

State of the Mobile Customer Experience for Multi-Location Brands

June 2017

Executive Overview

The Bottom Line: **Mobile Influences 56% of Offline Transactions**

Facebook, Google, Apple, Yelp and Bing – **over 80% of consumer time on mobile devices is now spent on the apps**, websites and properties of these tech giants.

In contrast, five years ago brands faced the challenge of building the infrastructure that would enable them to engage in two-way conversations with consumers through their own branded mobile websites and apps. **Today, the entire customer lifecycle plays out on just a select few network properties.** For everything from seeing an ad to looking for directions to reading a review or posting a comment about a brand, Facebook, Google, Apple, Yelp and Bing are now the definitive intermediaries between consumers and the companies they buy from.

These networks have taken out yesterday's competition – sidelining giants like Myspace, AOL and Yahoo – and they battle against each other daily to be the most used. These networks grow their market share and revenue by finding new ways to be even more relevant and useful to their visitors. **They've figured out that the network that is the most helpful to consumers will be the most used network** – thereby attracting the most media dollars. This is a fight for relevance. The better the recommendations, the more popular the service becomes.

As a trusted partner of Facebook, Yelp, Apple Maps, Bing, Instagram, Waze and Snapchat and an early tester with Google, MomentFeed has a unique view into the conversations between consumers and all these networks.

Working with these networks on behalf of some of the largest multi-location brands in the world has provided our team with exclusive insight into what works (and what doesn't) for brands trying to influence customers on mobile. MomentFeed's network partnerships provide data points across the brands' own properties as well as "earned" brand presence and "local" pages on these networks.

This report provides a benchmark of the current state of mobile consumer behavior and the dramatic effect mobile is having on brick-and-mortar businesses. We were inspired by anecdotal stories the MomentFeed team heard from our multi-location clients about the rapid changes happening in their typical customer journey. We wanted to prove these theories with real data, and help our clients better understand how their benchmarks stack up against the leaders in their industries.

This report explores these findings, comparing and contrasting businesses and industries. In addition to providing a benchmark, we also offer insights multi-location brands can use to justify budgets and better align marketing strategies around mobile consumer trends. Hopefully, this will help you better understand how your business should approach your digital presence as consumers demand more engagement from their nearest local store, branch, restaurant or showroom.

This report is based on the analysis of anonymized and aggregated engagement data from more than 50 clients from October 2016 through April 2017¹.

¹For more detail on the research methodology, please see Appendix A.

Introduction

Being Mobile First in a Mobile-Focused World

The consumer buying trends of just two years ago are dead and gone. Everything now points to a world where mobile reigns. By the latest measurements, mobile influences 56%² of all offline sales – with no signs of slowing down – which means those brands that want to turn mobile consumers into customers must adjust their strategy to put mobile in-store first.

But being a mobile-first brand is more than just enabling mobile reservations, online ordering or mobile pay at checkout (though these innovations are important and have been shown to influence customer buying decisions³). In our mobile-focused (maybe even mobile-obsessed) world, being a mobile-first brand means:

Embracing the reality that customers use mobile to look for places to buy offline

It's time to structure your marketing team around embracing the concept that new customers are only going to find you on their mobile devices – not TV, radio, or the yellow pages.

Understanding that consumers view social media, loyalty and customer care the same way

Consumers research online – primarily on mobile – and then use what they've learned to buy offline. Social networks like Facebook enable two-way communication with consumers and brands, and native advertising, customer inquiries and other communications happen inside the same interface. User experiences are now more complete than any single form of media. This pattern of mobile influence must be understood and be at the heart of every stage of interaction with potential customers.⁴

Building your strategy around multiple mobile moments

Today's consumers engage with businesses through a variety of mobile services: social media, search engines, maps, review and rating services, voice assistants and more. Brands that are truly mobile-first understand and embrace this as part of the new customer experience. They are building comprehensive programs that encompass and incorporate all those consumer interactions and touchpoints.

These realizations have been validated by countless anecdotal stories recounted by clients to the MomentFeed client success team. Until now, they have not been considered in aggregate through reliable data analysis. To provide a benchmark for our clients, MomentFeed set out in early 2017 to gather and analyze the data that would prove these mobile-first strategies. The analysis of this large dataset has revealed three primary insights:

- 01. Local digital engagement is 5x more impactful on consumer behavior than brand engagement.**
- 02. A one-network strategy doesn't cut it. Each network has something important to offer.**
- 03. Accuracy matters. It means much more than location coordinates**

In this report, we will explore each of these findings as well as several special cases that consider the data by business size or industry type.

Mobile Devices are going from being a single channel to becoming the *only* channel.

² Deloitte "Driving purchase and brand loyalty in a digital-first world", 2017

³ 2016 Customer Engagement Technology Study, Hospitality Technology.

