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**Hot Advertising and Social Trends for**  
**SMB Advertisers**

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Directional Media Strategies 2011

**The Summit for Small-Business**  
**Advertising Solutions**

**Sept. 20-22, 2011**

Sheraton Denver Downtown Hotel • Denver, Colorado

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## **A Look at DMS '11**

**Peter Krasilovsky**

VP & Program Director

Marketplaces

BIA/Kelsey

# Agenda

- A Look at DMS '11
- 5 Key SMB Advertising Trends
- Drilling Down Into SMBs and Social Media
- Questions & Answers



## **The Summit for Small-Business Advertising Solutions**

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*Plan to attend:*



*The Summit for Small-Business Advertising Solutions*

# DMS '11: An Evolving Focus

- Focus on understanding how SMB advertising behavior is changing and examining the solutions emerging to address these changes
- Key topics at DMS '11
  - Performance-based advertising
  - Mobile local ad networks
  - New sales models
  - Self-service solutions
  - Content creation for SMBs
  - Social local media
  - Evolution of traditional media/SMB relationship

# DMS '11: Thought Leaders

**Bill Dinan**, President, Telmetrics

**Rita Fabi**, Head of Market Solutions,  
Global Customer Marketing and  
Communications, Facebook

**Clare Hart**, CEO, Infogroup

**Tom Higley**, CEO, Local Matters

**Nir Lempert**, CEO, Golden Pages

**Ben Smith**, Founder, MerchantCircle

**Joe Walsh**, President and CEO,  
Yellowbook

**Jeff Beard**, President and GM, Localeze

**Mike Centorani**, VP of Sales Training,  
MatchCraft

**Dan Gilmartin**, VP Marketing, Where

**Craig Hagopian**, CMO, xAd

**Greg Hallinan**, CMO, Verve Wireless

**Warren Kay**, CEO, iPromote

**Brendan King**, CEO, VendAsta

**Paul Levine**, COO, Trulia

**David Lifson**, CEO, Postling

**Neg Norton**, President, Local Search  
Association

**David Read**, Director of Sales, Pay for  
Performance, AT&T Advertising Solutions

**Justin Sanger**, Founder and CEO, JoinHere

**Daniel Shaked**, CEO, No Problem

**Darby Sieben**, Director, Business  
Development, Yellow Pages Group

**Andy Steuer**, CEO, MerchEngines

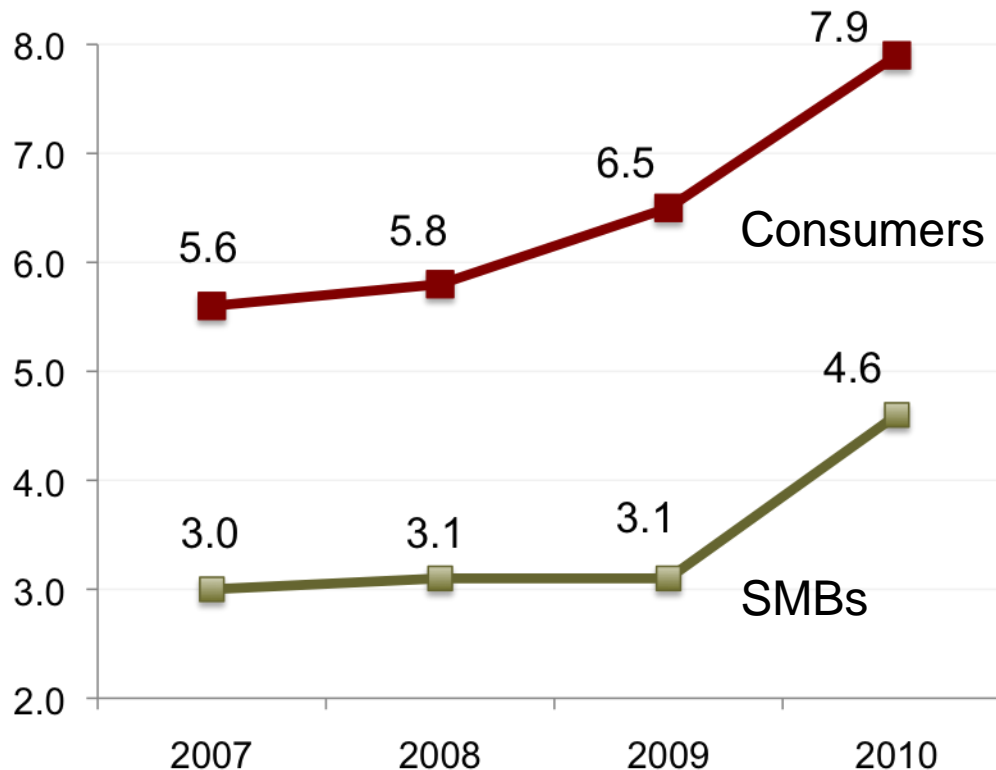


## **5 Key SMB Advertising Trends**

**Charles Laughlin**  
SVP & Program Director  
The Kelsey Report  
BIA/Kelsey

# #1. SMBs Lag Consumers in Media Use

Average Number of Media Used by SMBs and Consumers\*



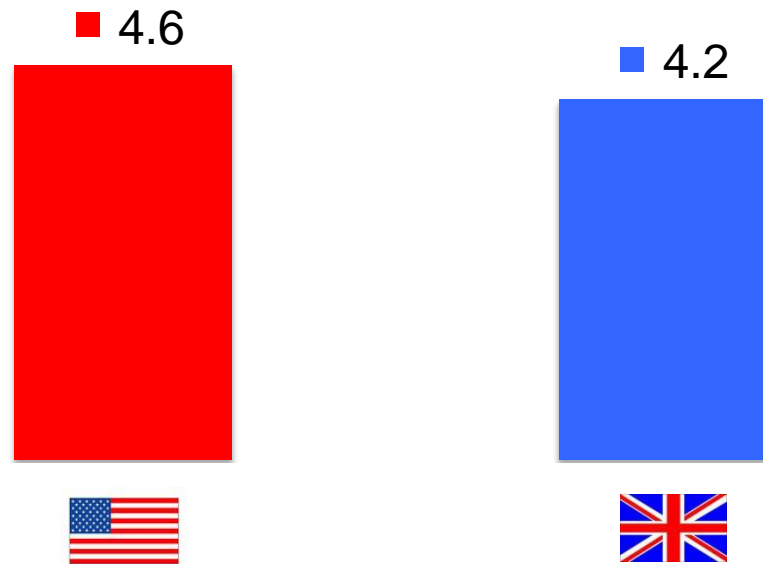
\*Number of different media used by consumers when shopping for local products or services.

