

Location-Based Marketing in the Smartphone Era



Mike Boland
Chief Analyst & VP, Content
BIA/Kelsey

About BIA/Kelsey

Leading in Local

Market Intelligence

- Industry forecasts, market data, defining the collision of technology and media.

Strategic Consulting

- Custom research, market vetting, tactical analysis, brand/product positioning

Conferences

- A-List events for tech & media execs

Content Publishing

- White papers, ad forecasts, vertical reports, webinars, blogging, newsletter



Agenda

- **Mobile & Local: By the Numbers**
- **Local: It's all about *Calls to Action***
- **Local: It's all About *Social***
- **Local: It's all About *Content Marketing***
- **How Does Vision Care Stack Up?**

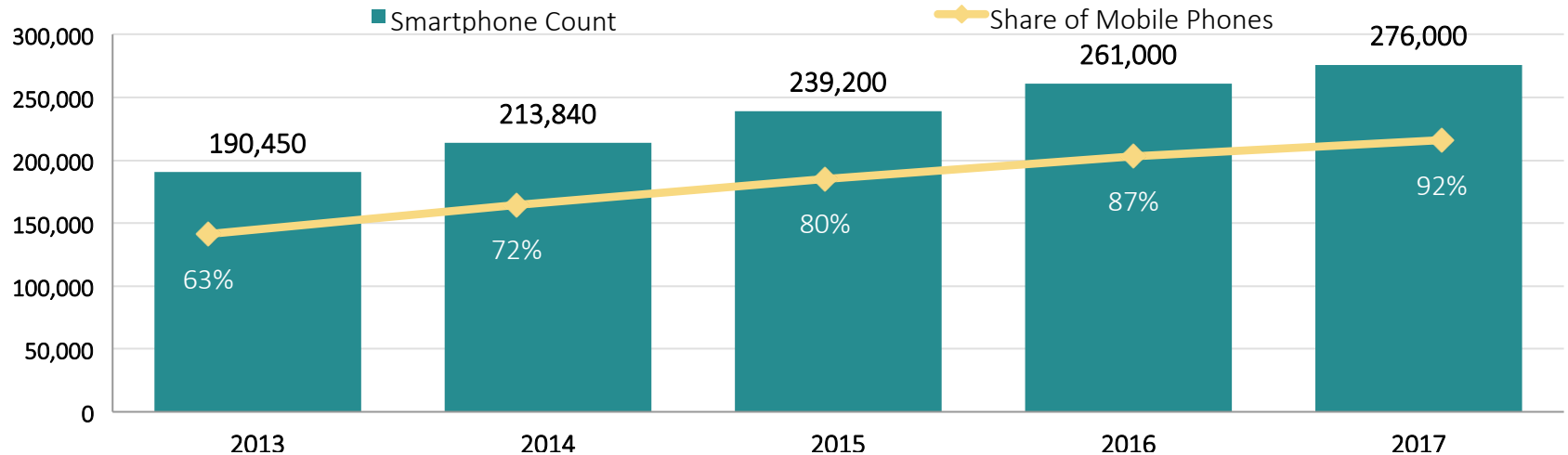
Agenda

- **Mobile & Local: By the Numbers**
- **Local: It's all about *Calls to Action***
- **Local: It's all About *Social***
- **Local: It's all About *Content Marketing***
- **How Does Vision Care Stack Up?**

Mobile Usage: Where are we now?

- U.S. Smartphone penetration = 77%
- 50% of search query volume is mobile
- 50% of mobile search is local

Compares to 20% on Desktop



Source: BIA/Kelsey, 2015

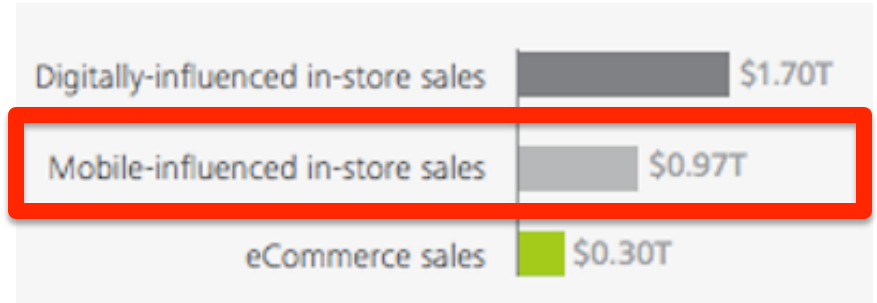
70%



(Retail spending that is e-commerce)

