



The Next Era of Local Search

Video Insight Briefing Series



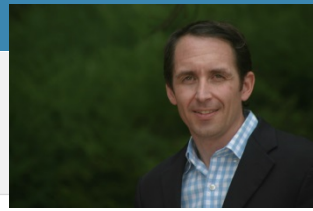
Q1 2016

Mike Boland

Chief Analyst & VP, Content

BIA/Kelsey

Introduction



BIA/Kelsey *Video Insight Briefing*: What is It?

- To complement our written reports, we are rolling out a new intelligence resource called the **BIA/Kelsey Video Insight Briefing Series**.
- These are a series of briefings BIA/Kelsey analysts will be completing quarterly on “tentpole” topical areas that are receiving the most investment, innovation, opportunity and curiosity. We will also cover topics as client demand dictates.
- ***What can you expect in a Video Insight Briefing?*** Presented in slide deck format, the briefing includes a video discussion of the presentation along with key links to multimedia assets about the topic. Our goal is to use a briefing on a particular subject to deliver meaningful insights and analysis via video you can watch at your convenience. This format also aggregates all our content by topic so it's easy for you to find and access. We will be available to discuss the briefing after you've consumed it as your convenience. We are also available for customized briefings.
- This particular client briefing zeroes in on the *Next Era of Local Search*. How is search transforming in the smartphone era? How is the movement towards apps affecting traditional browser-based search (a la Google)? And what does it mean for media companies and tech startups in the local space? This presentation unpacks the key drivers, variables and analyst insight.

Agenda



1. Video presentation - slides w/ voiceover

2. Additional drill-down resources

3. Presentation: *The Next Era of Search*

- Battleground 1: the mobile web
- Battleground 2: deep linking
- Battleground 3: Google Now

Video Presentation



CLICK TO WATCH

(Clicking opens a private web page on our YouTube channel.)



Mike Boland: The Next Era of Search

A video player interface with a background of a grid of colorful mobile application icons. The player has a play button in the center, a clock icon in the top right, and a share icon in the top right. The title 'Mike Boland: The Next Era of Search' is at the top left.

Mike Boland | Chief Analyst & VP | BIA/Kelsey

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Next Era of Search Insight Paper



CLICK TO READ



The cover of an insight paper. At the top right, the text 'Insight Paper' is written in a brown, italicized font. Below this is a large orange rectangular area containing the title 'Mobile Local Discovery: The Next Era of Search' in white, bold, sans-serif font. Underneath the title, the date 'September 2015' is written in a smaller white font. At the bottom center of the orange area is an illustration of an open brown door with a magnifying glass icon positioned over it, symbolizing discovery or search.



Analyst Brief: Deep Linking

Five minutes on deep linking.

CLICK TO WATCH

(Clicking opens a private web page on our YouTube channel.)



