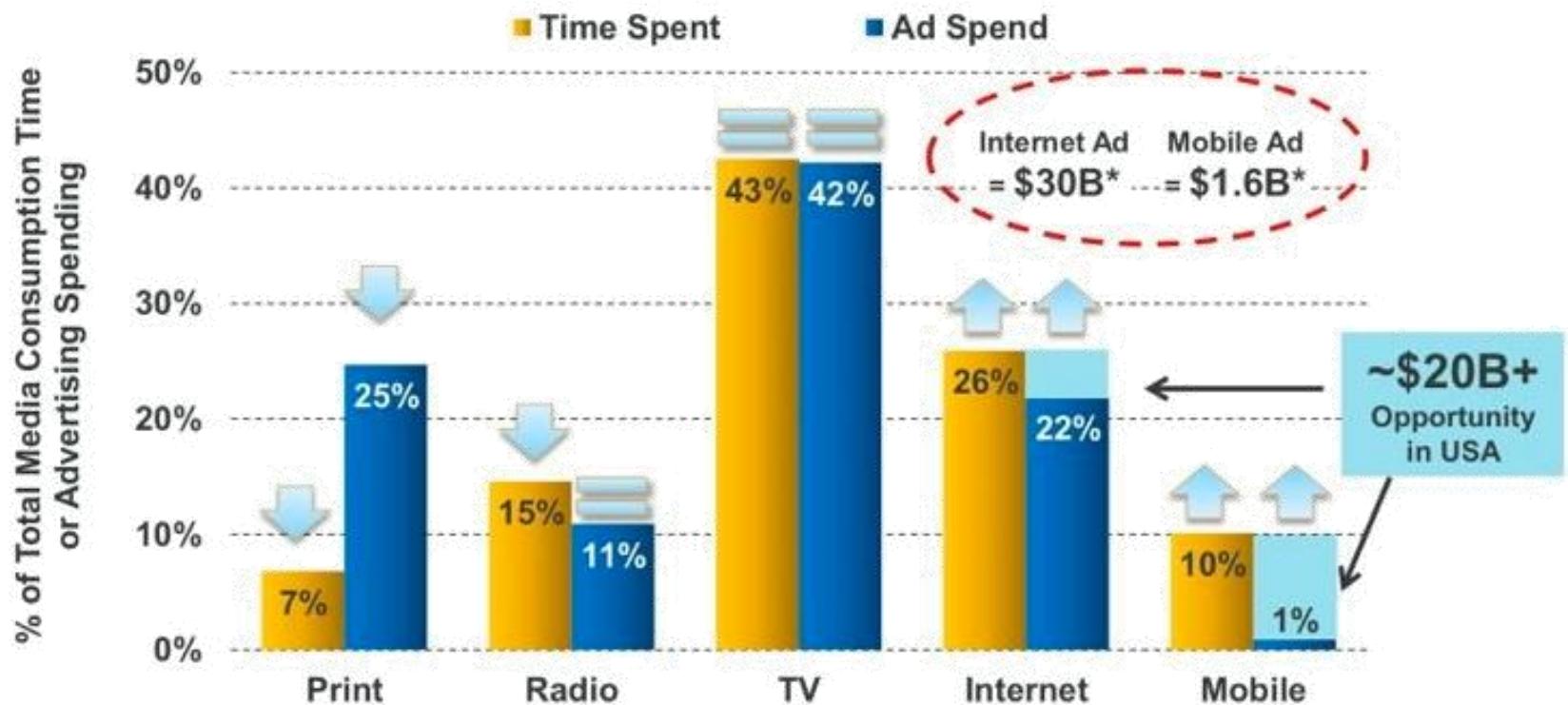


Mobile eCPM by Category



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



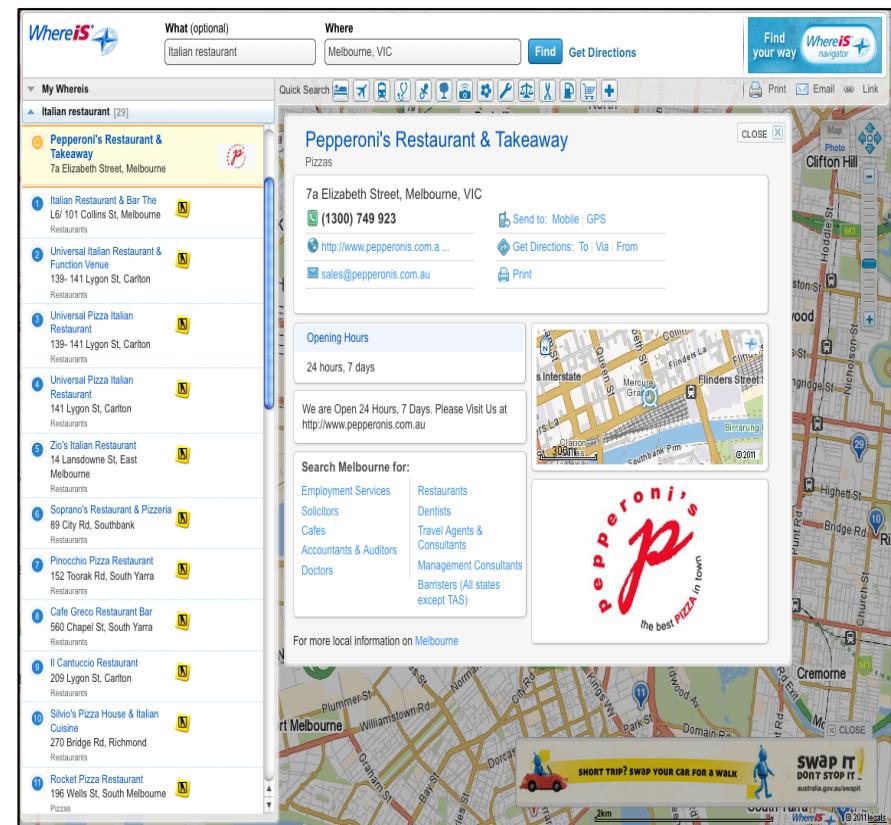
MoLoSo

Mobile Local Social

The diagram consists of a large, bold, dark gray acronym "MoLoSo" centered on a white background. The letters are arranged in three columns: "Mo" on the left, "Lo" in the middle, and "So" on the right. Below the "Mo" and "So" columns are the words "Mobile" and "Social" respectively, in a smaller dark gray font. Between the "Lo" column and the "Mobile" and "Social" labels is the word "Local" in a larger dark gray font. The entire graphic is framed by a thin black border. A large, solid gold horizontal bar is positioned above the diagram.

