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BRAND BEACON REPORT 2024

Benchmarking Local Marketing Excellence for Multi-location Brands

DISCOVERING THE KEY TO MULTI-LOCATION MARKETING PERFORMANCE IN 2024

It's no secret that brick-and-mortar businesses have had it rough in recent years. Rapid changes in public health and safety, economic turmoil, and political disruption have affected the world, causing significant shifts in consumer behavior.

Of course, businesses in every sector will face unique challenges. But only multi-location marketers will know the ongoing chess game of managing a brand at local, regional, and national levels.

We wanted to understand the challenges multi-location businesses face in 2024, how they might differ based on their size, and what drives marketing performance.

To achieve this, we asked **200 marketing decision makers** working in multi-location brands in **the USA, Canada, and the UK** about their marketing performance, investments, and strategies to build a picture of the current multi-location landscape and understand **the key to high performance in 2024.**

Throughout the Brand Beacon Report, we'll discuss critical themes of marketing technology, the importance of customer satisfaction and retention, and areas of opportunity in marketing tactics.
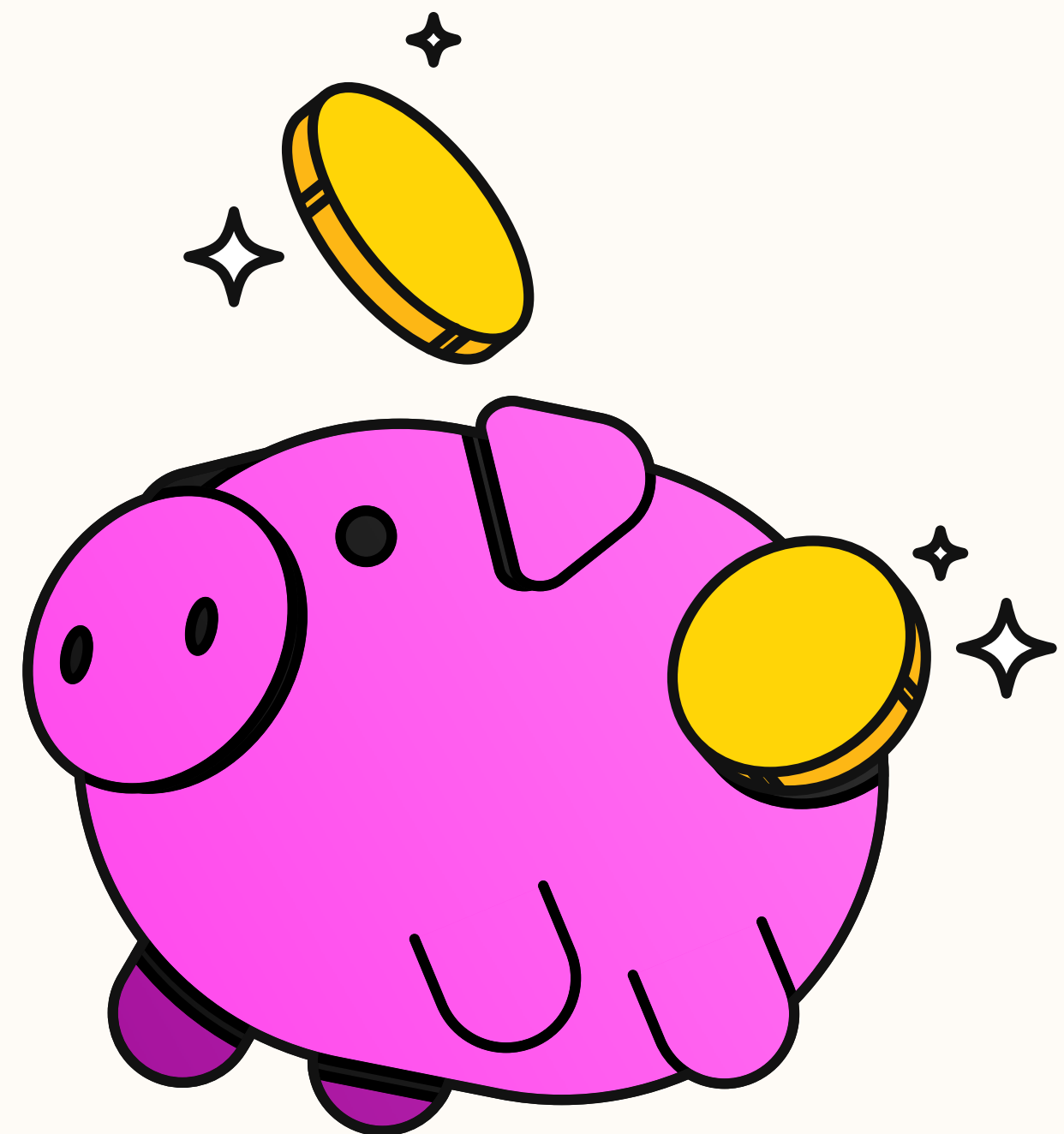
01

THE MULTI-LOCATION MARKETING LANDSCAPE: KEY TRENDS

What's shaping multi-location marketing tactics in 2024?
Are marketers feeling bullish or bleak about the year ahead?