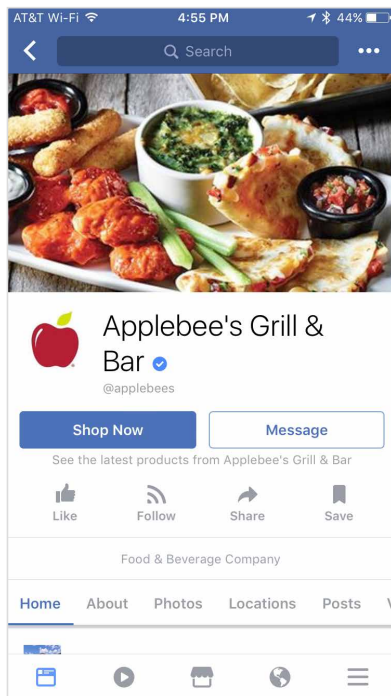
⁴ For more explanation on how multi-location brands can succeed through digital influence, reference Keys to Winning Multi-Location Digital Strategy by MomentFeed.

Local Has 5x The Impact of Brand

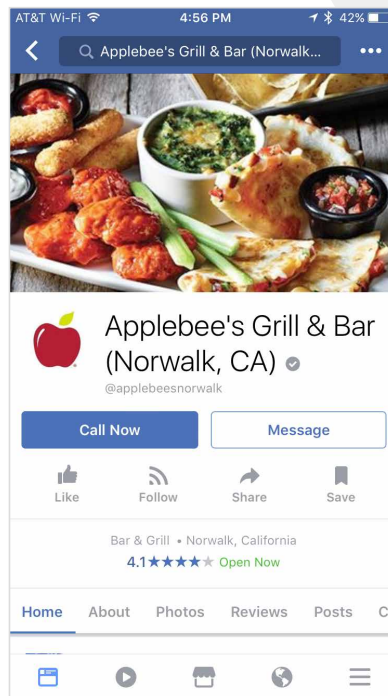
At MomentFeed we expected that the digital assets that represent the individual stores, shops and restaurants of multi-location businesses would have higher customer interactions than those assets that represent the brand at the national level. We were also anticipating these local assets to have more than 50% of total brand exposure.

However, as we aggregated data across all business sizes and verticals, we found that an astonishing 84.8% of all consumer impressions happen on assets that represent individual stores, showrooms and restaurants. Just 15.2% of impressions happen on brand or corporate assets – including the brand's own website.

Facebook Brand Page



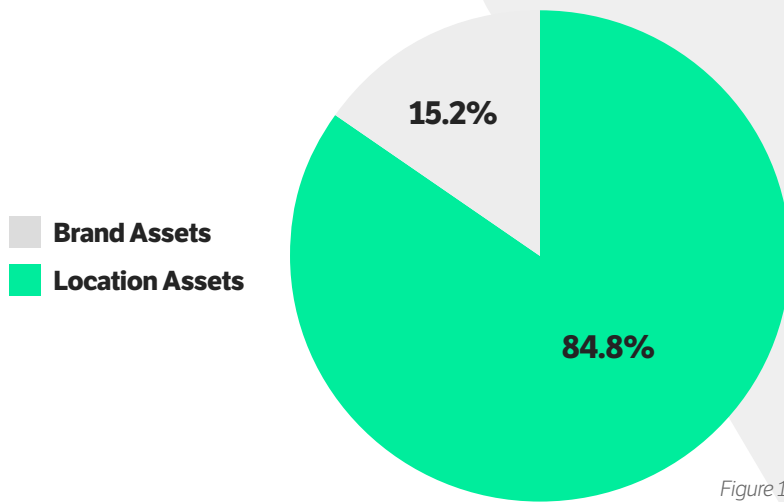
Facebook Local Page



This means that 85% of total consumer engagement is happening on local pages – NOT on your master brand profiles and official corporate website.

This is an about-face from our findings two years ago when Local Pages were just introduced by Facebook, and is a directive that all multi-location brands need to embrace to be successful.

Local vs Brand Digital Assets



The only way to get significant exposure on mobile is to leverage local assets as the first line of engagement. The brand should now be second (an important second, but still second).

Making this shift to emphasize local digital assets is a huge change from how marketing resources are typically deployed. Investments in brand website, national digital advertising, and brand social media engagement should now take second priority to efforts to engage consumers through digital local assets.

The work needed to customize each location for authentic customer engagement can seem daunting. However, with tools designed to facilitate neighborhood campaigns, this customization can be done relatively easily without additional resources. Dynamic copy and leveraging user-generated content are two easy ways to maintain an active, location-based social media strategy that can take full advantage of Facebook Pages, which are the single most trafficked source for multi-location brands.

Take Action

Two easy ways to maintain an active, location-based social media strategy:

01. Dynamic copy
02. User-generated content

Use these to take advantage of the fact that local Facebook pages are the single most trafficked source for multi-location brands.

Data and Analysis

The data in Figure 2 showcases a huge trend in location-based assets. Consumers demand relevance, and location-specific information is what is most relevant to them. We were able to analyze and rank consumer expectations and priorities.

- 01. Information about the locations nearest to them**, as demonstrated by 66% of consumers' impressions happening on Facebook and 96% of those impressions taking place on location-based pages.
- 02. Directions to their nearest store**, proven by the second largest source of impressions being Google Maps views at 18% of overall impressions.
- 03.** And finally, only after these first two needs are met, possibly an interest in brand-level information from the corporate website, which shows 15% of overall impressions.