Note: Each survey wave typically identifies a larger number of media to choose from, so there is some “longer menu” effect captured in these data.

Sources: BIA/Kelsey Local Commerce Monitor and User View surveys.  
Methodology: Online. Cosponsor: ConStat.

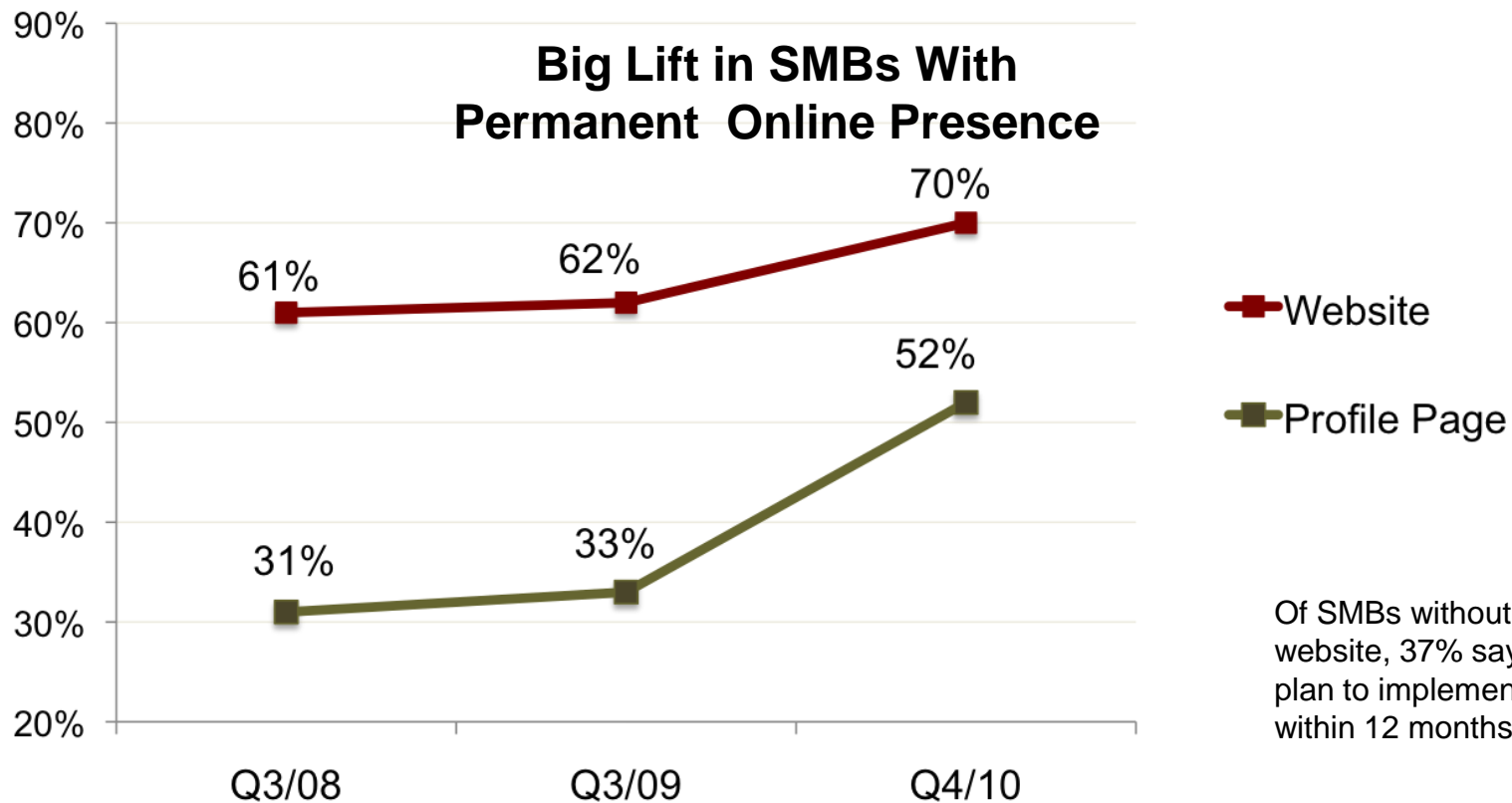
# U.K., U.S. SMB Media Usage Similar

SMBs in the United States use more media than SMBs in the United Kingdom — but only fractionally more.



Sources: BIA/Kelsey Local Commerce Monitor surveys. Methodology: Online. Cosponsor: ConStat.

# #2. Web Presence Is the New Listing

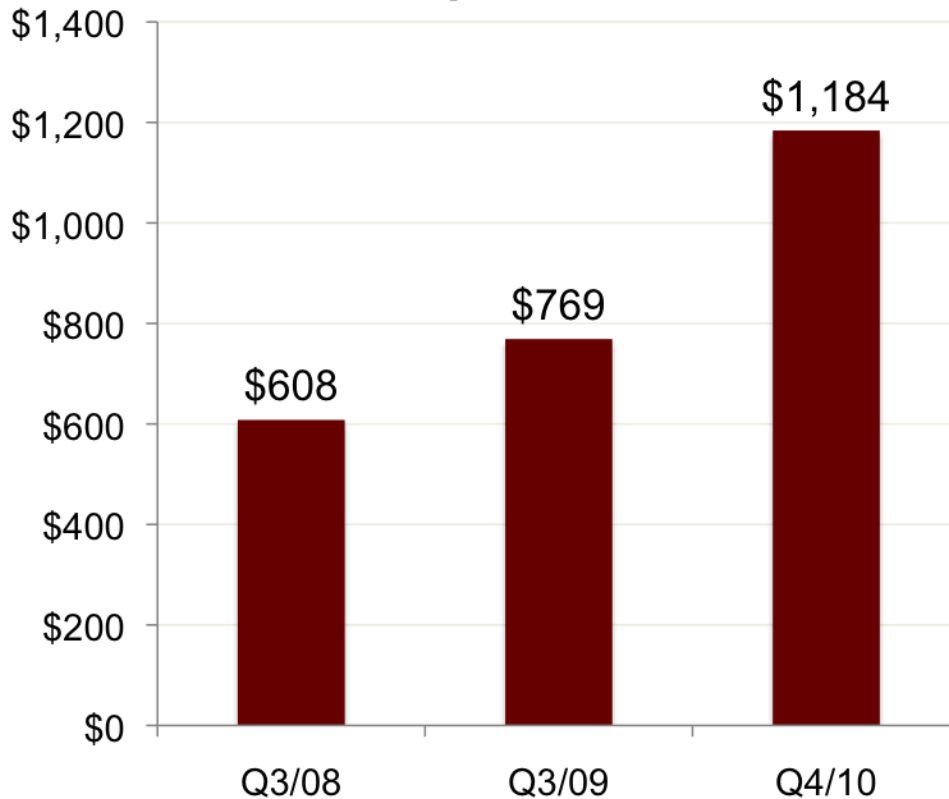


Of SMBs without a website, 37% say they plan to implement one within 12 months.