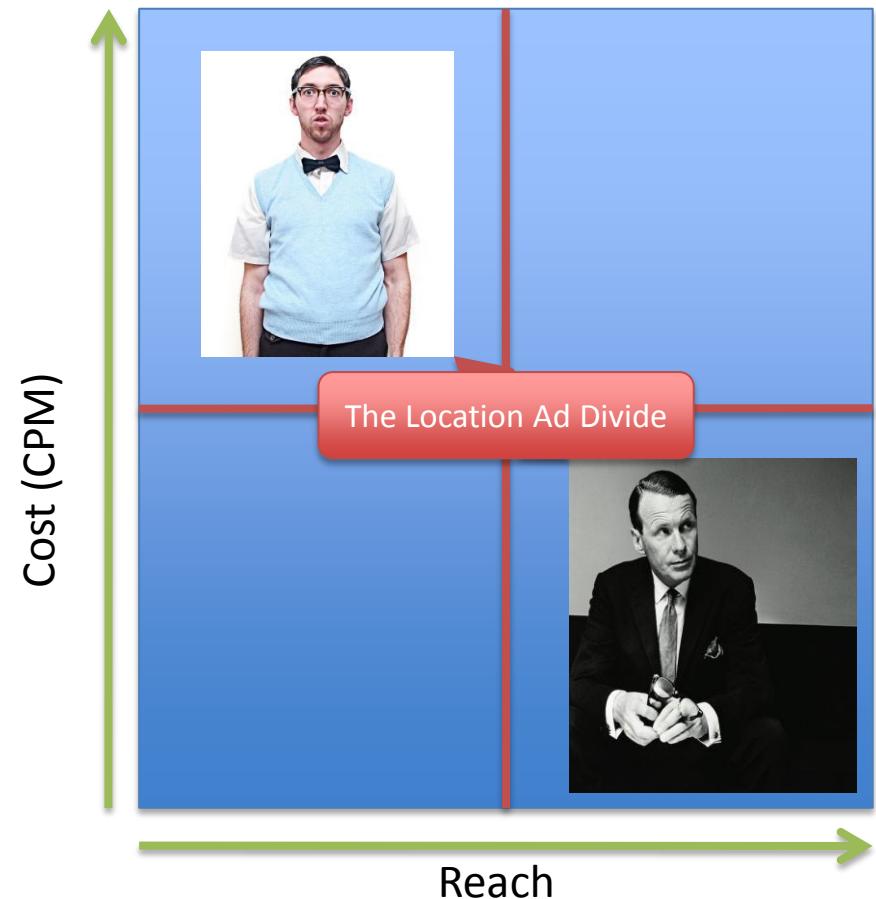
Local Search

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



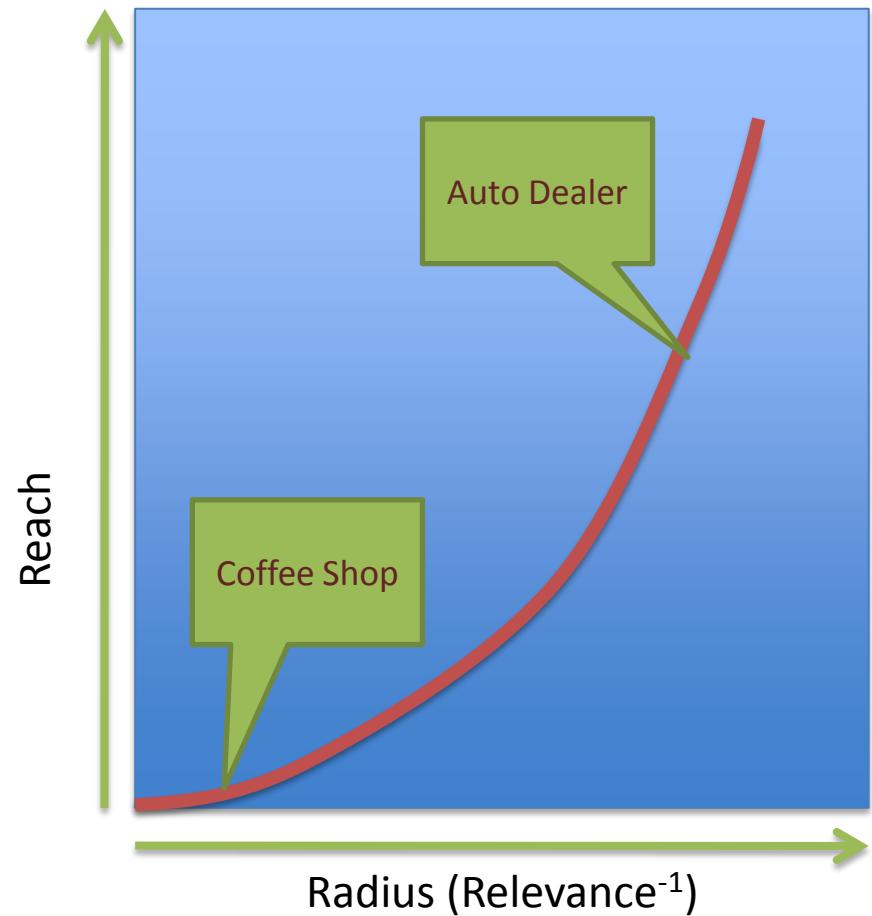
Location-Based Advertising