... The Rest is Offline in the Real World

But it's increasingly *influenced* online and in mobile

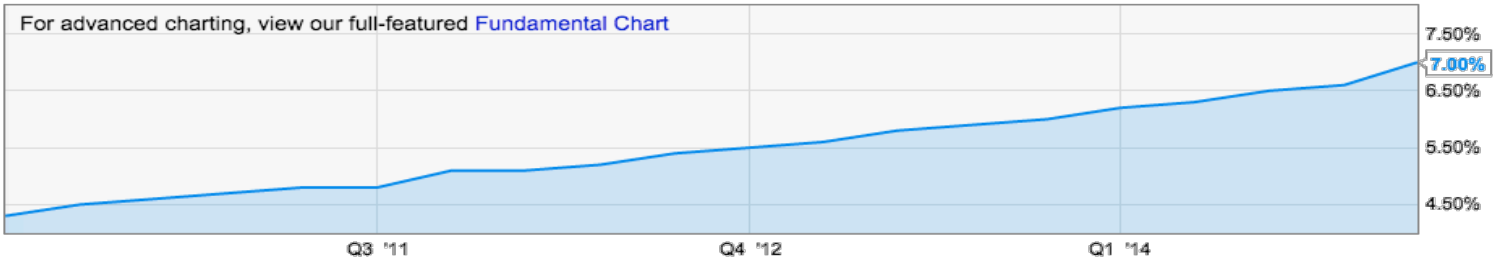


US E-Commerce Sales as Percent of Retail Sales Chart

[View Full Chart](#)

5d 1m 3m 6m YTD 1y 5y 10y Max

[Export Data](#) [Save Image](#)

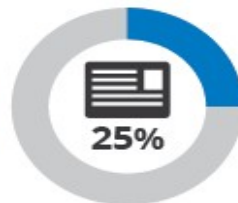


Mobile Search = High Intent

MOBILE SEARCH DRIVES VALUABLE OUTCOMES FOR BUSINESSES



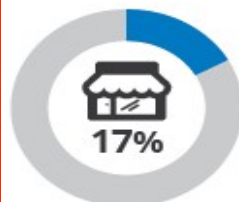
Continued Research



Visited a Retailer's
Website



Shared Information



Visited a Store



Made a Purchase



Called a Business

...And Quickly

I MOBILE SEARCHES TRIGGER QUICK FOLLOW-UPS



63% of mobile search-triggered actions occur **within 1 hour** of the initial search

55%



OF PURCHASE-RELATED CONVERSIONS OCCUR
WITHIN 1 HOUR OF INITIAL MOBILE SEARCH

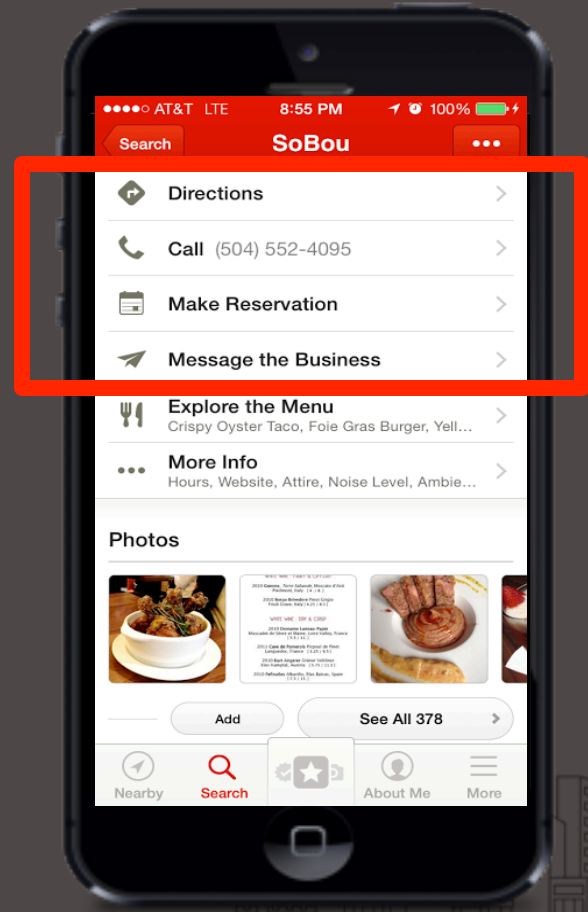
Source: Google, 2013



The Lesson:
**Capture that local
intent (...but how?)**

Expanding ways to engage with local customers

- Reservations/scheduling
- Ordering
- Messaging
- Click-to-call
- Real-time Inventory
- Photos
- Videos
- Calls to Action



Agenda

- Mobile & Local: By the Numbers
- Local: It's all about *Calls to Action*
- Local: It's all About *Social*
- Local: It's all About *Content Marketing*
- How Does Vision Care Stack Up?

Example: Phone Calls are *the New Click*

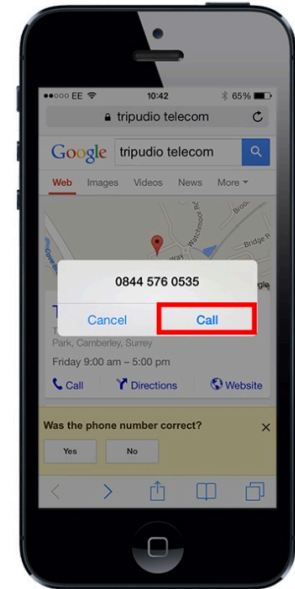
- Smartphones drive voice and call activity
 - Hardware realities (voice input, dialer)
 - High transaction intent
 - Products that have complexity
 - Autos***
 - Healthcare/medical***
 - Financial services***