Mike Boland: Analyst Brief, Deep Links

Mike Boland | Chief Analyst & VP | BIA/Kelsey

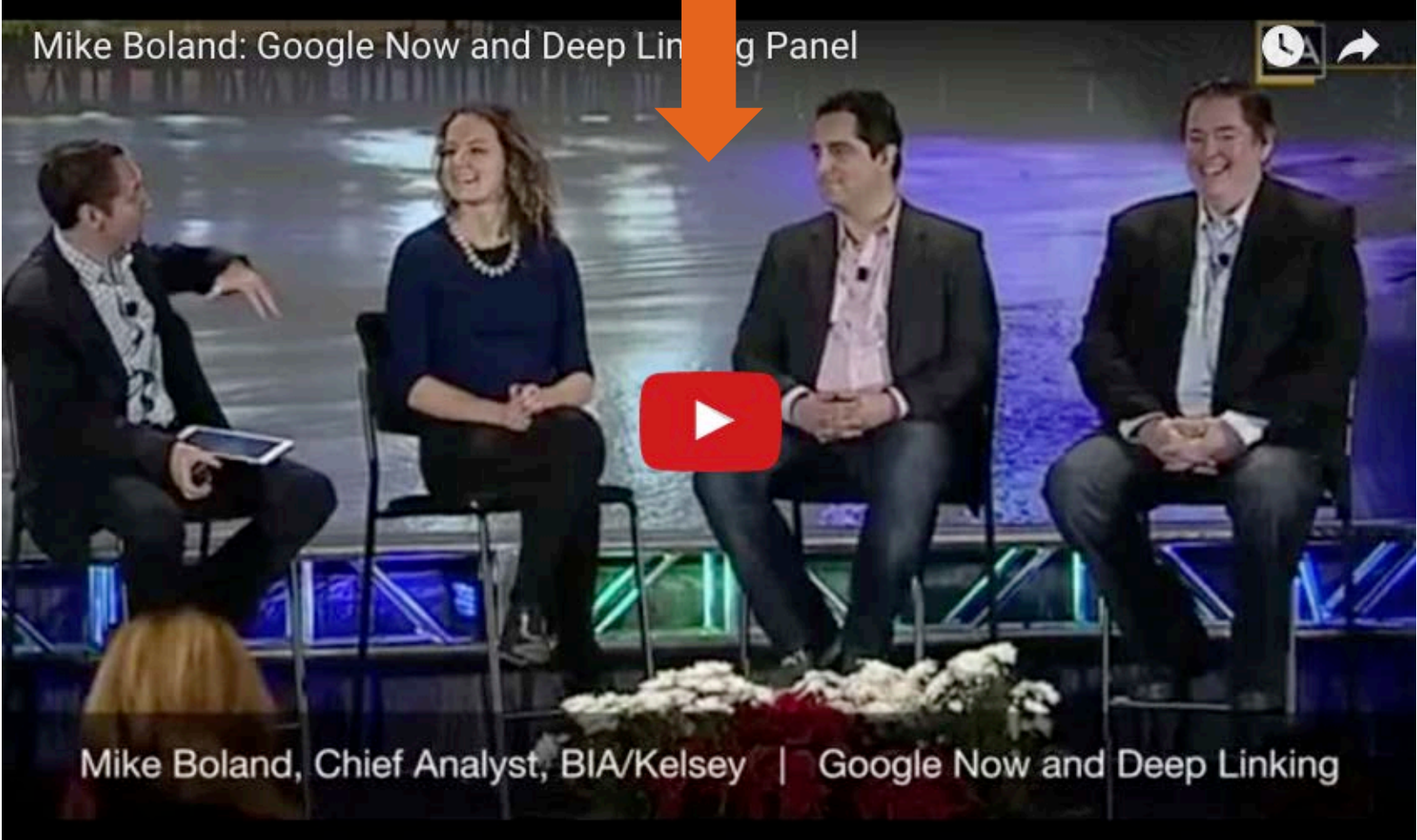


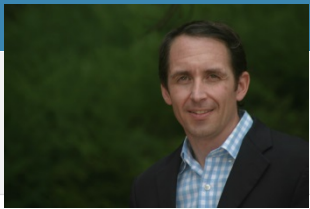
Conference Panel: Google Now and Deep Linking

Google & Button discuss their strategies.

CLICK TO WATCH

(Clicking opens a private web page on our YouTube channel.)

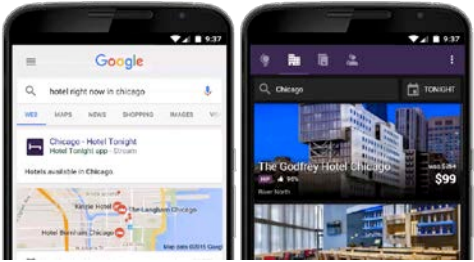




Further Reading: BIA/Kelsey Articles

Deeper analysis and analyst coverage of the topics covered in this presentation

Google Fights Fire with Fire: The Implications of Streaming Apps Within Search



Should Google Revisit a Standalone Local Discovery App?