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

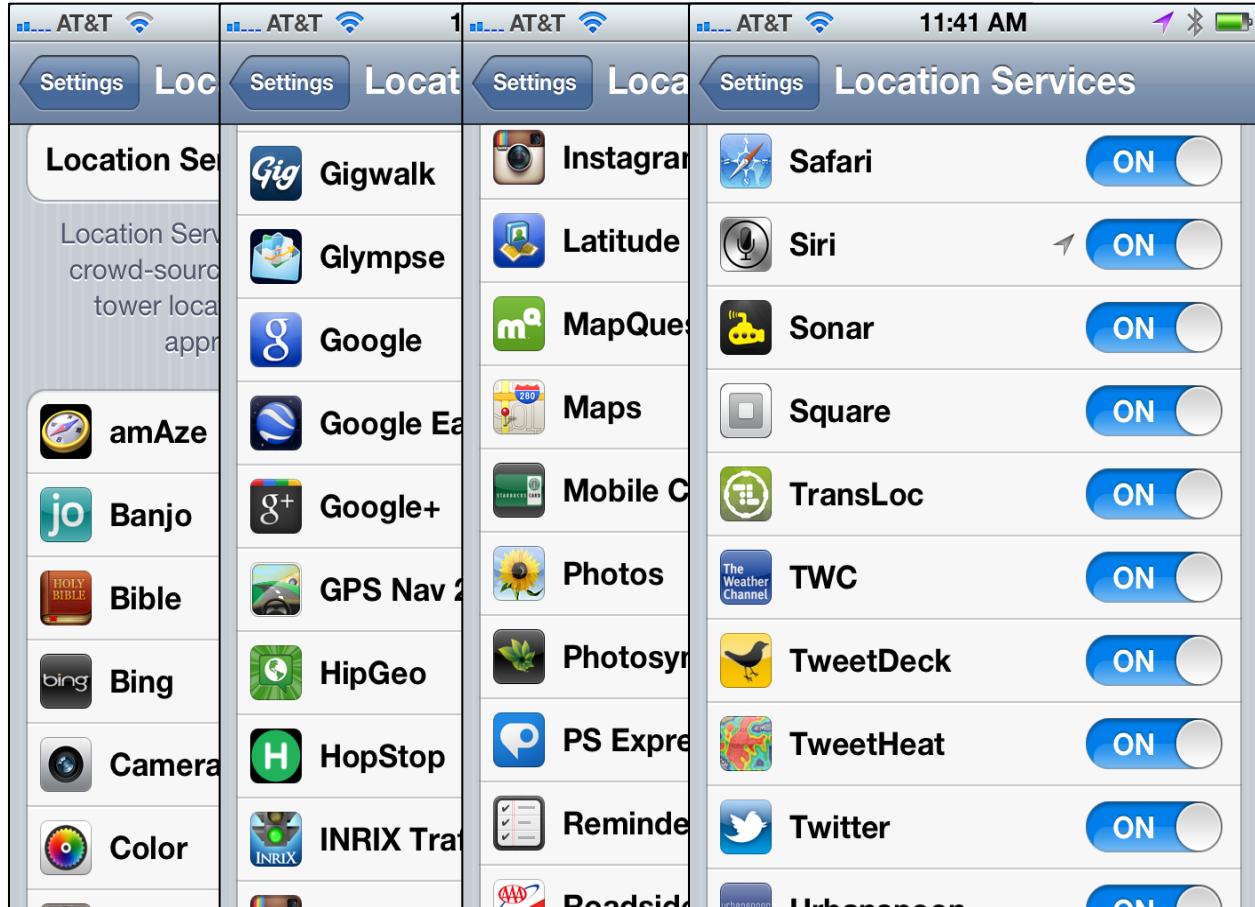
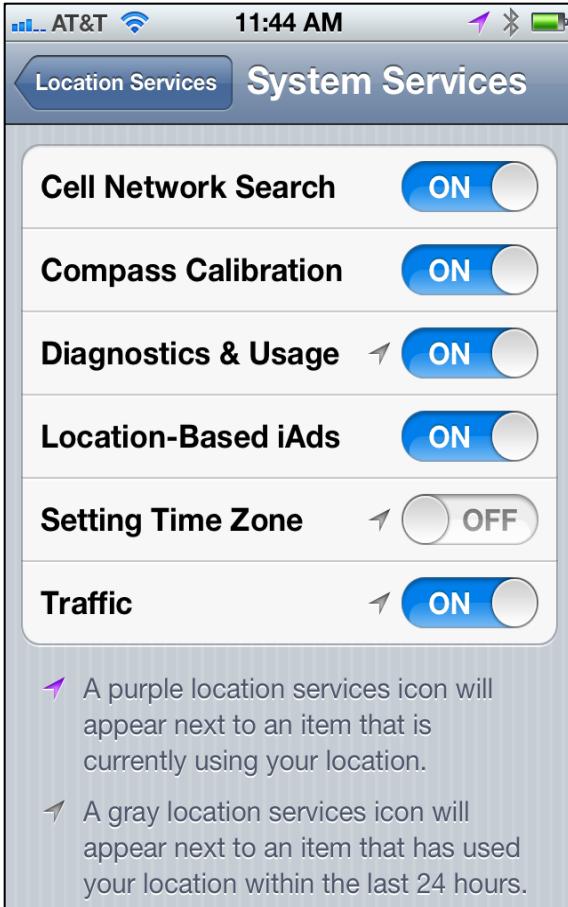


Reach vs Radius (& Relevance)

- 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....