The remaining 1% of consumer impressions took place on Bing and other networks.

Impressions of Brand Assets by Network

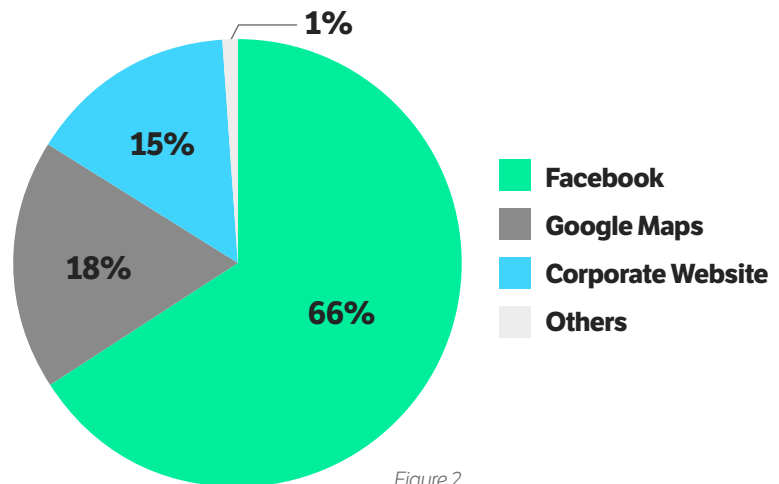


Figure 2

Detailed Breakdown of Brand Assets

Local	Local Landing Page Views	2%
Local	Store Locator Page Views	1%
Local	FB Local Organic Post Impressions	64%
Local	Google Maps Views	18%
Local	Bing Impressions	1%
Local	Total Local Impressions	85%
National	Facebook Organic Brand Post Impressions	2%
National	Net Brand Website Page Views	13%
National	Total Brand Impressions	15%

Figure 3

After consumers discover and engage with your brand through local social media pages, they want to take the next step by visiting the location for themselves. This is proven through the data as Google Maps views are the second largest source of customer traffic seen in Figure 3. This second priority also contributes to the third largest source of traffic, which is corporate websites. Of these site visits, 20% of them were to location-specific sections of the corporate site such as location landing pages and location map views – showing that even in this third highest traffic source, consumers are still focused on finding the directions they need to get to your locations. This makes it very clear that customers

care more about how to get to your location than about overarching corporate messages.

While Bing only has less than 1% of share on page views, it should not be discounted as it powers Yahoo Search, so it's under-reported. As third-party technologies – like Alexa and Siri, which use Bing to make recommendations – increase in adoption multi-location, brands can also expect Bing's relevance and market share to continue to grow.

This brings us to our second insight on the importance of building a strategy that includes all these various networks.

The Mobile Customer Buying Journey

A review of the stages of the mobile customer experience quickly reveals that there's not just one network to keep your eye on.

Stage 1: Awareness. Consumers must know who you are if they're to purchase from you. Today's consumer is doing more research than ever – before they even step foot in a store – and native social media advertising is at the heart of discovery, with 2 in every 5 mobile minutes spent on Facebook, Instagram and Snapchat.

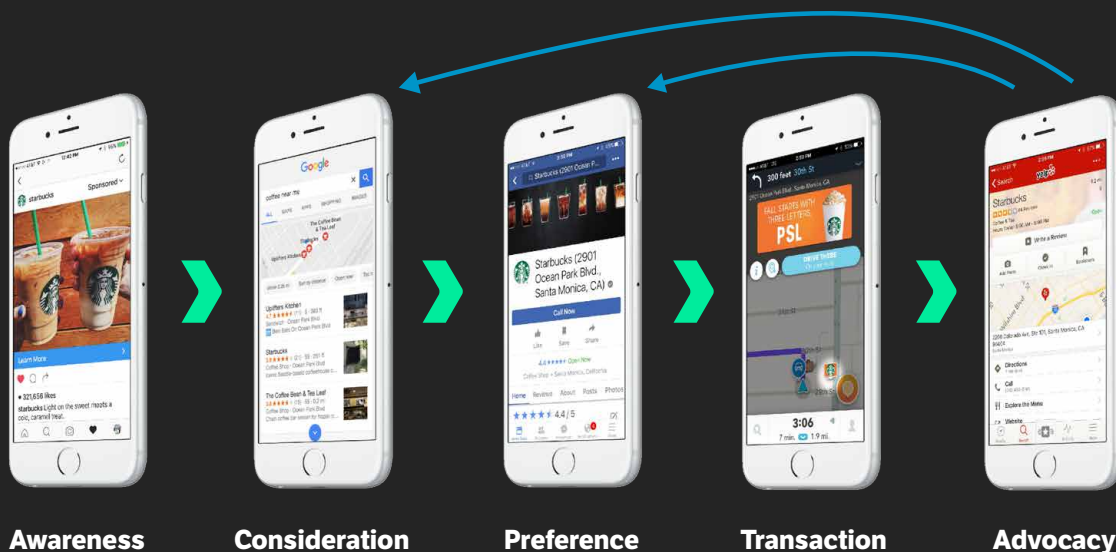
Stage 2: Consideration. Consumers must be able to find you, online and offline, if they're to put in the effort to purchase from you. Every mobile search is now a “near me” search by default. Consumers want relevant information, and, with its 77% global search market share, Google delivers. Bing is also important here as it drives voice search assistants like Apple's Siri and Amazon's Alexa.