The New Era of Search Has Tipped



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Mobile Local Discovery

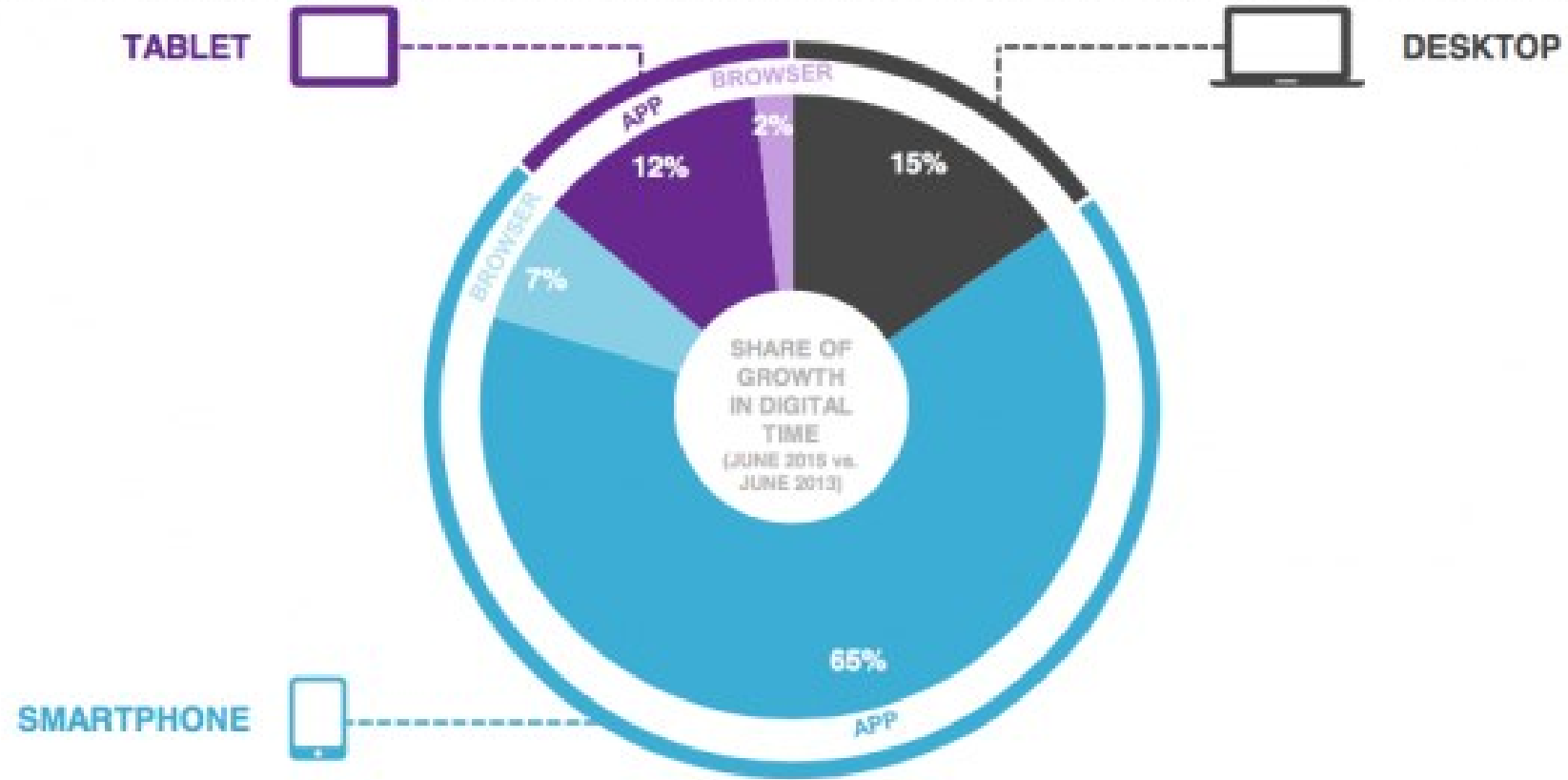
The Next Era of Search



Mobile Usage is Migrating Towards Apps... In a Big Way



Share of Growth in Total Digital Time Spent: June 2015 vs. June 2013
Source: comScore Media Metrix Multi-Platform & Mobile Metrix, U.S., Total Audience





So What Does That Mean?

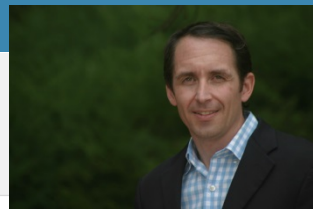
The next era of search will be
fought on Three *Battlegrounds*

Battleground #1

Improving The Mobile Web



The Mobile Web is a Sub-Optimal User Experience



This Has Prompted Google to Force Good Behavior



Mobile Optimized is the New Black



Awesome! This page is mobile-friendly.

How Googlebot sees this page

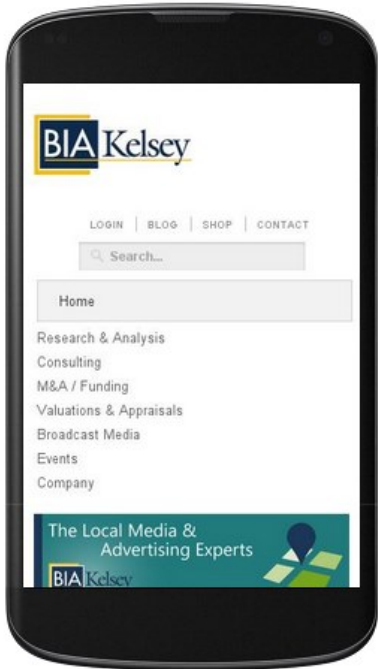
This page uses one resource which is blocked by robots.txt. The results and screenshot may be incorrect.

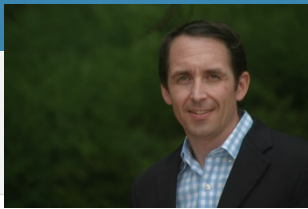
Does this screenshot look incorrect? [Learn how to let Googlebot view the page correctly.](#)

[▶ Show resources](#)

Learn more about mobile-friendly pages

If you're interested in learning more about mobile sites, check out our [Webmaster's Mobile Guide](#) or the [Principles of Site Design](#) on Web Fundamentals.