Sources: BIA/Kelsey Local Commerce Monitor surveys.  
Methodology: Online. Cosponsor: ConStat.

# Spend on Web Presence Has Increased Dramatically

## Annual Spend on Website\*



Average annual spending on an SMB's website\* jumped 54%.

\*Also includes spending on related entities, such as home page, business profile pages, landing pages. No marketing, SEM, SEO or similar expenses are included, although the costs of services associated with the website itself (e.g., traffic analytics) probably are.

Sources: BIA/Kelsey surveys

# #3 Mobile Is Driving Call-Based Models

- Smartphones will make up 30% of all mobile phones in 2011.
- By 2020, 10 billion mobile devices are expected to be in the market, 10 times the number of PCs today.
- Call advertising has the potential to connect hundreds of millions of consumers directly to businesses through digitally driven phone calls.

## Technology Innovations Change Consumer Behavior

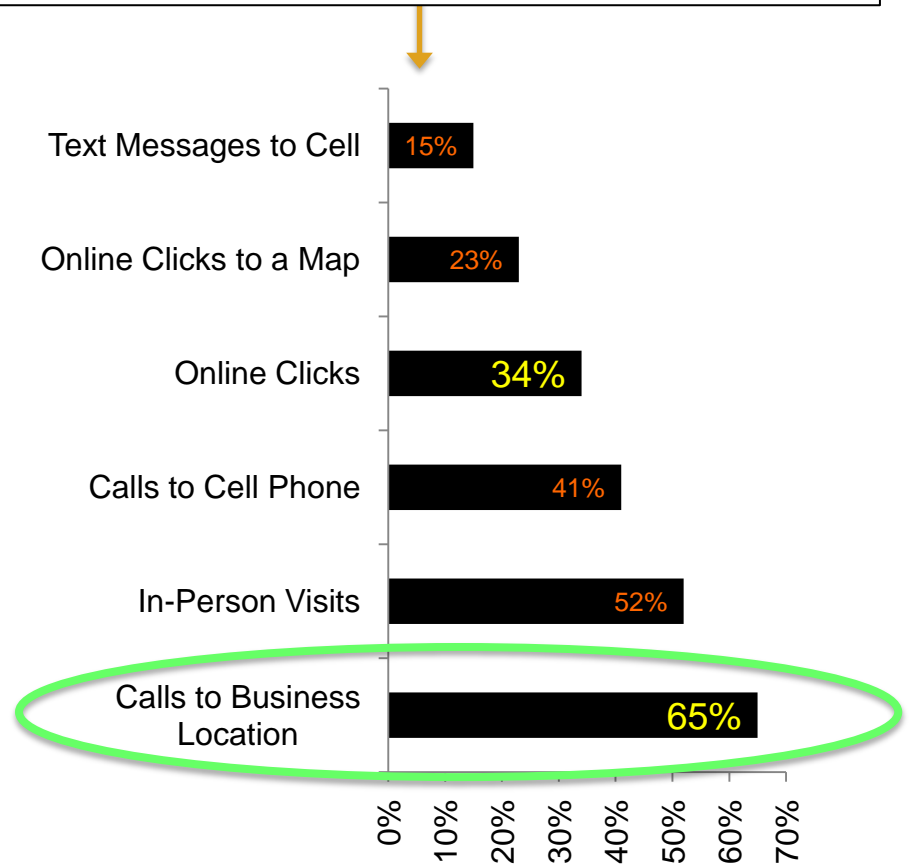
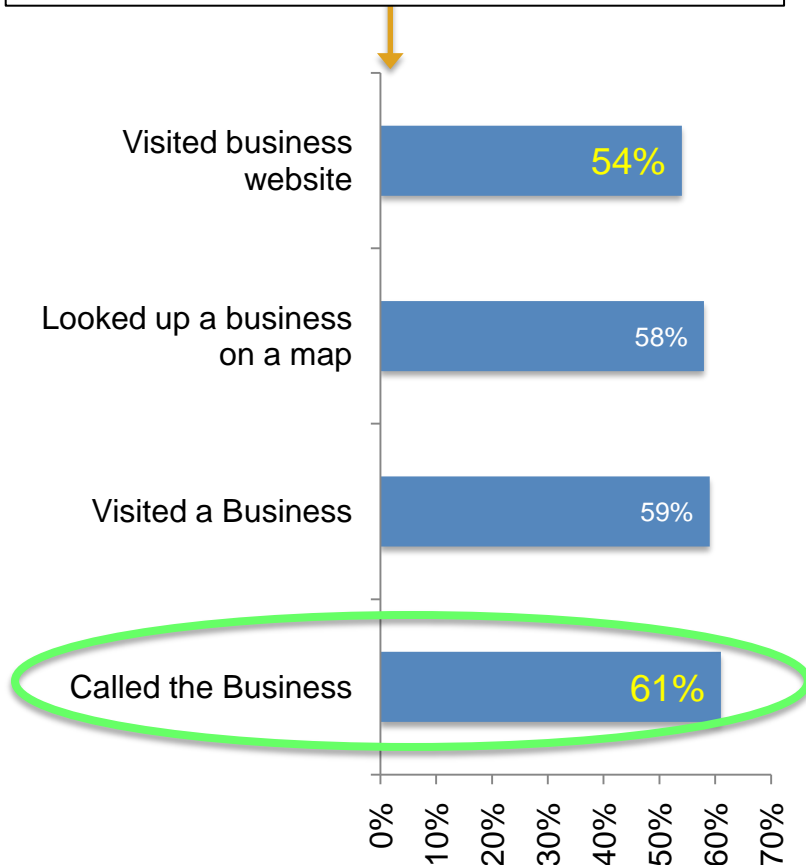