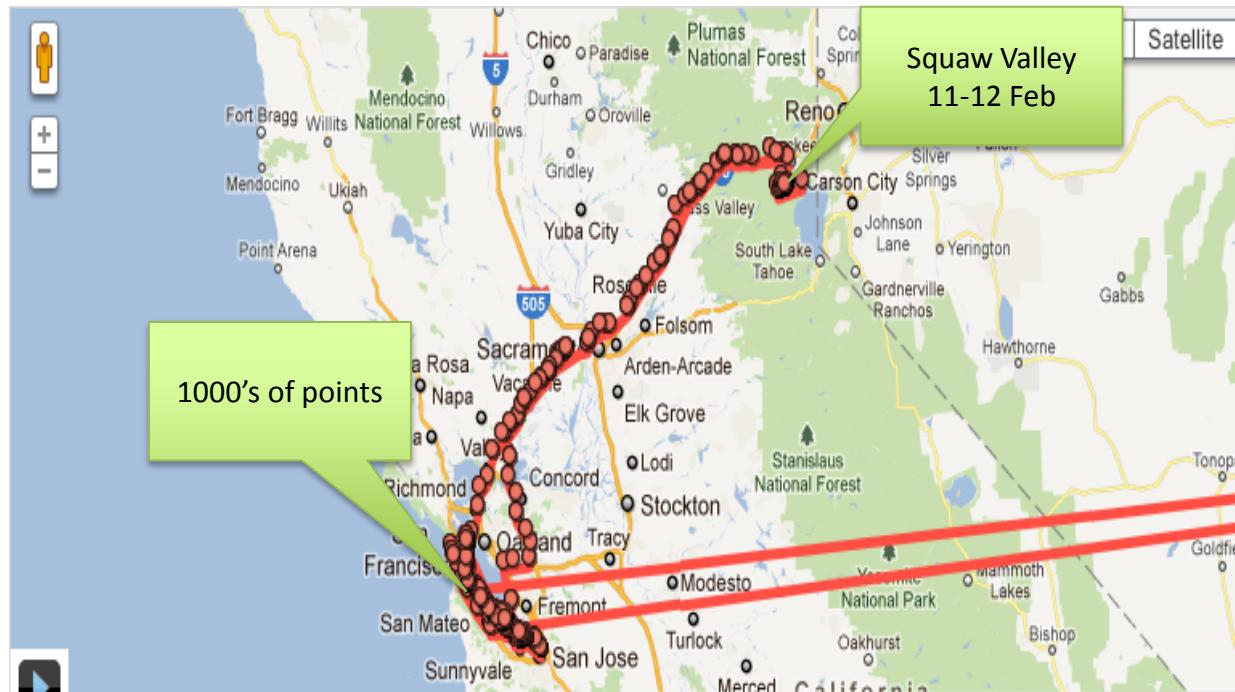
30 Days in My Life

Marc is:

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



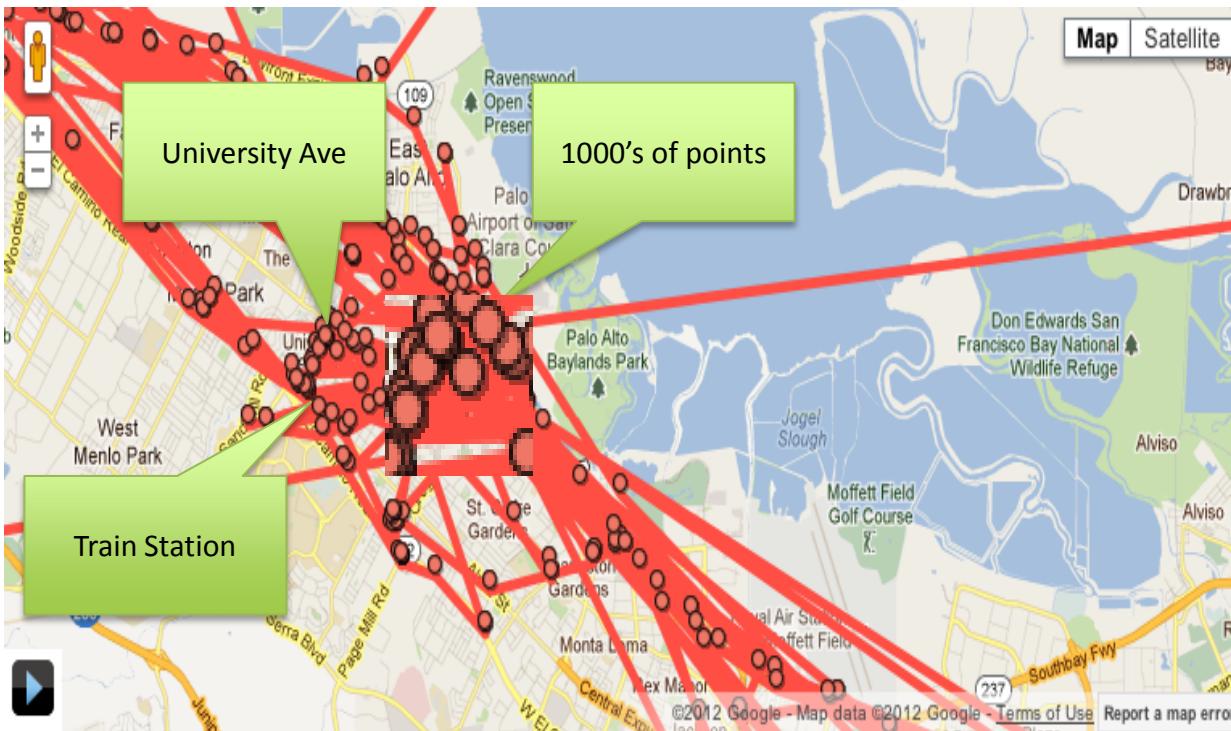
30 Days in My Life



Marc is:

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

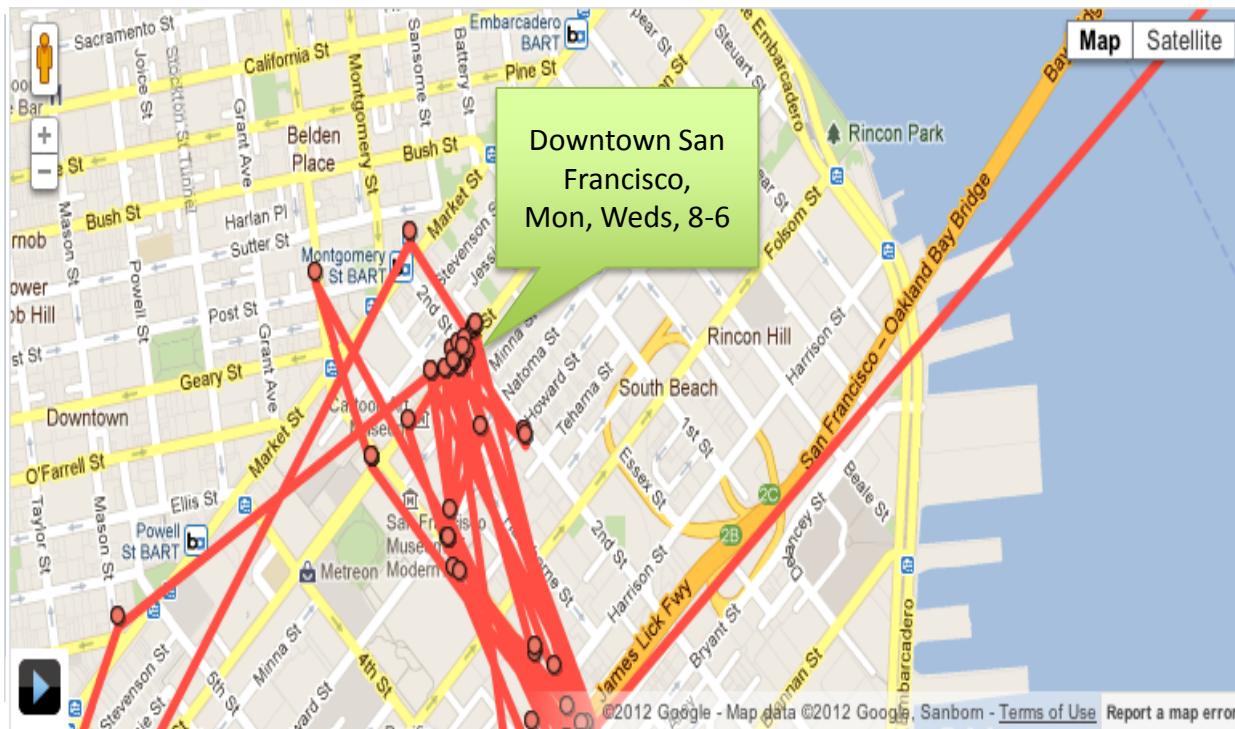
30 Days in My Life



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



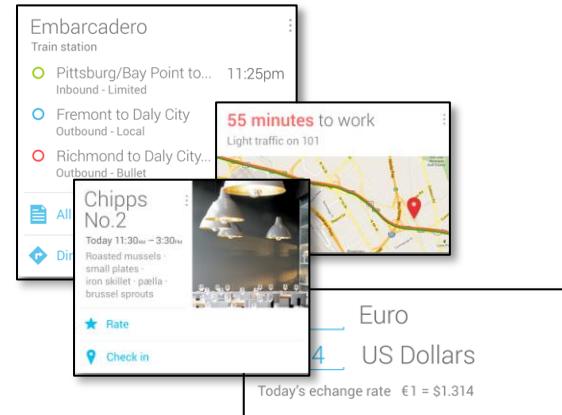
Marc is:

- 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?

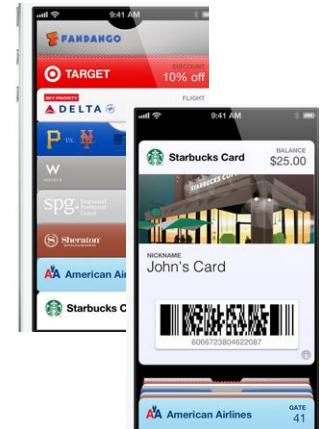
Location Context will drive predictive information pushed to the user, based on location

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



Google Now

Apple Passbook



Google FieldTrip



Social: Adoption & Recommendation

Mo Lo

Mobile

Lo

Local

So

Social

Search becoming Social

[Web](#) [Images](#) [Videos](#) [Shopping](#) [News](#) [Maps](#) [More](#) | [MSN](#) [Hotmail](#)

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La Paloma Mexican Restaurant - Bing Local
[bing.com/local/Details.aspx?h=YNT2xk2291778](#)
1 2280 El Camino Real Santa Clara - (408) 247-0990
Directions · Details · Bing Local
★★★★★ 20 reviews

The Cheesecake Factory - Bing Local
[bing.com/local/Details.aspx?h=YNT2xk1735635](#)
2 3041 Stevens Creek Blvd Santa Clara - (408) 246-0092
Directions · Details · Bing Local
★★★★★ 23 reviews

Mayuri Indian Cuisine - Bing Local
[bing.com/local/Details.aspx?h=YNT2xk2151312](#)
3 2230 El Camino Real Santa Clara - (408) 248-9747
Directions · Details · Bing Local
★★★★★ 13 reviews

Friends who know about restaurants

 Roger Katz Likes IHOP Likes Peets Coffee

 Matt Weeks Likes Paradise Cove Beach Cafe Likes Sweet Shop

 Robert Priolet Likes HELLO my name is BBQ Likes High Cotton Greenville

 Kirsten Devin Likes Salt & Straw Ice Cream Likes Red Rock Coffee

Ads

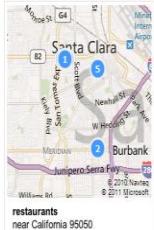
Local Restaurants Save 50-70% on Local Restaurants, Spas, Events and More. Sign Up Now.