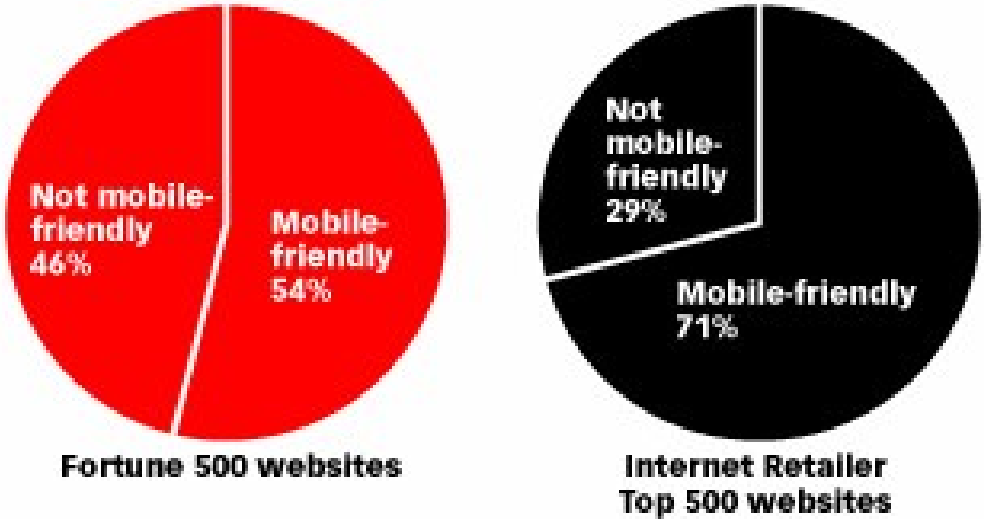




But After All That.... Still a Ways to Go

If the Fortune 500 is so far behind mobile optimization, where does that put *local businesses*??

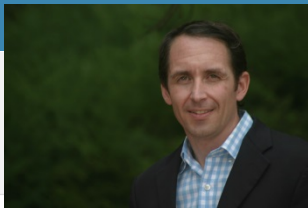
Share of Fortune 500 and Internet Retailer Top 500 Websites that Are Mobile-Friendly*, April 2015
% of total



Note: *based on Google's mobile-friendly requirements as of April 2015
Source: Merkle RKG, "Digital Marketing Report Q1 2015," April 21, 2015