# Consumers Make Calls

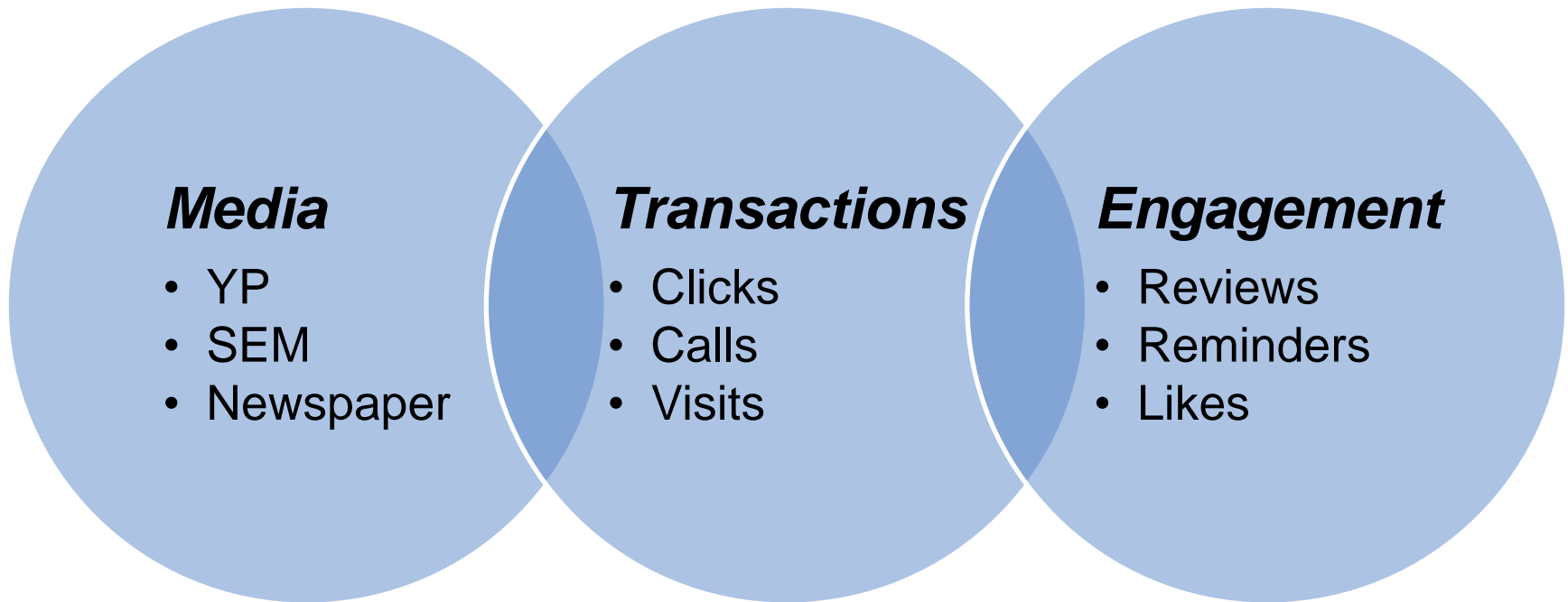
95% of smart phone users have looked up local information

The action those users took

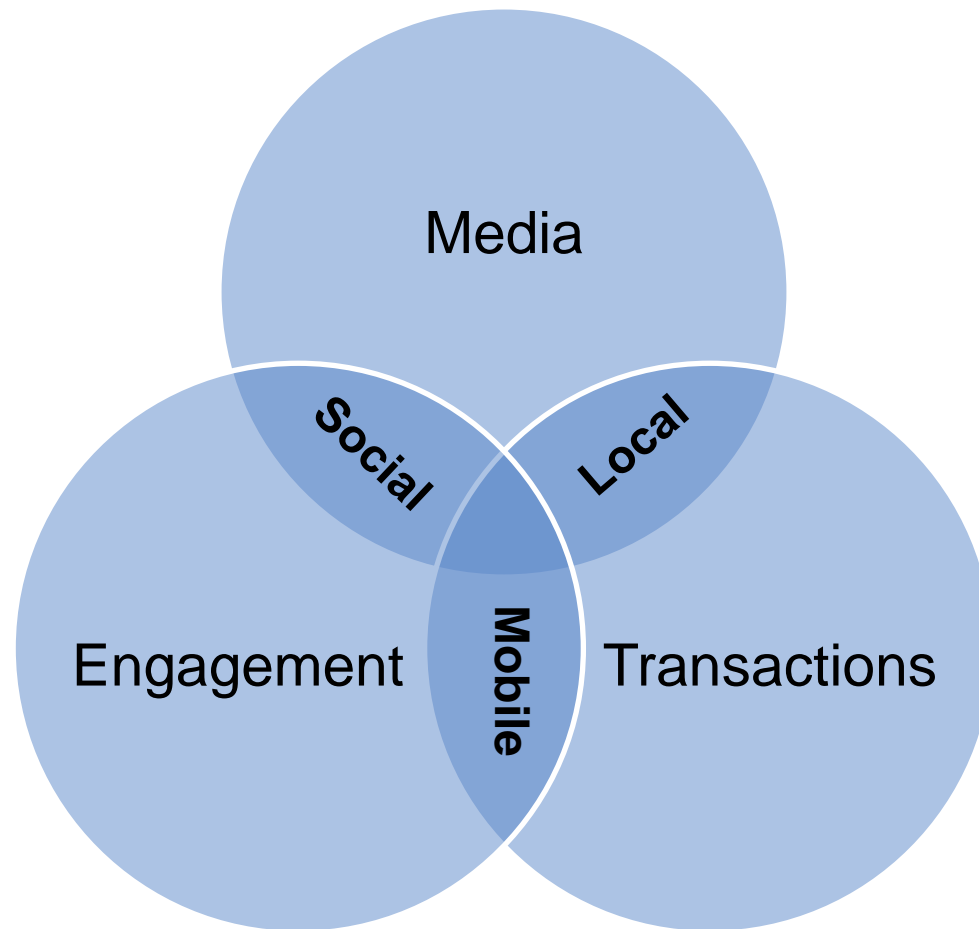
The action businesses most value



# #4. The SMB Value Chain Is Evolving ...



# All of This Is Merging



# Media — Analog and Digital Presence

## Media

- Signage
- Listings
- Print
- Banners
- SEO
- DOOH
- Door hangers
- Radio
- Cable TV
- Mobile TV



**WPGC Banner Ad Sizes**

For the first time, internet has surpassed TV as the primary advertising medium for the average adult's media diet. The top four markets for internet usage are San Jose, San Francisco, Washington, DC and Austin. (source: The Media Audit January 2008)

Online ad spending is expected to triple in the next five years! (source: Washington Business Journal November 2007)

Commercial recall quadruples from 6 to 27% when you use radio AND the internet together. (RACI, Feb/07)

The weekly internet radio streaming audience has increased 5% over the past year!