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[Local Restaurant Guide](#) Search Our Restaurant Listings For Diners, Cafes, Delivery & Take-Out!

[McDonald's®](#) Quality ingredients from quality suppliers.

restaurants near California 95050



Search

Friend activity in Tokyo
 Hunter Walk reviewed Cerulean Tower Tokyo Hotel **★★★★★** "Solid hotel, good location"

Friends who've visited Tokyo

Special offers in Tokyo **NEW**

 **ANA InterContinental Tokyo** **★★★★**
Special offer: *Save up to 20% when you book early*

 **Courtyard by Marriott Tokyo Ginza** **★★★★**
Special offer: *Free wifi during your stay!*

 **Mandarin Oriental, Tokyo** **★★★★**

Search by address or point of interest



I'm looking for... **tapas**

near **near**

near **Current Location**

QuoQu (Quasi Quesueries) Passeig de Gracia 24 Tel: +34 93 25 25 25 25 Tip: *Els ous estrellats estan bonissims!* - Marc

Matamala Passeig de Gracia 24 Tel: +34 93 25 25 25 25 Tip: *Matamala està al Matamala amb les matamala. Tasta-les i colabora amb els infants! - Tapa S.*

ESQUERRA XAMPLE Passeig de Gracia 24 Tel: +34 93 25 25 25 25 Tip: *QuoQu (Quasi Quesueries) Passeig de Gracia 24 Laura Diaz has been here.*

BARCELONA Passeig de Gracia 24 Tel: +34 93 25 25 25 25 Tip: *QuoQu (Quasi Quesueries) Passeig de Gracia 24 Laura Diaz has been here.*

SAN SANTA MARIA Passeig de Gracia 24 Tel: +34 93 25 25 25 25 Tip: *QuoQu (Quasi Quesueries) Passeig de Gracia 24 Laura Diaz has been here.*

TIC Passeig de Gracia 24 Tel: +34 93 25 25 25 25 Tip: *QuoQu (Quasi Quesueries) Passeig de Gracia 24 Laura Diaz has been here.*

EL Raval Passeig de Gracia 24 Tel: +34 93 25 25 25 25 Tip: *QuoQu (Quasi Quesueries) Passeig de Gracia 24 Laura Diaz has been here.*

TERME I GIRONA Passeig de Gracia 24 Tel: +34 93 25 25 25 25 Tip: *QuoQu (Quasi Quesueries) Passeig de Gracia 24 Laura Diaz has been here.*

ICMA **International Classified Media Association**
Making classified media work better!