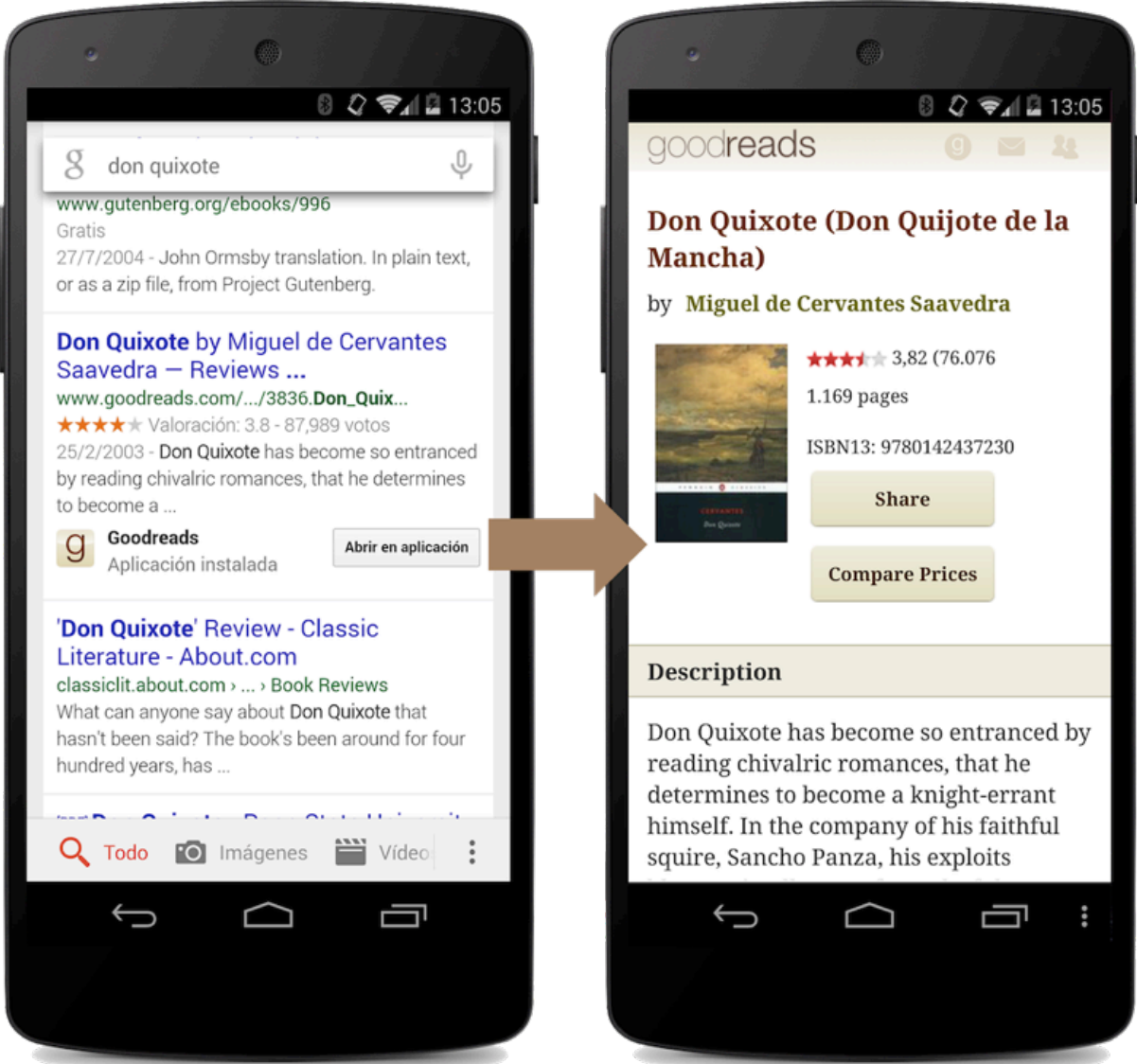
Battleground #2: Deep Linking

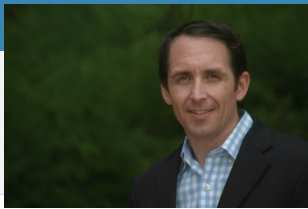




Deep Linking: What is It?

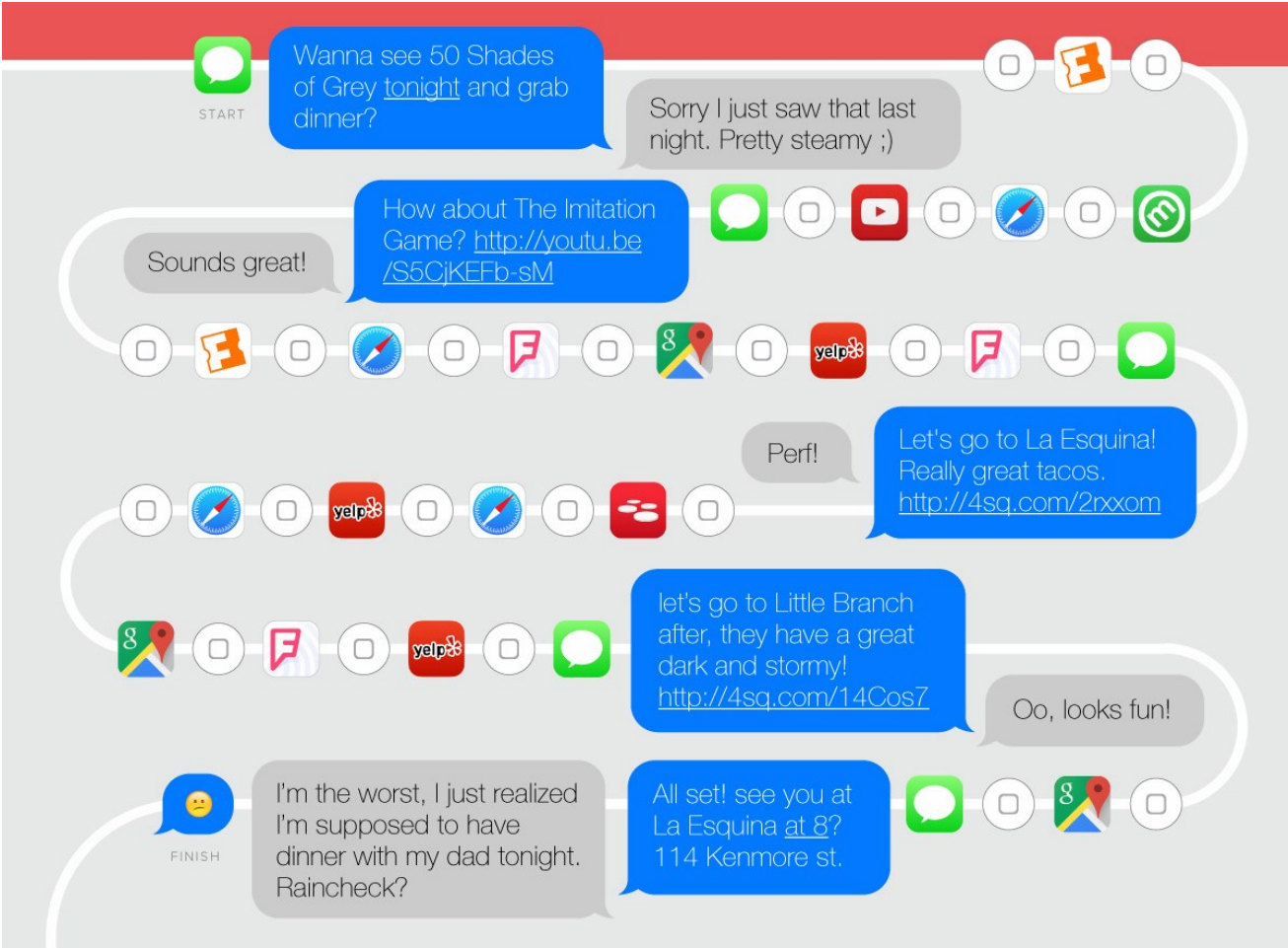
Making apps as indexed, searchable, and interlinked as the web