Google Adwords



Google Organic



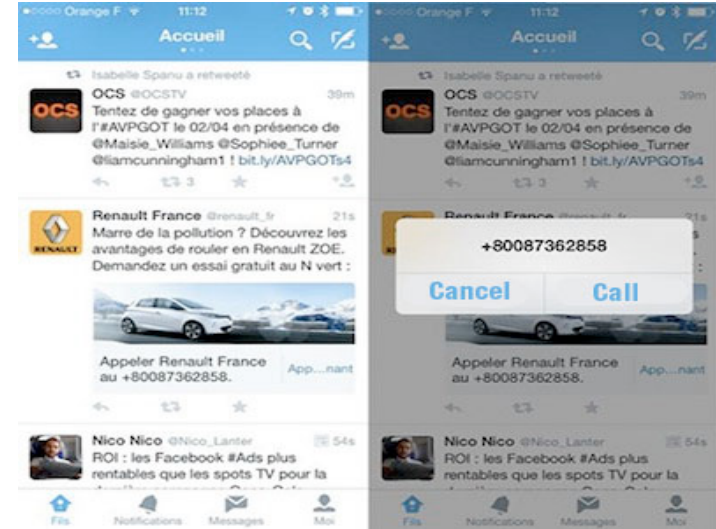
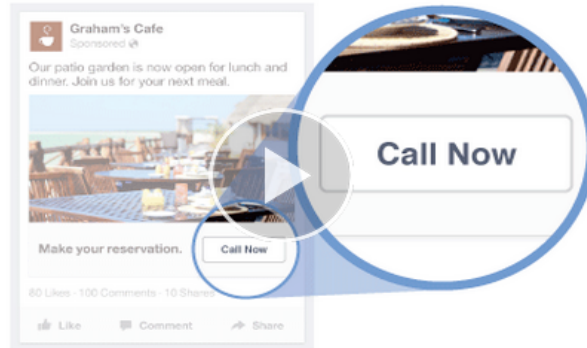
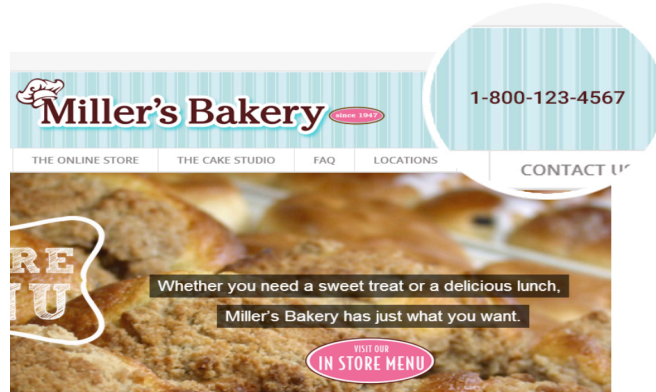
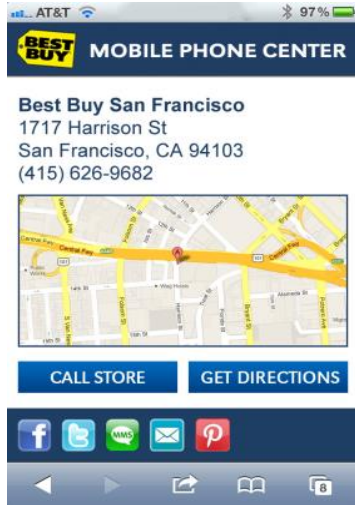
Click-To-Call Example

The Need For Human Interaction Persists... Even in a Digital World

“Because something like life insurance is a complex purchase, [consumers] don't want to fill out a form, they want to call a number... An even better example is home health care. **If you are going to find somebody to help watch Mom, you're *talking* to them; you're not doing that over the web.”**