Stage 3: Preference. Consumers want to hear what others have to say when they're considering a purchase. Curated user-generated content published on location pages is 20% more influential and 30% more memorable than other types of media. The preference phase of the buyer cycle spans networks like Yelp, Trip Advisor, Facebook, Google My Business and Instagram.

Stage 4: Transaction. Consumers need clear, compelling calls to action to convert them to customers. Mobile consumers click to call, click to order ahead or make a reservation, or click to navigate on their phone's map app – Apple Maps, Google Maps, or Waze. And while measuring the efficacy of digital marketing on offline sales has been challenging in the past, Facebook Local Insights now gives marketers precise, measurable attribution for all mobile marketing efforts.

Stage 5: Advocacy. Here loyal customers buy again and help you attract new customers through referrals, increasing sales. Review juggernauts like Yelp and Trip Advisor are vital here, with Google My Business and Facebook also playing important roles.

As we reviewed the data, the priorities of today's consumers and the stages of the mobile customer experience re-confirmed that each network has a role to play. Building a strategy that doesn't include them all is leaving money on the table.



A One-Network Strategy Doesn't Cut It

Social media interaction with brands has never been higher, and with 85% of your brand's interactions taking place through local business social profiles, reviews, and maps, there's not a one-size-fits all approach or a single place that is THE place to put all your focus. You need to know what customers are saying and proactively respond to them everywhere because they're engaging with business pages across multiple networks at every stage in their buying journey.

Network-Specific Numbers

MomentFeed's partnerships also enabled us to examine the specific results clients see across several networks.

Facebook

Facebook is the single largest source of consumer page views in our research. As 88% of consumers trust online reviews as much as the recommendations of family members, it's no wonder that local pages get more views. Online reviews show real feedback from other users, not direct communication from a corporate brand, which makes the review more relevant to the consumer. Facebook Local social media pages take it one step further by enabling consumers to see what their neighborhood is saying about a brand.

Local pages are taking consumers' demand for relevance from brands to another level. This is demonstrated in the data with **25x more impressions** taking place on location-based Facebook pages than on corporate (brand) Facebook pages. This underscores the importance of maintaining active, authentic, location-specific pages on this network to remain relevant and effective at engaging with current, and potential, customers.

Facebook Local impressions = 25x Brand Pages



Take Action

Choosing to focus on just one network is like leaving money on the table. Build a strategy that includes them all.

Facebook – Maintain active, authentic, location-specific pages.

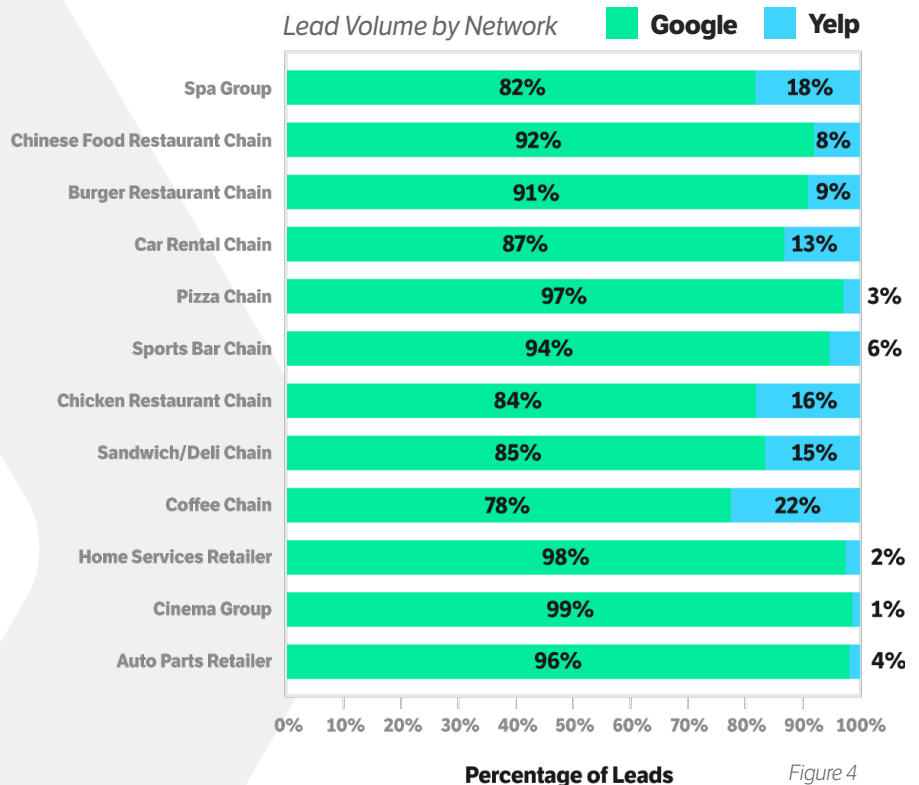
Google – Drive leads and be there when consumers are looking for you.