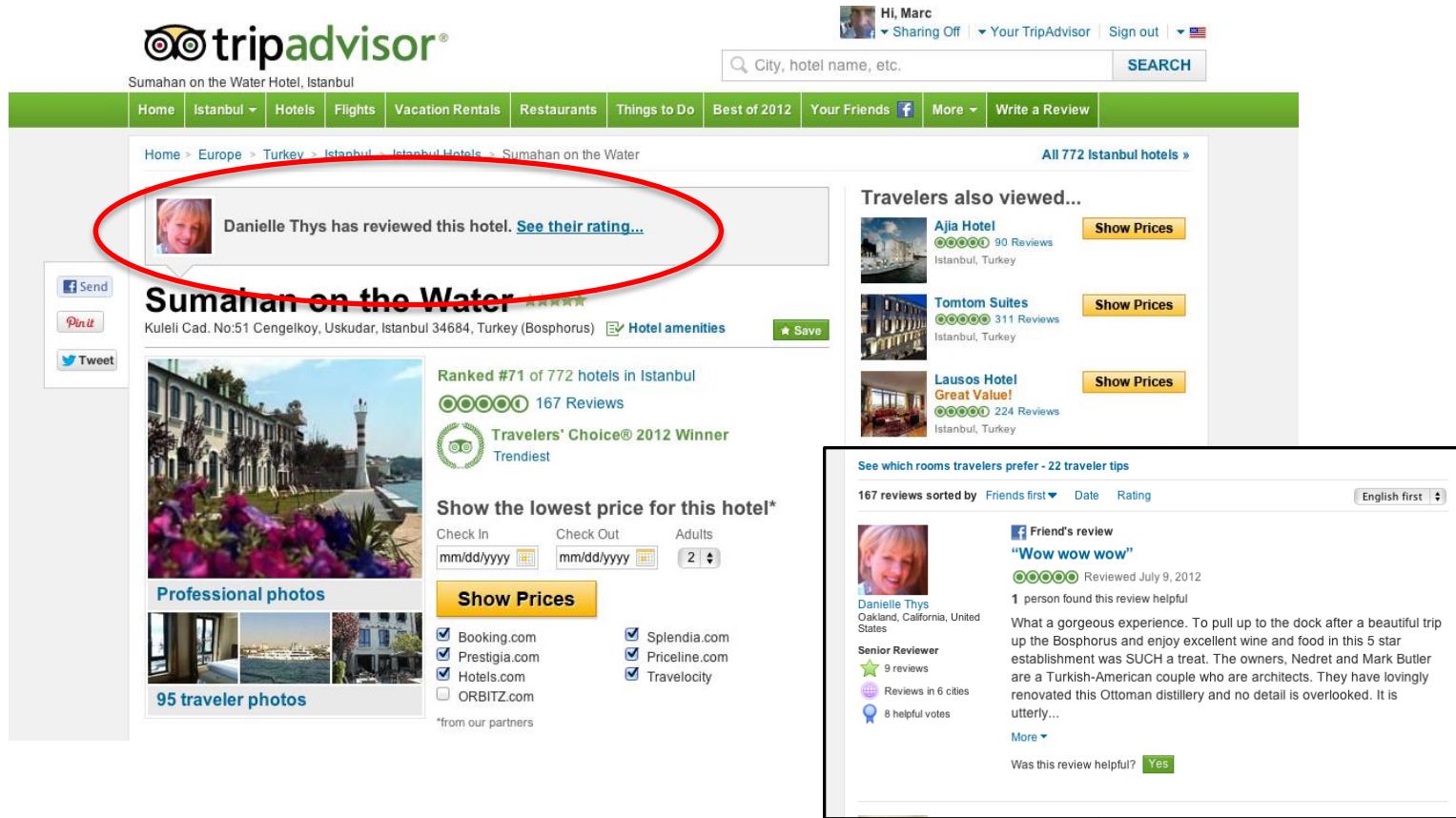
Reviews

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



The screenshot shows the TripAdvisor website for the Sumahan on the Water Hotel in Istanbul. At the top, there is a navigation bar with 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 shows the hotel's profile with a photo, 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, there is a section for "Professional photos" showing three images and a link to "95 traveler photos". To the right, there is a sidebar titled "Travelers also viewed..." with links to Ajia Hotel, TomTom