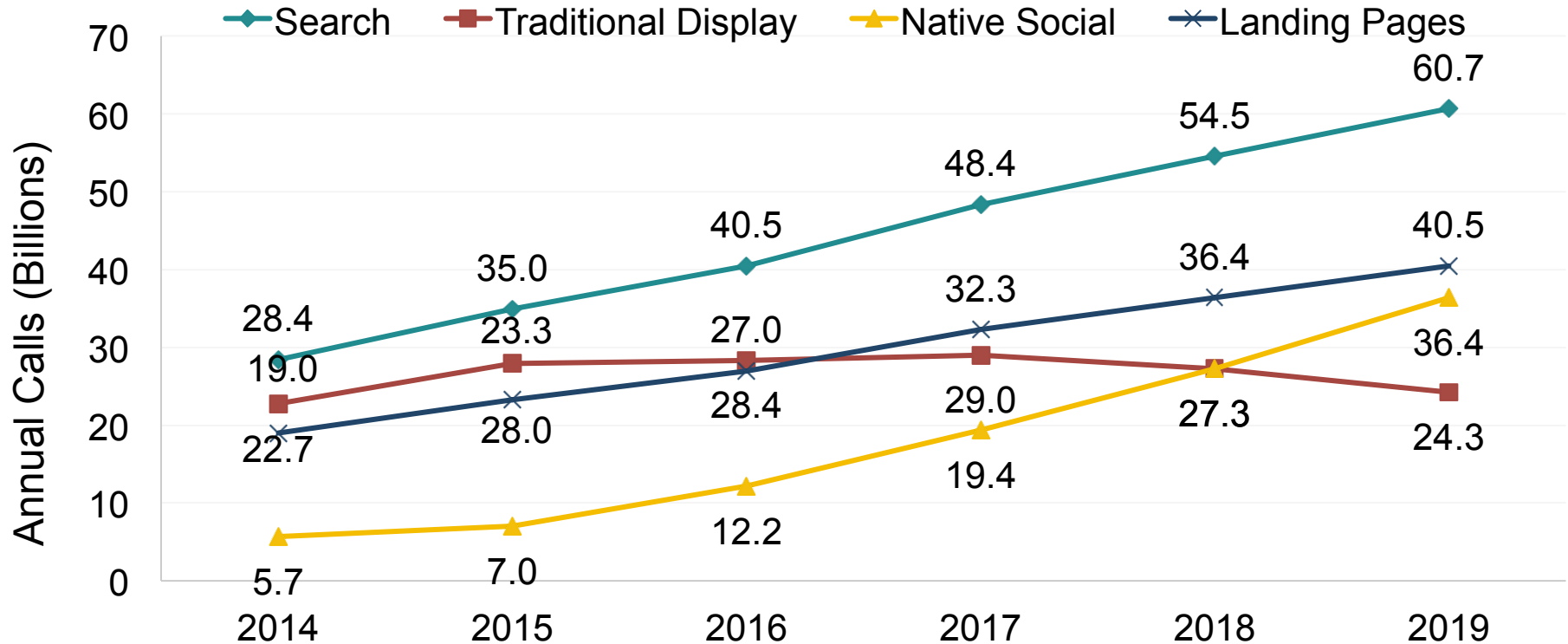
- Irv Shapiro, CEO, DialogTech

All the Places a Phone Number Can Show Up



The Result: An Explosion of Phone Calls

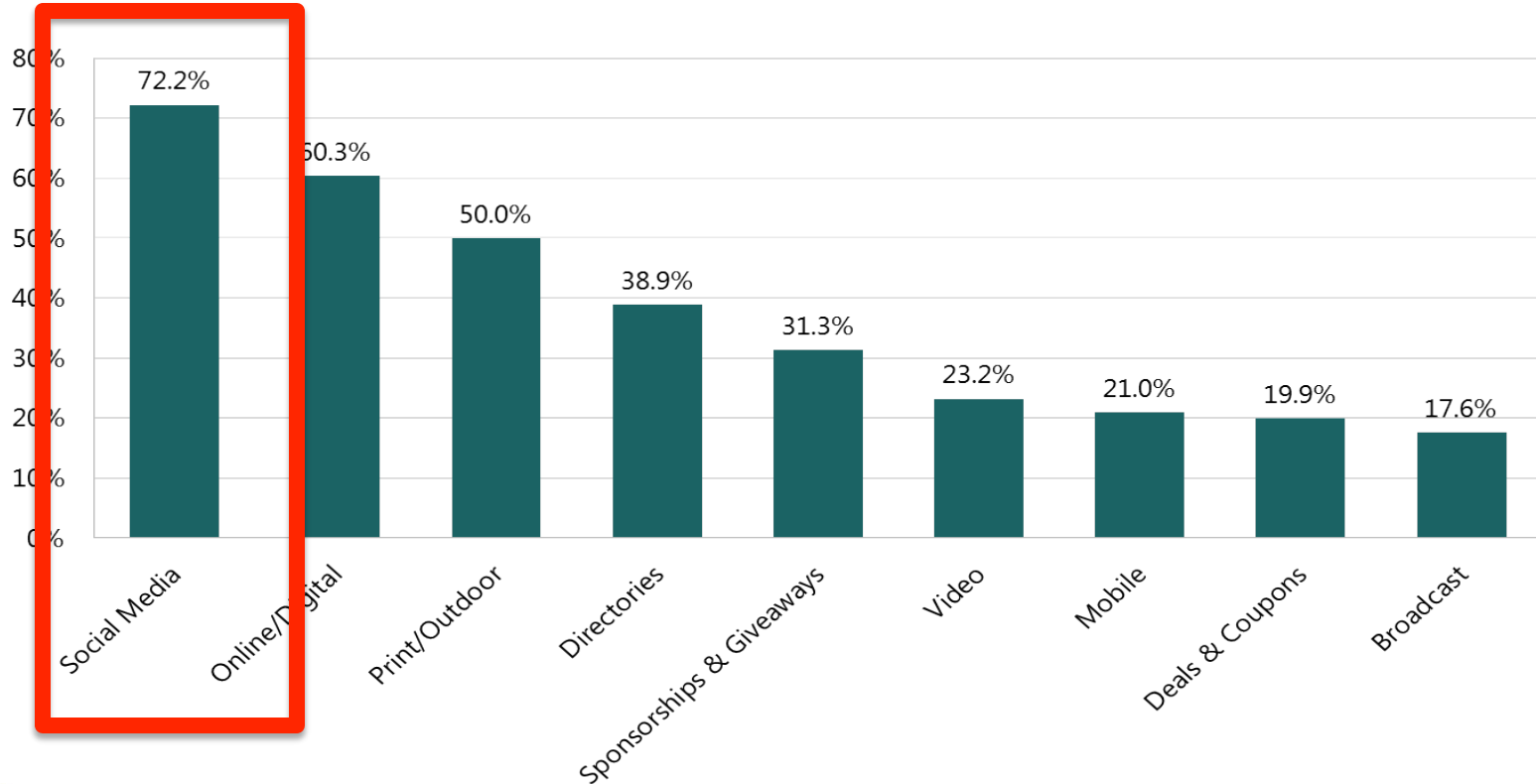
93B annual calls from mobile today, growing to 162B by 2019