Yelp – Achieve higher conversion rates by ensuring you have positive reviews and a proactive response strategy.

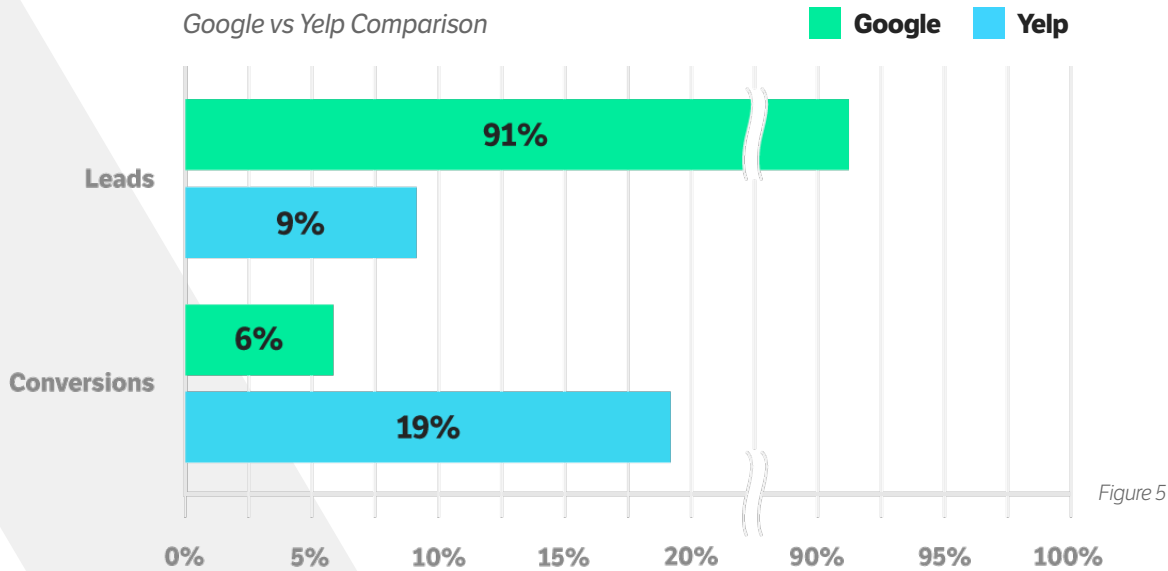
Bing – Make sure you're included in recommendations when consumers turn to voice assistants and other tools.

Google and Yelp

MomentFeed's research profiled 12 clients across three different verticals (retail products, retail services, and restaurants) to gain insight into conversion data. Over 3 million impressions were tallied over one month, and this data revealed some interesting differences in lead source and conversion rates between Google and Yelp – further highlighting why a one-network approach is ineffective.



However, the Yelp views converted at 19% compared to Google leads that converted at just 6%, showing that both networks are extremely important. Google provides the volume, and Yelp users are more serious about immediately moving to a transaction.



This research found that overall 91% of leads (measured as “clicks to call,” “clicks to order” and “clicks to navigate”) were coming from Google and 9% from Yelp.

Even in the cases where Yelp provides only 1-2% of leads, due to the very high conversion rate of those visits, that seemingly small percentage of total share of impressions can represent tens of thousands of customers.

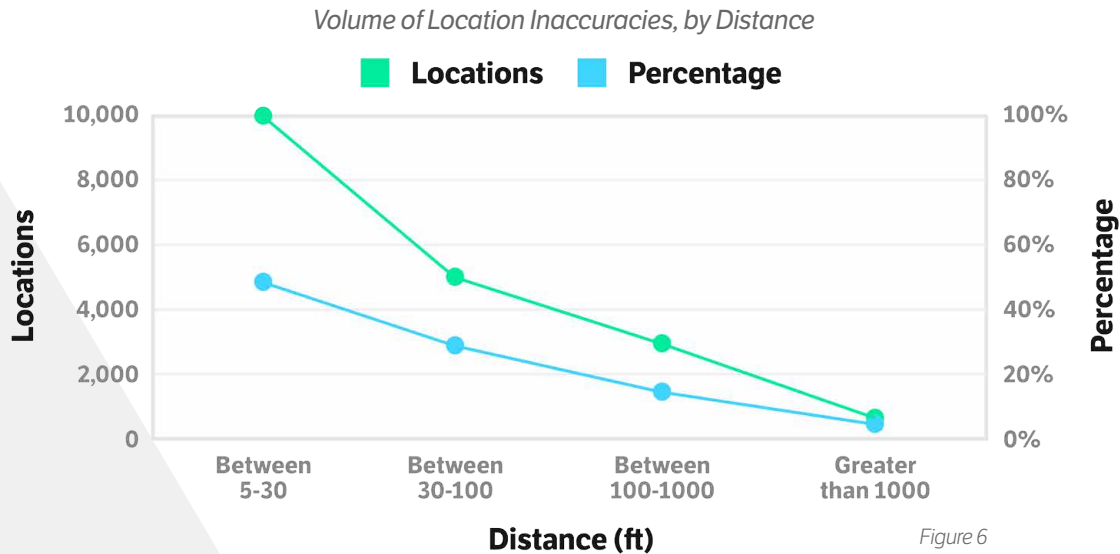
Accuracy Matters

When our research revealed that Google Map views have more impressions than brands’ websites (and again when we found that even when consumers did go to a brand’s website, 20% of those visits are still focused on store location information), we decided to look at how much location data accuracy matters to mobile consumers. The short answer is that accuracy matters. A lot.