**WPGC 95.5 Listeners are Internet Savvy!**

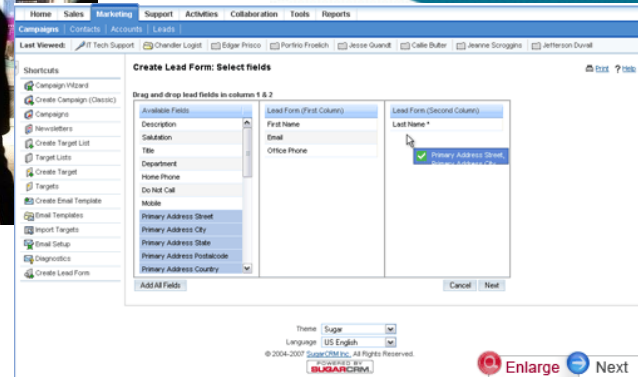
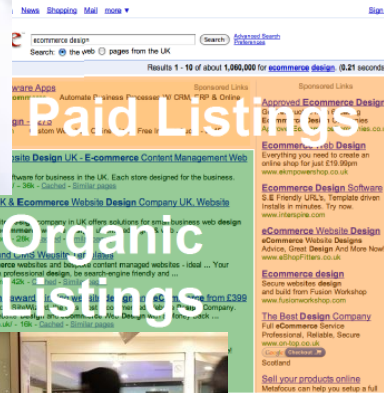
- We have over 1,200,000 page view impressions per month on wpgc.com!
- We have over 200,000 LOYAL LISTENERS streaming www.wpgc.com each month!



# Transactions — Converting to Customers

## Transactions

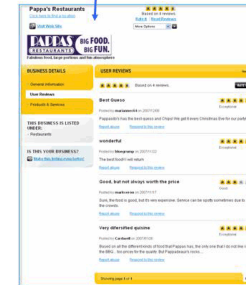
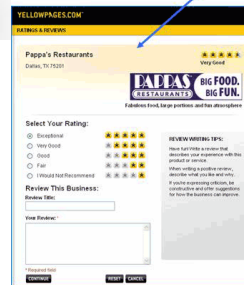
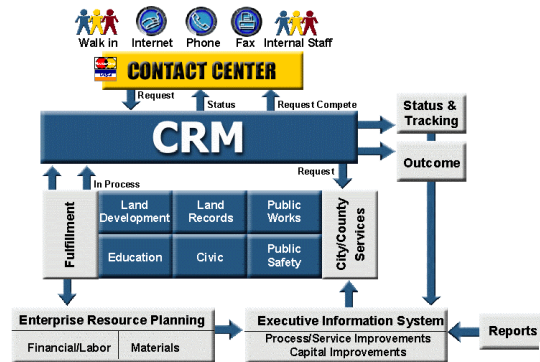
- Clicks
- Calls
- Forms
- Store visits
- Inquiries
- Social - acquisition



# Engage, Maintain and Retain

## Engagement

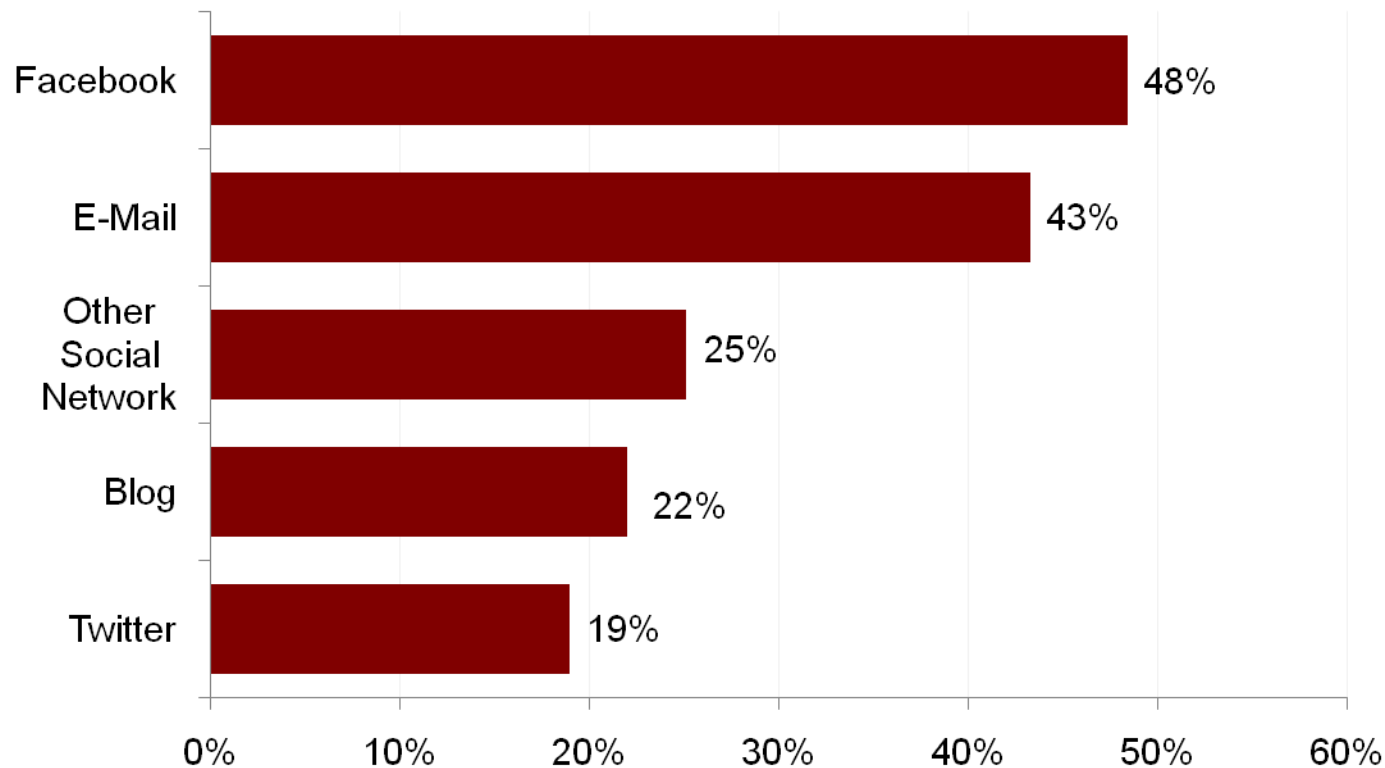
- Ratings & reviews
- Online booking
- Customer reminders & updates
- Social - retention
- Retention strategies
- Telephone training
- POS



# #5. SMBs Embracing Social Media

SMB usage of various “social media” is already intense. Nearly half of SMBs reported having a Facebook page for their business — even more than use email marketing.