Agenda

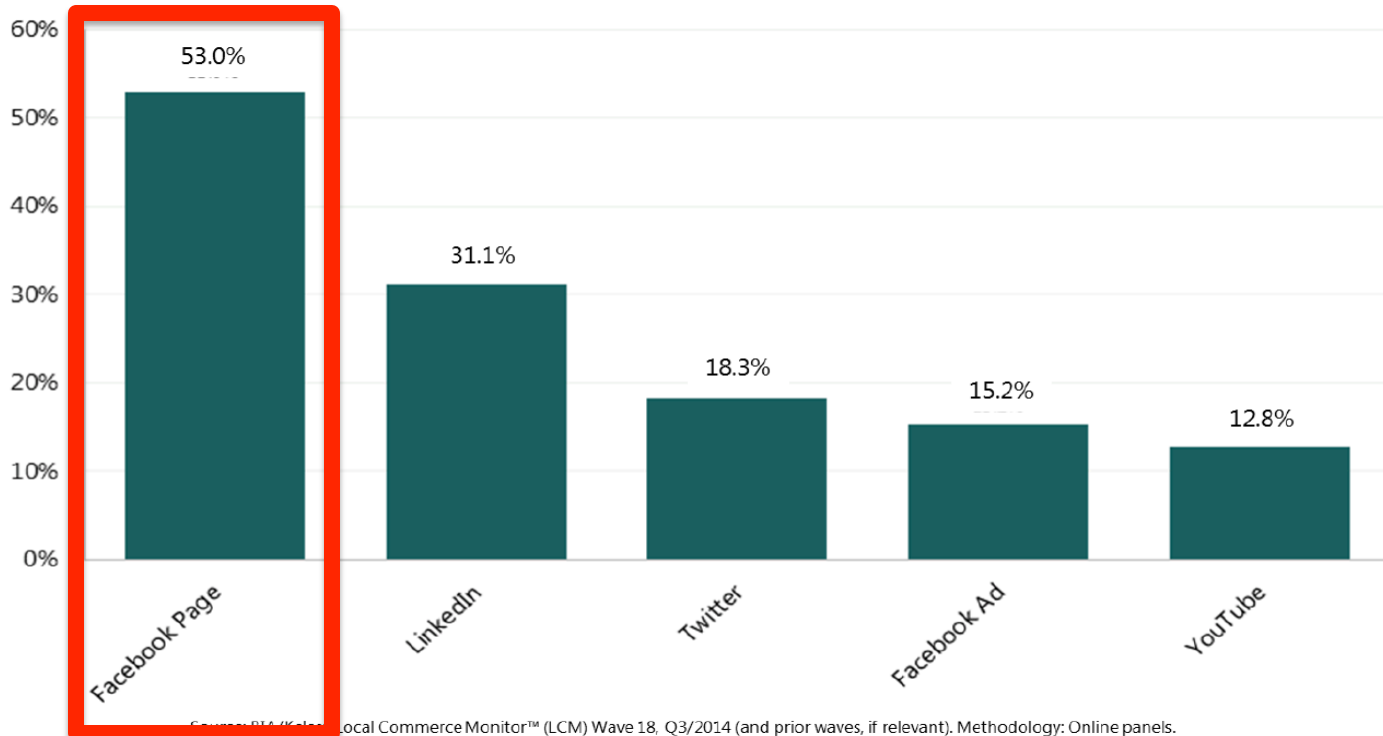
- Mobile & Local: By the Numbers
- Local: It's all about *Calls to Action*
- **Local: It's all About *Social***
- Local: It's all About *Content Marketing*
- How Does Vision Care Stack Up?