MomentFeed had access to the data for this analysis because we provide a proprietary geo-coding location data cleanup technology called PinSync™. The PinSync process includes a double-blind data entry looking at where map data should be placed and comparing that against client-provided data and living data from map services like Google Maps. From there, latitude and longitude coordinates are updated to provide location placement accuracy, with the goal of directing customers to the front door of a location.

Map and navigation services – whether on mobile devices or in cars’ OEM navigation systems – don’t use location addresses to provide a route, they use latitude and longitude. Ensuring these coordinates are accurate is the difference between driving to a business’ parking lot or ending up at a competitor’s business on the next block.

For this analysis, MomentFeed considered latitude and longitude data for the 20,000 business locations that were recently stored in the MomentFeed Mobile Customer Experience Management platform. The data showed that of these locations, a staggering 94% had location inaccuracies before they were accurately mapped with PinSync.



About half of the inaccuracies were within 5 to 30 feet. While it may seem that being “only” 30 feet off is “good enough” for location numbers show that this still impacts consumer behavior – especially in malls. In fact, 67% of consumers say they lose trust in a brand if inaccurate location information is provided online. While under 30 feet may be close to a store, this “good enough” is the difference between a consumer successfully routing to a business location or looking around with impatience and simply giving up to move on to a competitor’s location they can actually find. In a world of fleeting mobile moments, that could be a precious missed opportunity to impress the customer and meet their expectations.

More importantly, 46% of locations had geocode inaccuracies greater than 30 feet. This is where the customer experience takes a truly negative downturn. With location information off by this much, customers are no longer simply walking into your store to get what they came for; they are walking in frustrated by the feeling of being lost. Worse yet, some customers may not even make it into the store.

Considering the effect of ratings and reviews on consideration during the mobile customer experience, the importance of location accuracy can’t be underestimated. More customers are looking at Google search results for store directions than are looking at any corporate website for this information. Consider this:

If a corporate website had wrong information posted as often as Google Map location inaccuracies, CMOs would be replacing marketing headcount all the time.

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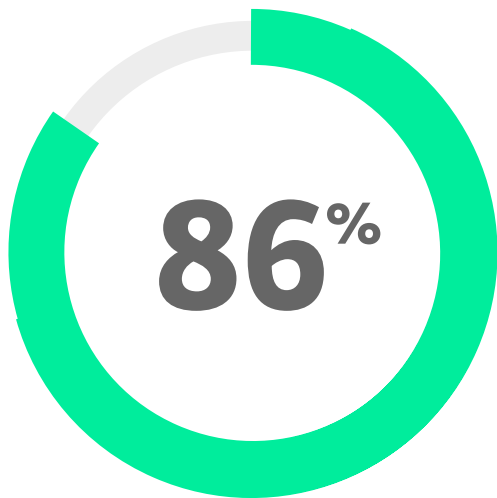
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Reviews from the web

92% Groupon · 75 reviews

This gap in corporate marketing's time spent versus consumer demand is creating a huge hole where the biggest loser is the customer. Making location data accuracy a priority can be a huge windfall for a multi-location brand as it aligns marketing resources with consumer behavior, leading to more customers viewing store page details and ultimately walking in the front door.

In reviewing clients that have adopted the MomentFeed platform with this location data cleanup, we have found that clients see an average increase in Google My Business pageviews of 86% over the first 9 months.



The data also show that Google My Business page views convert to leads 6% of the time, which means cleaning up location data directly translates to more customers driving straight to each location. As we've seen that consumer impressions are strongly focused on local pages and profiles, it makes sense that the best customer experience would require that a brand's location information be correct.

Location Data is More Than Just Coordinates

Accuracy for location data goes far beyond coordinates – it's all the information that makes each business unique and appealing to local consumers.

Physical location and store hours are the first generation of location data. Networks' battle for relevance will only drive more and more location data into the fold. Amenities like Wi-Fi, drive through, patio seating, pet friendly, and so on, will combine with more detailed information like searchable menus (now on Google My Business) and store inventory to create a second generation of business information that will only attract more customers.

In the not too distant future (think 18 months), these much harder-to-address attributes will become consumers' expectation, leaving brands that still haven't figured out first-generation location data accuracy completely in the dust.