### Use of Social Media



Source: BIA/Kelsey LCM Survey, Wave 14



## **Drilldown on Social Media**

**Jed Williams**

Analyst & Program Director

Social Local Media

BIA/Kelsey

# The Social Business Opportunity



# DMS '11 Social SuperForum

- **Featured Address:** Rita Fabi, Head of Market Solutions, Global Customer Marketing and Communications, Facebook
- **Part II: Social Marketing Agencies**
  - David Lifson, CEO, Postling
  - Mike Nabasny, Sales Manager, Wildfire
- **Part III: Social CRM and Reputation Management**
  - Brendan King, CEO, VendAsta
  - Justin Sanger, Founder and CEO, JoinHere
- **Part IV: Social Advertising Case Studies**
  - How small-business advertisers have mastered the art of turning fans and friends into paying customers

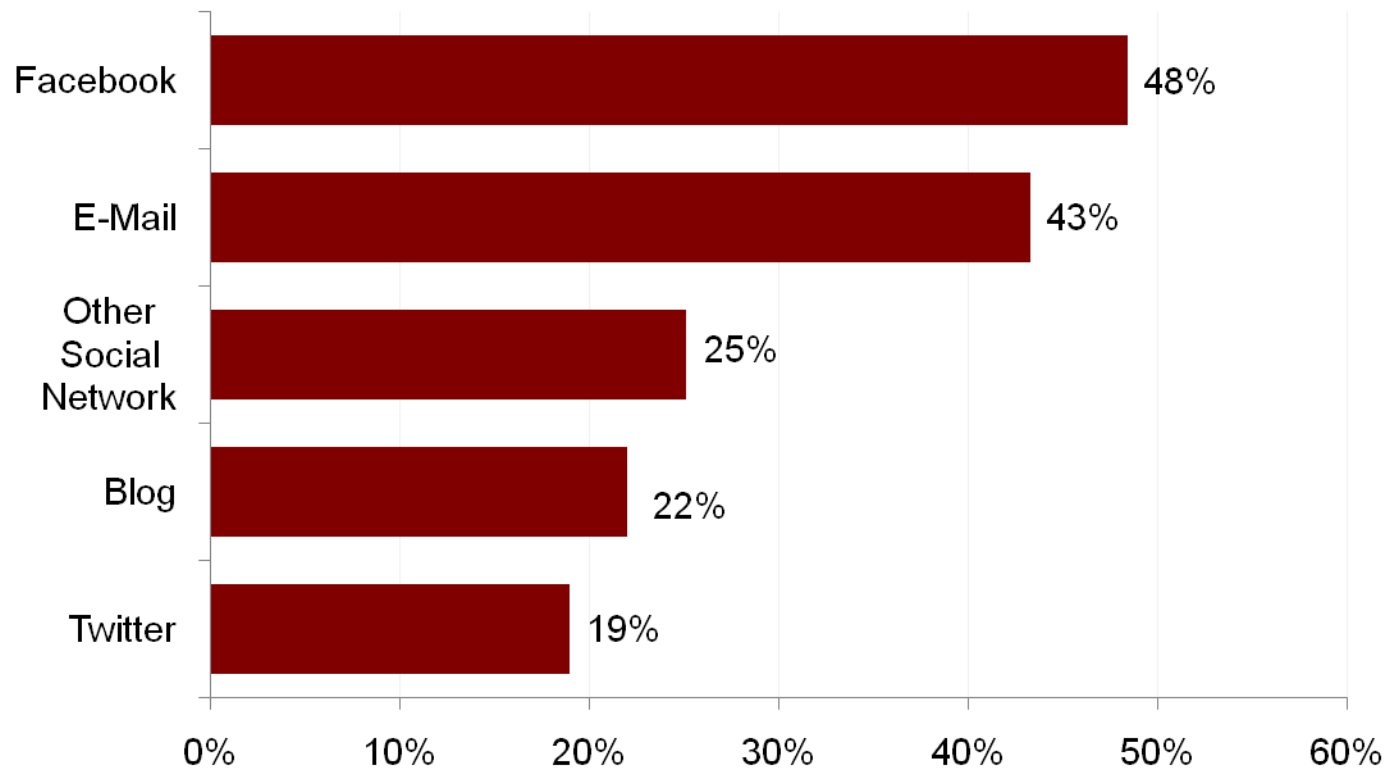
# What the Data Tell Us ...