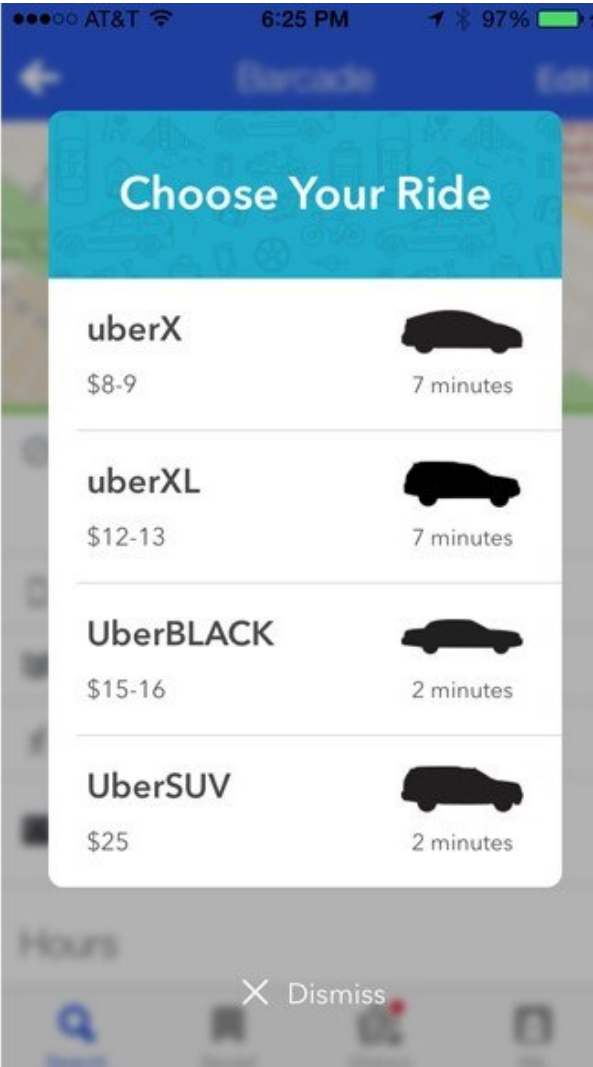
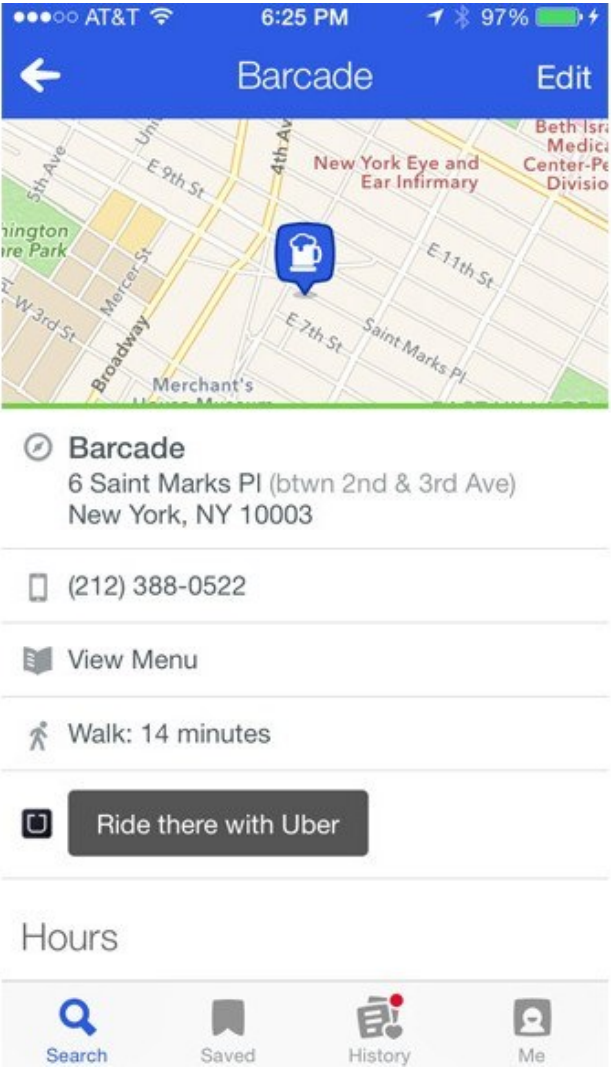
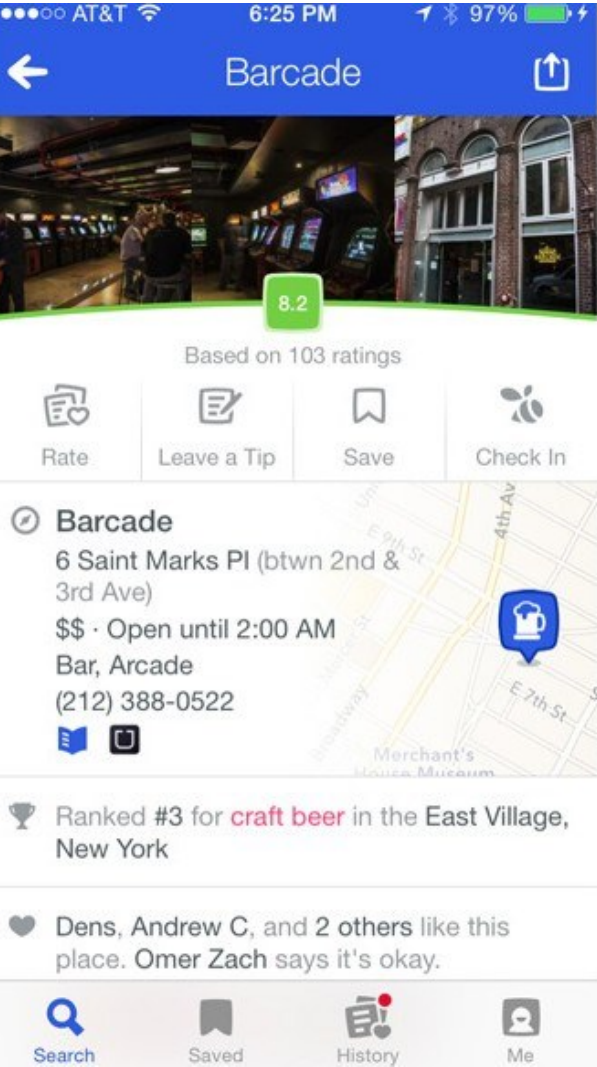