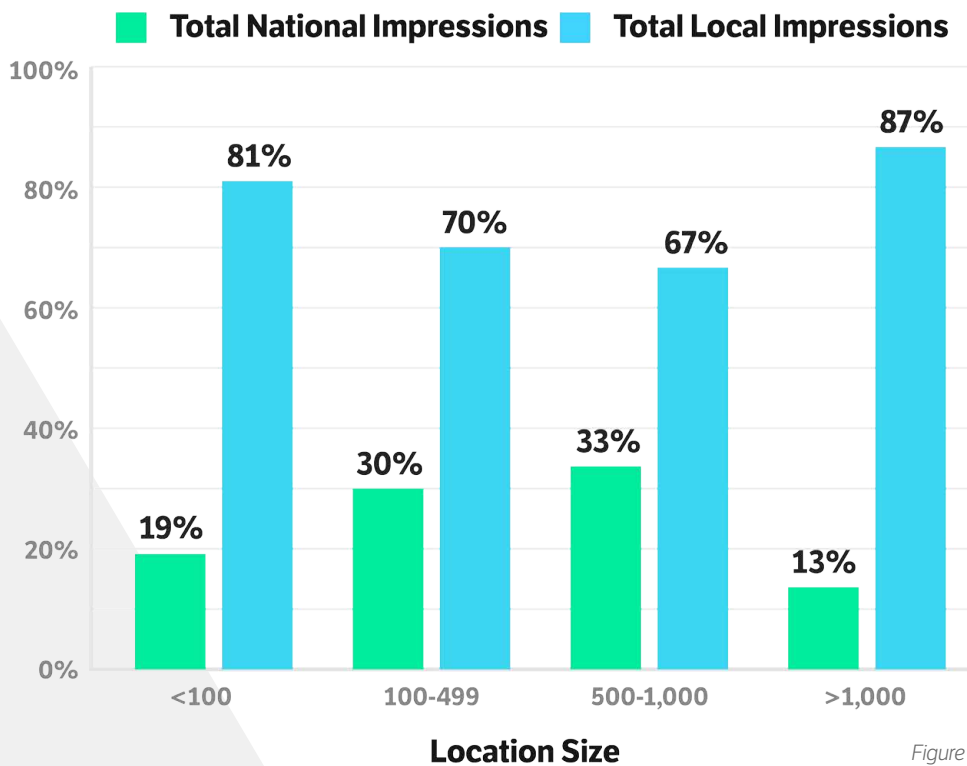
Special Cases

After gathering and analyzing the information for our three main insights, it quickly became clear that there are a number of other ways to slice the data. A few of those insights we found most interesting were the size of the business and the industry, specifically: retail brands, retail services and restaurants.

Take Action

Need same store sales growth? Make location data accuracy a priority.

- Align resources with consumer intent
- Get more customers viewing correct details
- Drive more customers through your doors



Size Does Matter

Breaking the data down to see brand versus local impressions by the number of locations a brand has shows that while most impressions are local in every case, total local impressions is highest for brands under 100 locations and those over 1,000 locations. If you have fewer than 100 locations, it's likely you still have a bit of a mom-and-pop feel and customers aren't too familiar with your brand apart from the location they frequent. For those brands with over 1,000 locations, customers want location-specific information – they're interested in the special promotions tied to their location that they can act on rather than national brand news that may have little effect on them.

Local impressions are lowest for those brands in the 100 to 1,000 categories. However, brands in these size brackets also have the highest number of Google Maps views, which implies that customers know the brands and are familiar with them, but their priority in this case is simply how to get to the store or restaurant. The lower local impressions here may indicate an opportunity to make these mid-tier brands more relevant. Bandwidth issues may be affecting their ability to put out the local content that customers clearly want from larger brands.

Take Action

Lower local impressions for brands with 100 to 1,000 locations may indicate an opportunity to stand out.

Put out the local content that customers want from larger brands.

Retailers

As we look at the retail space and those companies selling products at local stores, brand website impressions represent the single largest source of page traffic followed by Google Map views. This makes sense as retail websites house the information about the specific products being sold. However, this doesn't mean the earlier insights don't apply. Consumers generally want to buy from brick-and-mortar businesses – these purchases still make up more than 90% of all goods sold in the US.

The importance of accurate location information is paramount because the combination of views on Google Maps, location landing pages, and store locator pages is 40% of overall impressions. In the retail product industry, the most important thing is the product – but how to get to the store to buy the product is arguably just as important. Brands need to ensure they're providing accurate information and getting their customers to their stores and over the threshold. After all, that's what drives revenue.

As we look at the retail space, brand website impressions represent the single largest source of page traffic followed by Google Map views. As retail websites house the information about the specific products being sold this makes sense. However, this doesn't mean the insights don't apply.

The importance of accurate location information is paramount because the combination of views on Google Maps, location landing pages, and store locator pages is **40% of overall impressions**. In the retail product industry, the most important thing is the product – but how to get to the store to buy the product is a close second. Brands need to ensure they're providing accurate information and getting their customers to their stores and all the way through the doors. After all, that's what drives revenue.

Retail Services

For the retail services companies like fitness clubs, salons, shipping centers, movie theaters, auto services and many others, location-specific information is almost 90% of overall impressions. Location-specific

Impressions by Network, by Vertical

	Bing	Website	Google	FB	Total Impressions
Fitness	1%	8%	8%	84%	100%
Restaurant	1%	19%	19%	61%	100%
Retail	7%	60%	29%	4%	100%
Services	1%	21%	7%	71%	100%
Grand Total	1%	15%	18%	66%	100%

Figure 8

Facebook pages represent 80% of impressions as customers don't resonate with the corporate brand; they resonate with their locations – the places nearest to where they live and work.