Social Media: the #1 Local Marketing Tool



Facebook Pages Dominate

Figure 2 - Top 5 Social Media Used for Advertising & Promotion

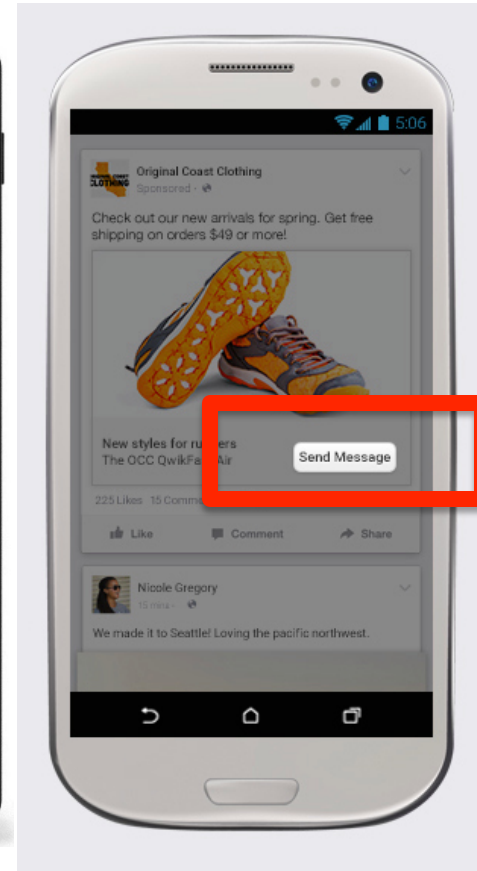
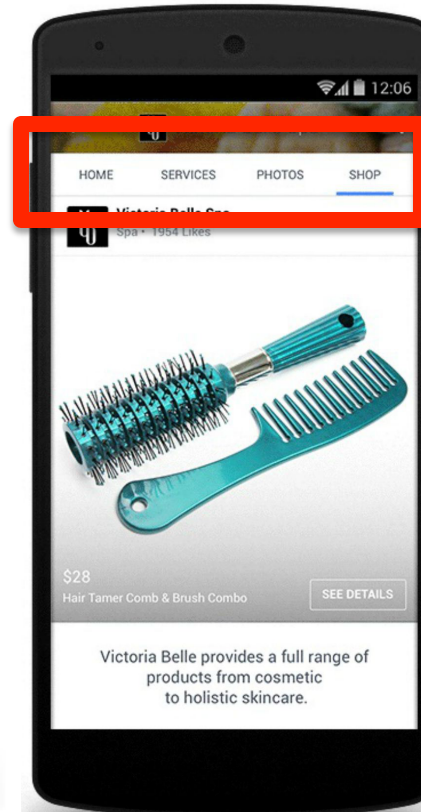
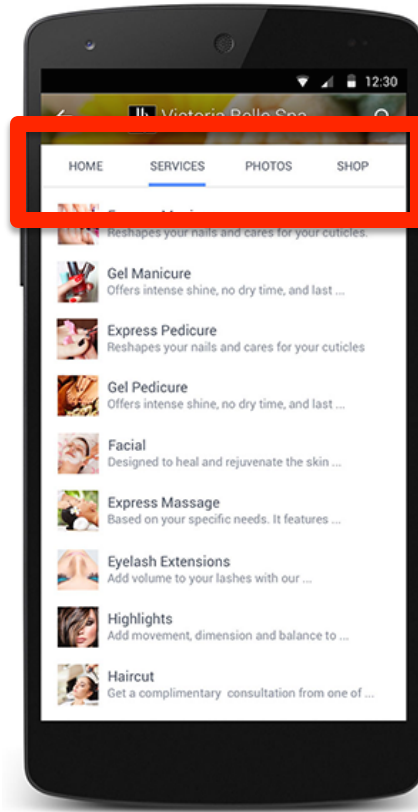
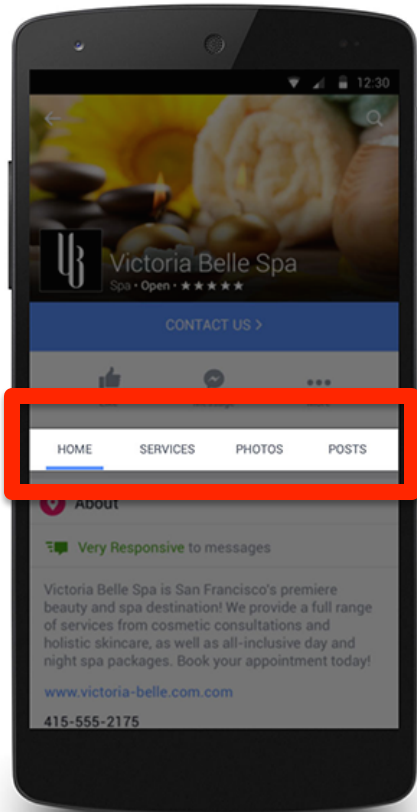


Source: BIA/Kelsey Local Commerce Monitor™ (LCM) Wave 18, Q3/2014 (and prior waves, if relevant). Methodology: Online panels.

S11 Check all media used for advertising and promotion of your business

Sample Size = 546

Example: Facebook Pages Expanding Functionality



Agenda

- Mobile & Local: By the Numbers
- Local: It's all about *Calls to Action*
- Local: It's all About *Social*
- **Local: It's all About *Content Marketing***
- How Does Vision Care Stack Up?

The Fastest Growing Local Content Marketing Tool is ...