Suites, and Lausos Hotel, each with a "Show Prices" button. At the bottom, there is a section titled "See which rooms travelers prefer - 22 traveler tips" with a list of reviews and a "More" link.

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

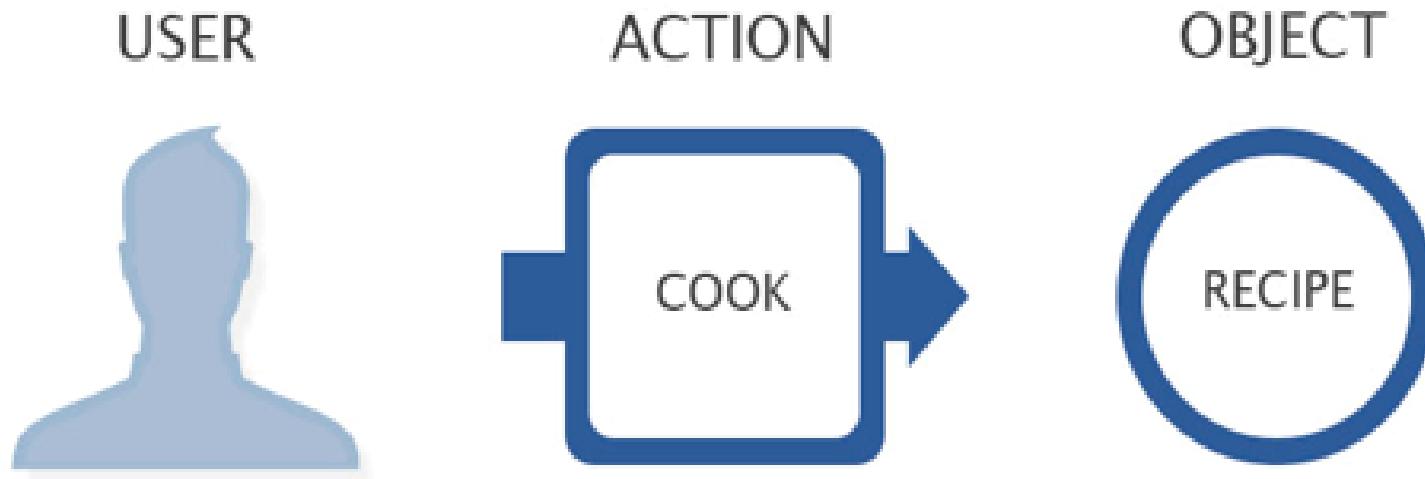


Which Social Network?

- 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.



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Making classified media work better!
International Classified Media Association

Thank You

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www.prioleauadv.com