# SMB Use of Social Media Is Widespread

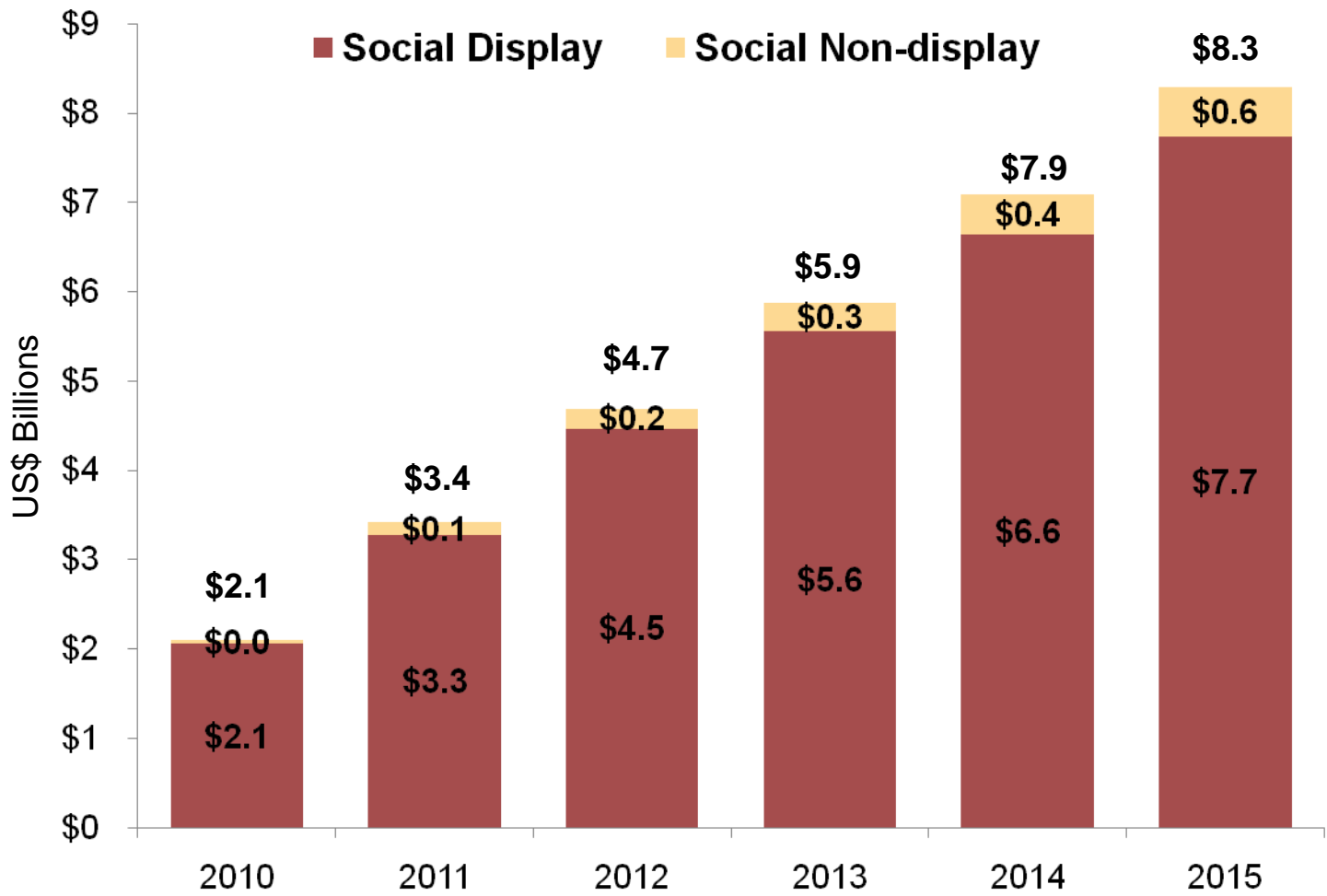
SMB usage of various “social media” is already intense. Nearly half of SMBs reported having a Facebook page for their business — even more than use email marketing.

## Use of Social Media



Source: BIA/Kelsey LCM Survey, Wave 14

# Social Ad Spend: Five-Year Forecast



**2010-2015 CAGRs:**

**Total Social CAGR 31.6%**

**Social Non-display CAGR 65.0%**

**Social Display CAGR 30.4%**

Note: Numbers are rounded.



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# One View of The Facebook Business Stack

## Social Integration

gigya janrain

## Software & Services

Apps Galore!

## Customized Marketing



## F-Commerce

Adgregate  
markets



## Marketing/Monitoring



SPROUT SOCIAL  
Business Tools for the Social Web

shoutlet™  
social media marketing tool

## Specialty Agencies



social code

webtrends™

# Facebook

# Google+

Consider the possible business integrations ...

- Place Pages “Go Social”
- Synergy With Offers
- Segmented Consumer Communication
- Ad Network?: Intent (search) + Interest (social) + Local (Places)