Instagram

Case Study: Genghis Grille



julianneed

Follow

5 months ago

Lunch today with Victor at genghis grill! #genghisgrill #lunch #boyfriend #vegan #vegetarian #foodshare #veganfoodshare #yum #veggies #rice #tofu

♥ leaflibrary, lyza_f, jaebok_ and 19 others like this.



crissyshadows

Yummy!



genghisgrill

@julianneed looks great! Very fresh and healthy!



julianneed

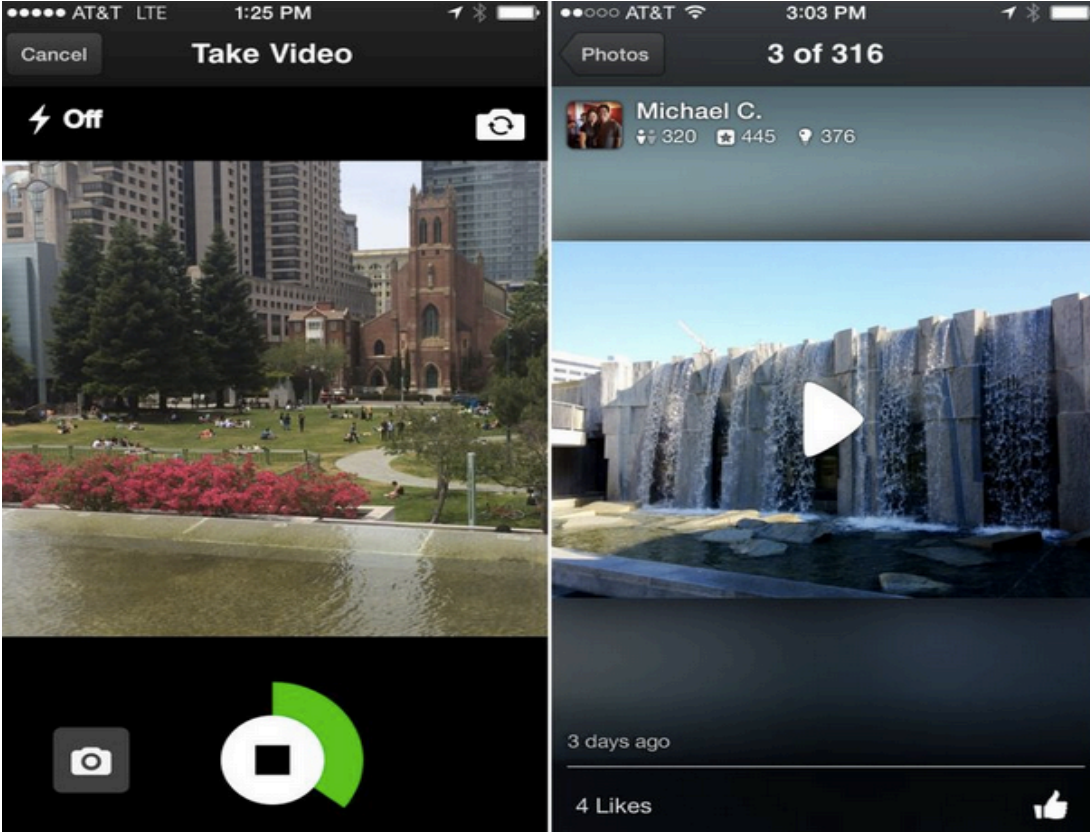
@genghisgrill it tasted great too!)



Leave a comment...



The Next Step: Local Business Video



Channels to Consider



Agenda

- Mobile & Local: By the Numbers
- Local: It's all about *Calls to Action*
- Local: It's all About *Social*
- Local: It's all About *Content Marketing*
- **How Does Vision Care Stack Up?**



DIGITAL PRESENCE ... OF ... US OPTOMETRISTS

Online presence makes a huge difference in the way sales are made today. Top Optometric Chains have been known to do better business because of their digital footprint while independent optometric stores are losing ground because they lack digital visibility.

PRIMARY SOURCE:

BuzzBoard

OTHER SOURCE:

<http://www.ibisworld.com/search/default.aspx?st=optometrists>

<http://www.holdenmoss.com/wp-content/uploads/2014/06/Holden-Moss-Optometrist-Industry-Rpt2014.pdf>

<http://searchenginewatch.com/sew/study/2343577/google-local-searches-lead-50-of-mobile-users-to-visit-stores-study>

<http://www.visionmonday.com/vm-reports/top-50-retailers/article/key-optical-players-ranked-by-us-sales-in-2014/>

<http://www.statista.com/statistics/256799/percentage-of-eyewear-sold-online-in-the-us-by-type/>

<http://www.statista.com/statistics/273991/share-of-adult-us-internet-users-who-use-digital-coupons/>



In 2014



\$15B

U.S. Annual
Optometrists Revenue



33,013

Number of Optometric
Businesses in the U.S.