At the end of the day, the location nearest to the customer is the only representation of the overall brand that the consumer truly cares about. In cases like this, building a strong location-based branding strategy through each of the digital storefronts that represent a specific location is the methodology you need to use to convert consumers from mobile browser to in-store customers.

Restaurants

For chain restaurants, location information mirrors the overall trends discussed earlier. Local impressions drive over 80% of overall consumer traffic and Facebook Local pages are the single largest source of digital consumers.

Within this context, potential guests are simply looking for a nearby restaurant that matches their taste. A restaurant opening in another county or a corporate level announcement simply isn't relevant to them. A local restaurant and its unique information – reviews, menu, pictures, and offers from the local store – is what they need to make a decision. This trend is true across all three restaurant groups profiled in the data – quick serve, casual dining, and pizza.

In this industry group, the next-most visited data source is maps (Apple Maps, Google My Business and Waze). Once diners decide where they want to go, they look for how to get there, which means restaurant brands need to ensure they're not only providing information for consideration, but also accurate location information for transactions to ensure hungry diners can get to their next meal.

Conclusion

There's no question that being successful as a multi-location brand in today's mobile-first world can be challenging. However, this research shows that keeping a few key insights in mind can make a big difference in consumer influence.

Local Has 5x The Impact of Brand

This is a major shift from the way things used to be. Just two years ago, consumers engaged more with brands through corporate pages and profiles. But now, 85% of your consumer interactions are happening on location-specific pages – due to the dominance of mobile.

Brands need to maintain active, authentic, location-based social media strategies. Tools like dynamic ad copy highlighting the specifics of the nearest location and user-generated content can ensure campaigns speak with an authentic neighborhood voice without requiring you to add extra staff.

A One-Network Strategy Doesn't Cut It

The numbers are in, and it's clear that putting all your eggs in one basket isn't a good idea (is it ever?). The results vary across networks, but choosing to ignore any of them means leaving money on the table because each network has something to offer and a different set of loyal consumers to attract.

Build a strategy that includes them all. On Facebook maintain active, location-specific pages; on Google drive leads and be on Maps when consumers are looking for you; on Yelp listings benefit from higher conversion rates with a proactive response strategy; and on Bing make sure you're included in recommendations when consumers turn to voice assistants and other tools.

Apple uses Apple Maps, Yelp, and Bing data for recommendations on iPhones and iPads.

Accuracy Matters

Building on the previous two insights, it only makes sense that the best customer experience would require that a brand's location information be correct. However, a staggering 94% of client locations showed inaccurate information before undertaking the onboarding cleanup process with MomentFeed.

Making location data accuracy a priority can be a windfall for brands as it brings marketing resources in line with what consumers want (remember, 67% of consumers say they lose trust in a brand if inaccurate information is posted online). By providing accurate information, more consumers have the details they need to make the effort to buy from you.

How Do the Numbers Apply To YOU

Your business's size and industry can make a difference in what mobile consumer data can tell you. Brands with 100 to 1,000 locations may be able to stand out and take their business to the next level by acting like an even larger brand and giving the people more of what they want (i.e. location-specific social media engagement).

We'd like to hear from you about your specific needs to see how MomentFeed's data can get you where you need to be in a mobile-first world.

Contact us at hello@momentfeed.com

Appendix A:

Detailed Research Methodology

The team at MomentFeed began this research process by selecting 60 different clients from three different verticals – retail products, retail services and restaurants. These clients ranged in size, with the smallest client being a 30-location brand and the largest client being a 2,700-location brand.

We asked for participation in this study, and secured permission from these clients to access their raw impression and engagement data from their web analytics tools for all “owned” digital media, including the brand’s website, ecommerce website (retail clients only) and website location finder.

We also gathered data for “earned” media including corporate social media properties (brand pages) across Google, Facebook, Instagram, Twitter and Yelp. In addition, we gathered the same data for the assets that represented each of their locations across the same social networks. We also looked at search impressions for organic listings for both brand and location-based assets in Google and Bing.

MomentFeed also gathered impression data for earned media and third-party channels for each client, including comments and reviews across social media profiles, map views across multiple search platforms and social media profiles for each individual location.

The combination of these data sources led to an overall view of each brand’s consumer impressions across their own website, Google, Facebook, Instagram, Yelp and Bing as well as map-views of each brand. In total, this amounted to over 200 million impressions that were analyzed to develop this understanding of consumer behavior for multi-location brands.

About MomentFeed

“ Using MomentFeed is like having an army of online marketers – one at every location – all working in unison to drive mobile consumers to each store. ”

Need an Online Marketing Army?

MomentFeed's mobile customer experience management software enables multi-location brands to make their nearest location the best choice for every mobile customer. The modular platform helps organizations distribute consumer engagement to the store or neighborhood level, creating a mobile customer experience that is more authentic, relevant and engaging for local consumers.

With a consistent customer experience across mobile search, social media, mobile advertising and customer care, the platform helps continuously and predictably capture more sales for retailers, restaurant chains, banks, auto dealers, insurance companies and other franchised and corporate-owned multi-location businesses. MomentFeed was founded in 2010 and is headquartered in Santa Monica, California. For more information visit www.momentfeed.com.