It's Even More Important in Local

The immediacy and local intent of mobile makes deep linking -- as opposed to manually tapping in and out of apps -- all the more needed.

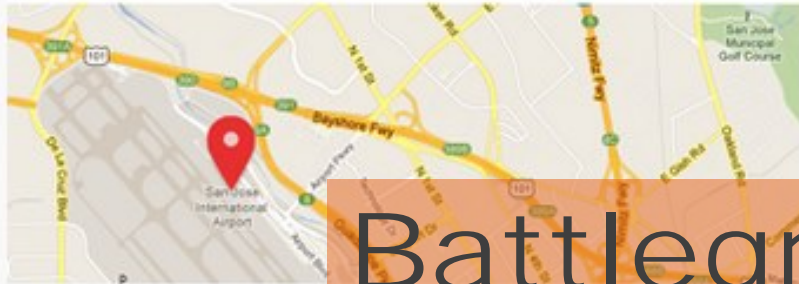


Deep Linking Example: Foursquare and Uber



Lunch with Brad @ 12pm

2368 3rd Street, San Jose, CA 94107



Get directions / 33min via 101

Alternate route / 45min via 280

San Francisco



SUNNY

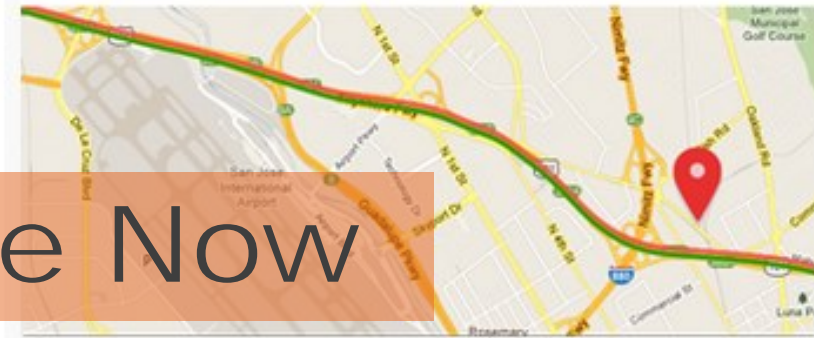
3MPH

80°

TUE	WED	THU	FRI
72°	82°	60°	84°
62°	72°	42°	78°

55 minutes to work

Light traffic on 101



Battleground #3: Google Now

Pacifica Airlines
flight 2340



Status: Delayed / Wed, June 27, 2012

Depart San Francisco

SFO 7:09pm (sched. 5:20pm)
Terminal 4, Gate A3

Arrive Taipei

TPE 10:32pm
Terminal 2, Gate 50

The Connaught Hotel

Carlos Place, Mayfair, London
W1K 2AL, United Kingdom

Check-out in 1 hour



La Gavroche

43 Upper Brook Street, London, W1K 7QR

Reservation in 1 hour
Journey time walking 45 minutes



Get directions



Google Now: What is It

Google's predictive engine to push you information based on your current and location-based needs

Google Now's success or failure will determine Google's fate in an increasingly mobile world

Lunch with Brad @ 12pm
2368 3rd Street, San Jose, CA 94107

[Get directions / 33min](#) via 101

[Alternate route / 45min](#) via 280

San Francisco

80°

SUNNY
3MPH

TUE	WED	THU	FRI
72° 62°	82° 72°	60° 42°	84° 78°

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[Navigate to SFO / 34 min](#)