5%

Projected Revenue
Growth Rate between
2014 and 2018



\$12B

Revenue of Eyeglasses
and Contact Lens Stores
in the U.S



7497

Businesses Selling
Eyeglasses and
Contact Lens



\$344M

Online Eyeglasses and
Contact Lens Sales
in the US



324

Online Businesses Selling
Eyeglasses and
Contact Lens

Revenues of Top 5 Optometrist Chains in the US in 2014

Luxottica
Retail

\$2.31
Billion

Vision Source,
LP

\$2.21
Billion

Wal-Mart
Stores, Inc.

\$1.52
Billion

National
Vision, Inc.

\$890
Million

Visionworks
of America, Inc.

\$880.1
Million

BuzzBoard Analysis of Optometrist Websites

Total no. of Optometrists with Online Presence: **9850**

Online Ordering

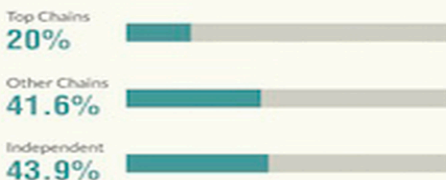
No Online Ordering Ability



Big chains as well as independent optometrists are not using e-commerce facilities to tap online consumers.

Mobile Presence

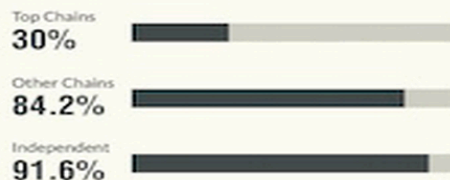
No Mobile-friendly Website



While the top chains have a significant mobile presence, a considerable portion of other chains and independent optometrists are missing a mobile presence.

Search Engine Marketing

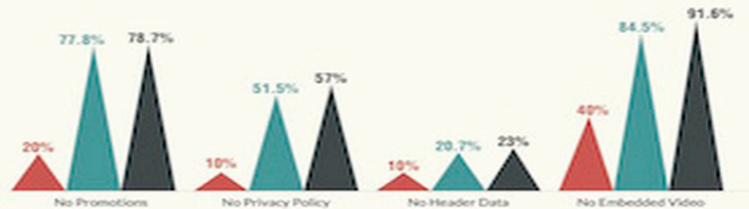
No Google Adwords Presence



Advertising via search engines help generate leads and enhance sales. Some top chains are leveraging PPC ads, but a large percentage of independent as well as other chains are not doing that.

Website Robustness

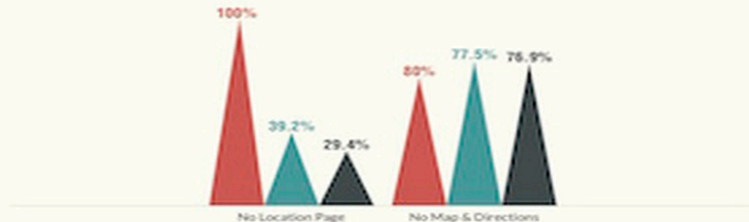
● Top Chains ● Other Chains ● Independent



A large percentage of the independent optometrists and other chains are behind the top chains when it comes to adherence to online standards and practices. These important website elements help in leveraging SEM while increasing the consumer engagement and boosting SEO value.

Location Presence

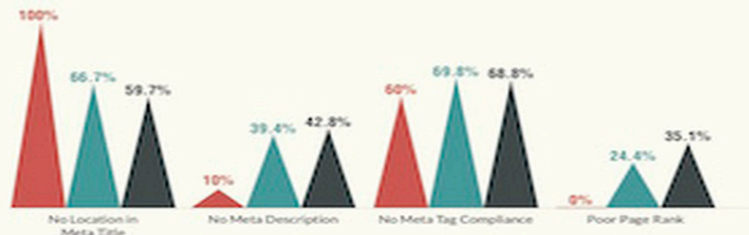
● Top Chains ● Other Chains ● Independent



Most chains and independent optometrists lack location information, including maps and directions to their stores on their website which hampers physical sales to some extent.

Website Discoverability

● Top Chains ● Other Chains ● Independent



A large percentage of online optometrists lack key features that drive SEO performance. This results in diminished visibility in search results and low click-through rates.

Social Media Presence

● Top Chains ● Other Chains ● Independent



Independent optometrists as well as the chains are not leveraging the power of social media to promote their businesses or to engage with consumers on a one-on-one level.

Why Does Digital Presence Make A Difference?

In order to compete with national optometric chains, independent and local optometrists need to adopt a digital-first approach.

Local Search



50%
mobile users



34%
desktop/tablet users

} More likely to visit a store within a day of their local search

For visibility in search engine results, local Optometrists need a website with relevant SEO keywords. A mobile-friendly website ranks higher in search results on mobile devices.

E-Commerce



16.7%
for contact lens



2.9%
for Rx eyeglasses

} Online Transactions

An e-commerce site adds a new channel for local optometrists, helping gain revenue.

Digital Coupon



55%
adult internet users

} Digital Coupon Redeemed

Online interactions with customers on discounts and coupons help tap the digital-savvy consumer base.

Thanks

Mike Boland

mboland@biakelsey.com

@mikeboland