# The Established (but Evolving) Leader



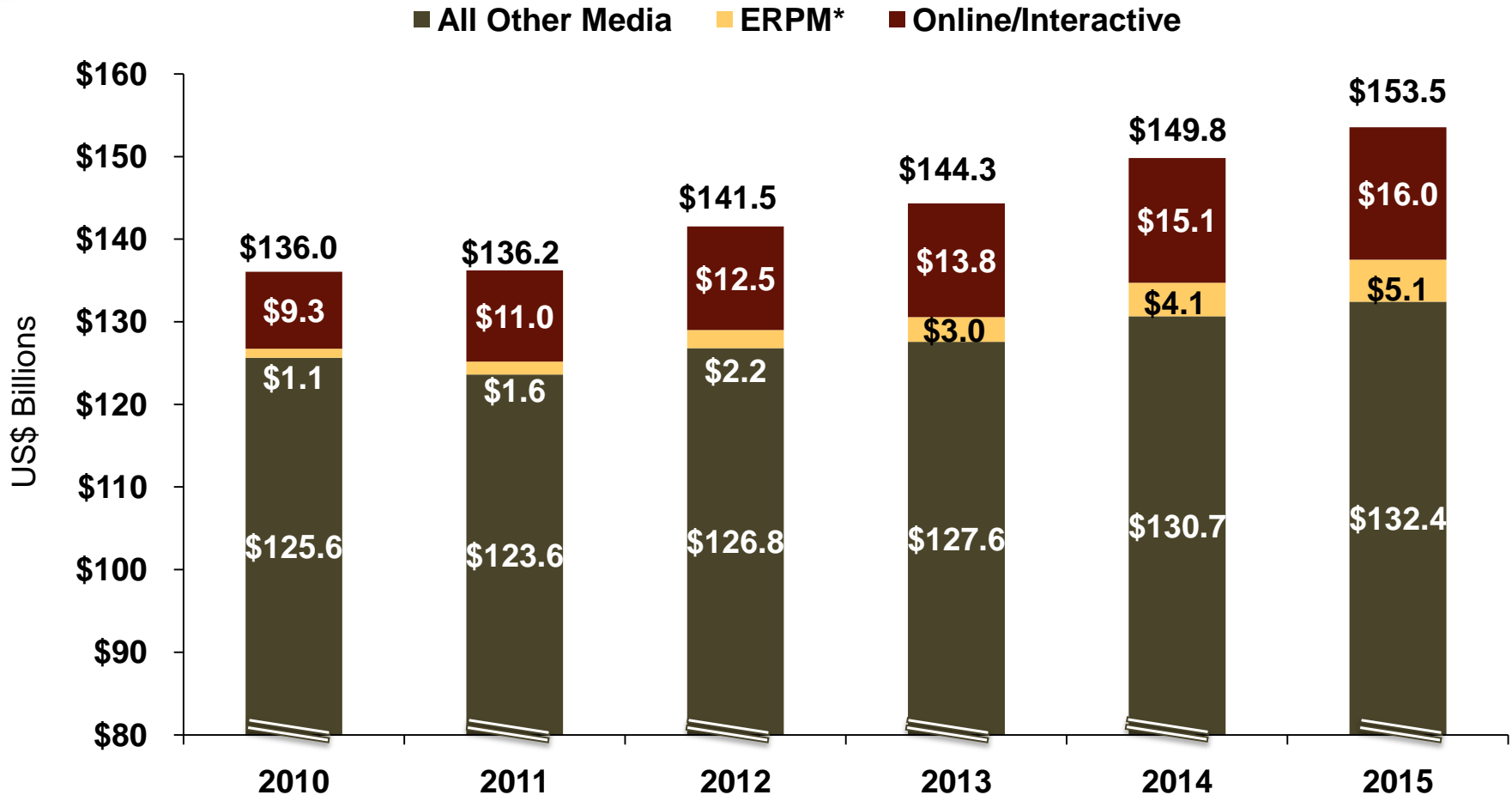
# Facebook Trends to Watch

- Facebook's ad revenues are currently a byproduct of volume (34% of display impressions). CPMs and CTRs continue to underperform the market. These should rise as multi-targeting is better utilized and ad formats/creative improve, but will still fall short of market averages.
- Facebook is testing Sponsored Stories and real-time ads to more dynamically leverage the social graph in order to boost engagement. It is also testing Facebook Credits through its Deals exchange and embarking on movie and music services that would utilize Credits.
- Facebook Ad Network: Coming in 2012?

# The State of Reputation Management



# Local Ad Spend: Five-Year Forecast: Massive ERPM Growth “The Communication Platform”



Digital revenues associated with traditional media (e.g., websites associated with local TV stations, local radio stations, newspapers and magazines) are included in the revenues for the traditional media, and are not included in Online/Interactive revenues above.

Note: Numbers are rounded.

\*ERPM = Email, Reputation and Presence Management

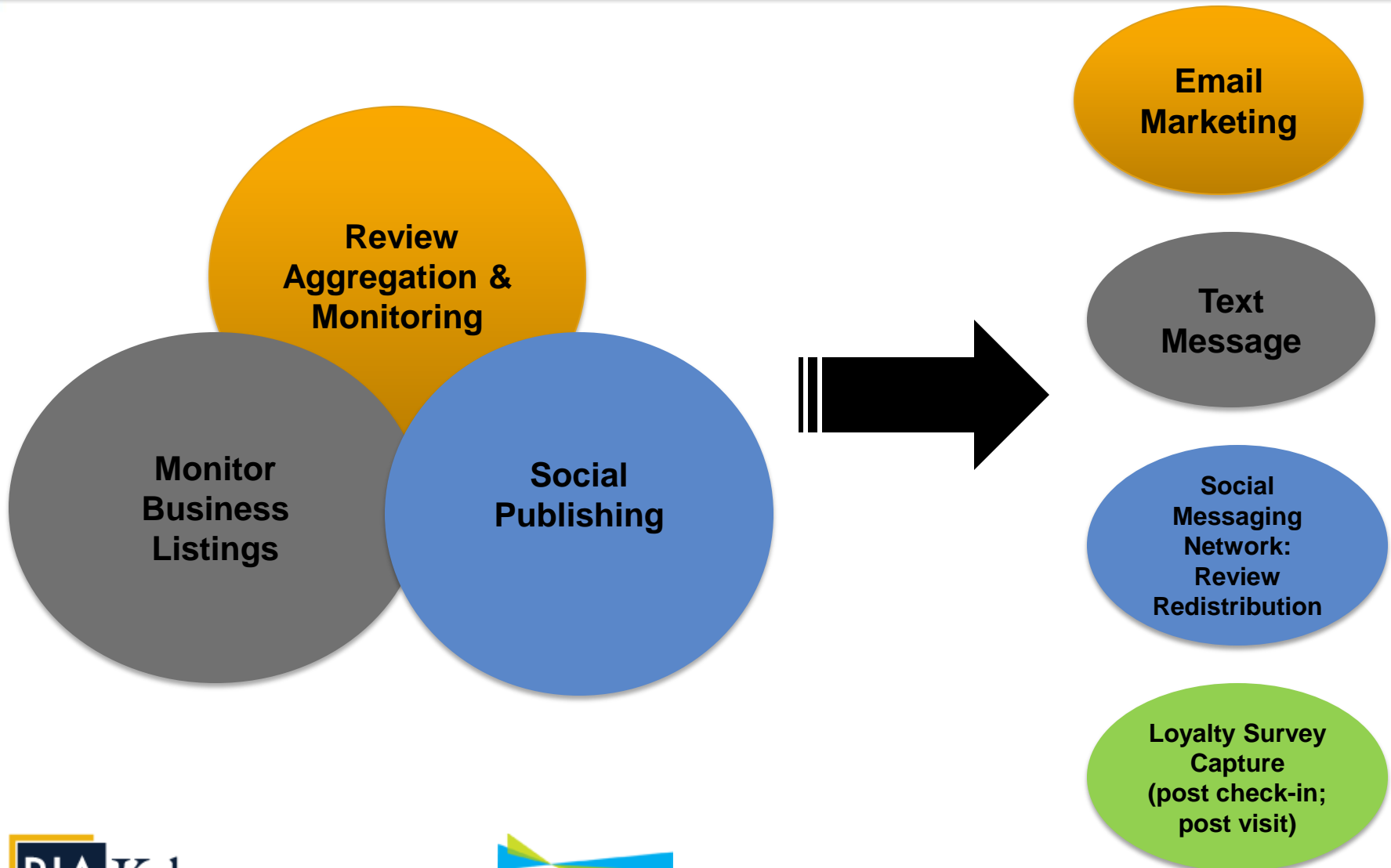


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# The Evolution of ERPM



# ERPM 2.0: The Holistic Social Messaging Platform

- I – Automated marketing communication platform
- II – “One click social publishing” & reviews syndication
- III – Loyalty integration (deals, offers, surveys)
- IV – Improved performance metrics: competitive benchmarking & “usable” influence scores



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## 24 Million U.S. SMBs can't be wrong! Small businesses are the new frontier for online and mobile marketing.

DMS '11 represents the turning point for SMB marketing. The biggest event in SMB online and marketing trends will focus on:

- Strategic directions for marketing SMB accounts
- Cutting edge social and mobile solutions
- Leveraging SMB-oriented sales forces
- The transformation of incumbent media

## Join hundreds of SMB advertising and marketing leaders in Denver!

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The Summit for Small-Business Advertising Solutions

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