The Connaught Hotel

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Check-out in 1 hour

[Get directions](#)

La Gavroche

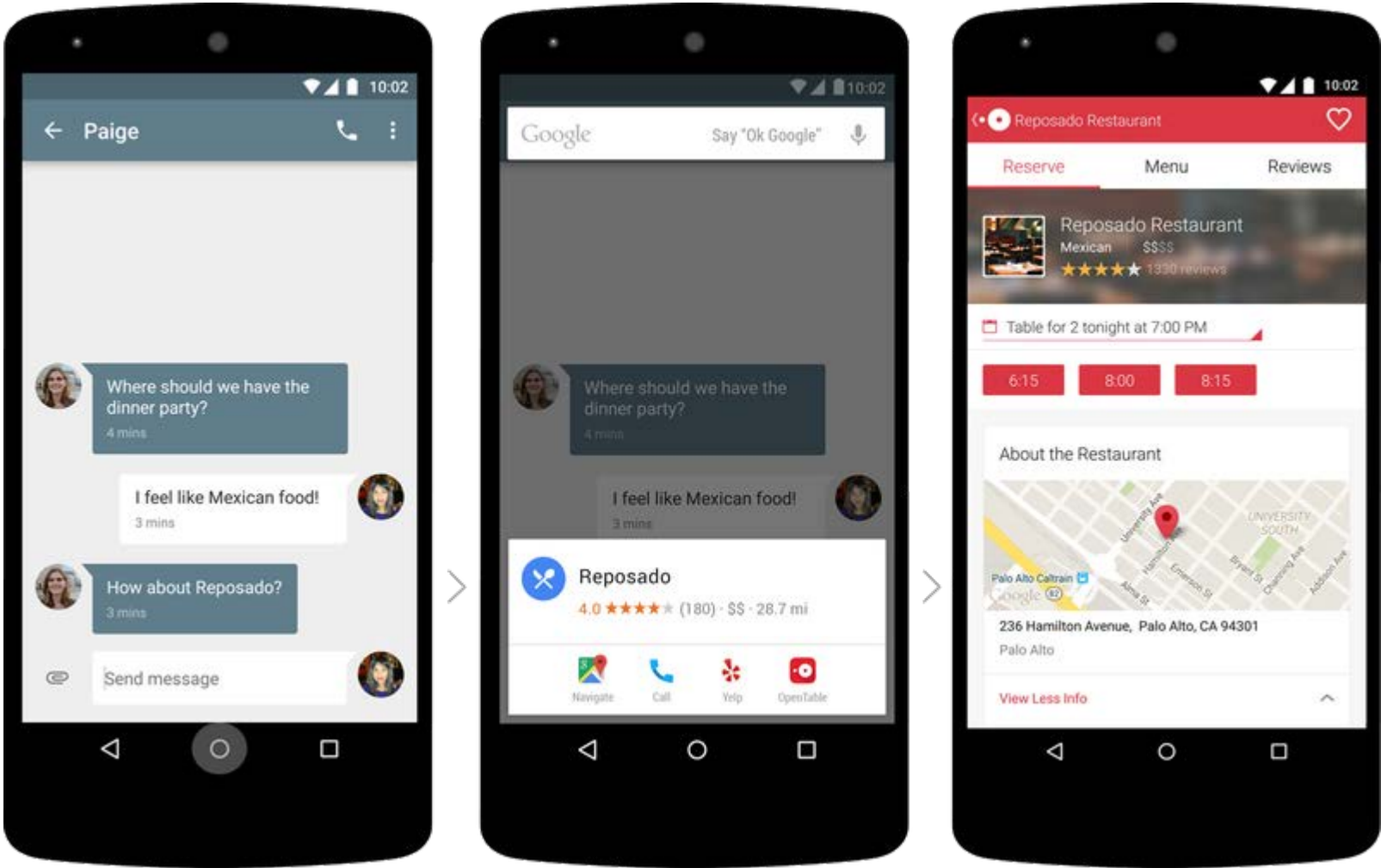
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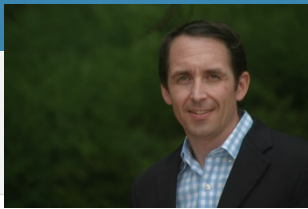
Reservation in 1 hour
Journey time walking 45 minutes

[Get directions](#)

[View email](#)

Tapping Third Party Apps: Google *Now on Tap*





The Central Philosophy: *Micro-Moments*

If Google can effectively push useful information during the hundreds of daily Micro-moments, it can more than make up for the loss of monetizable search queries brought by the smartphone age.

Micro-Moments

Want-to-know moments. Want-to-go moments. Want-to-do moments.
Want-to-buy moments. They're all micro-moments, and they're the new battleground for brands.



Questions & Comments:

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