Kicking off with an overview of the market in general, we looked at how brand marketers feel they've been performing, what channels they're investing in, and what local marketing looks like for them.

HOW ARE BRANDS FEELING ABOUT THEIR MARKETING PERFORMANCE?

Most marketing decision-makers at multi-location businesses are feeling pleased with their 2023 performance, and feel like the year ahead shouldn't present a challenge, economically.

Just **4%** of multi-location marketers feel their marketing performance fell below expectations in 2023.

With almost two-thirds reporting that performance exceeded expectations, it's a highly positive perception of their teams' capabilities.

Additionally, **77%** feel optimistic about the economic conditions for their industries in 2024.

63%

of multi-location marketers believe their marketing **"exceeded expectations"** in 2023.
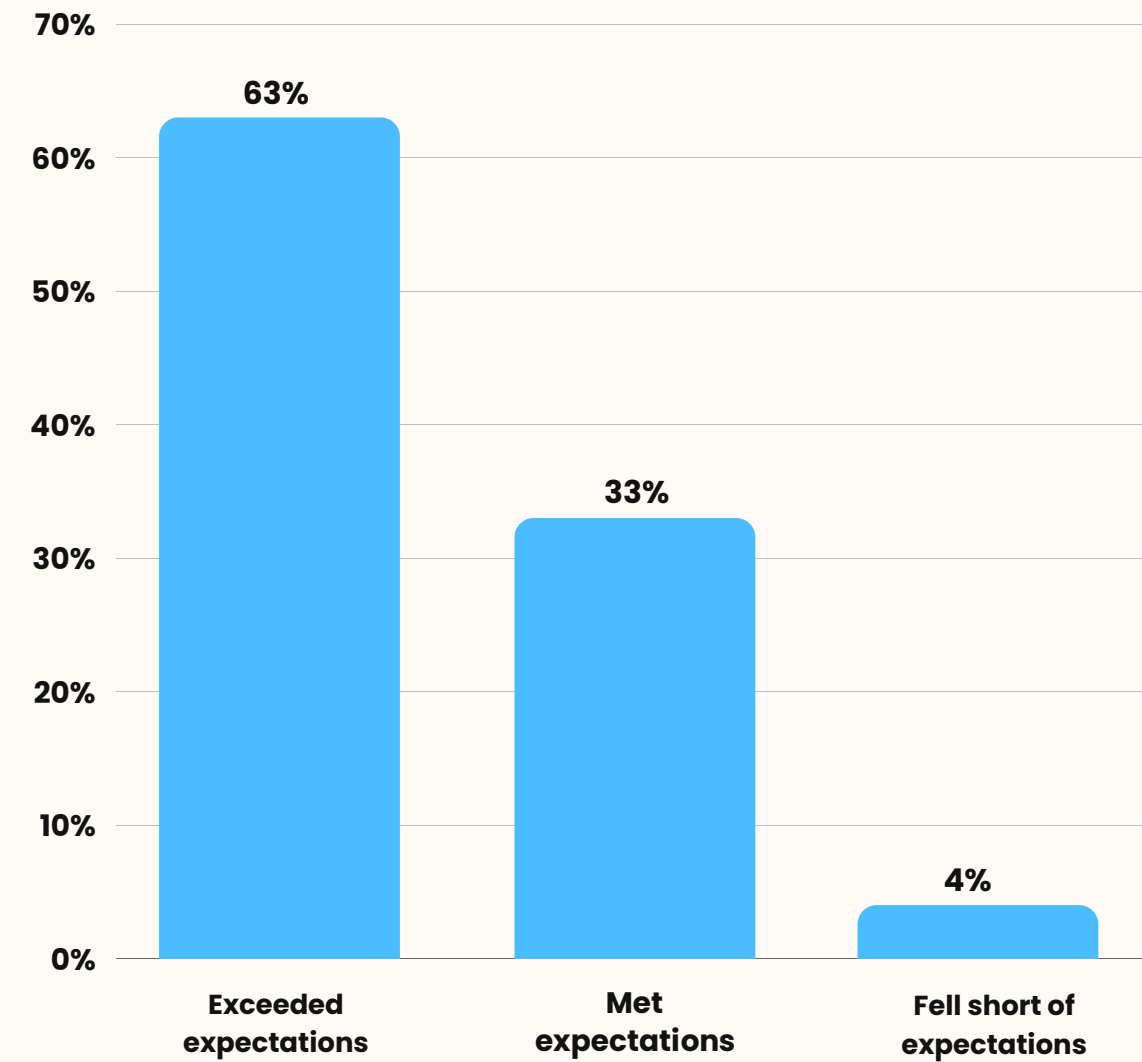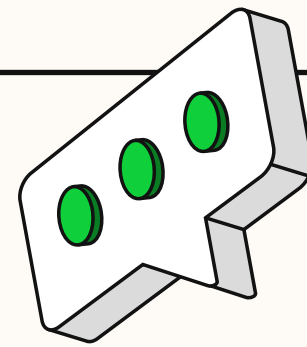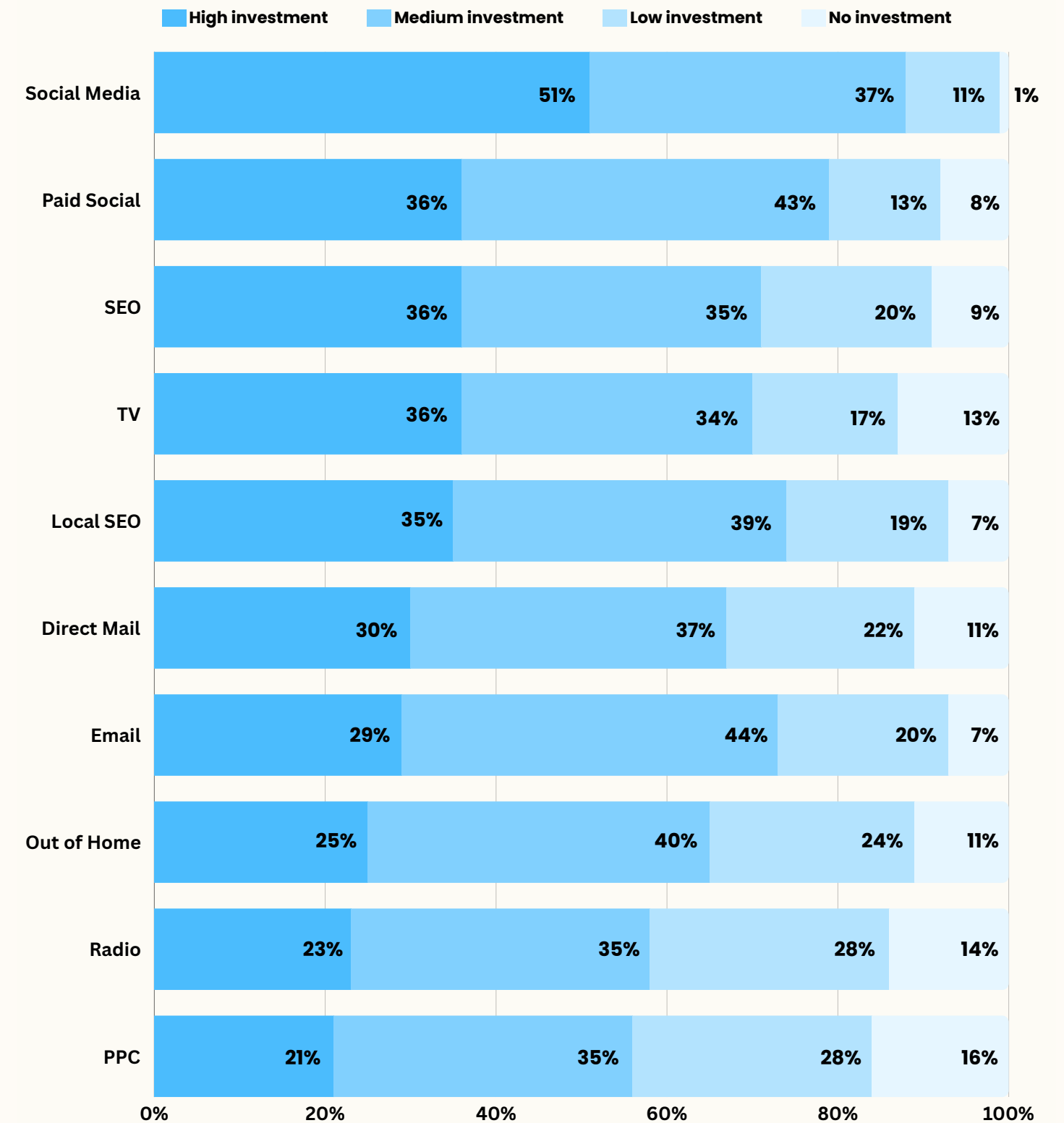
WHAT MARKETING CHANNELS ARE MULTI-LOCATION BRANDS INVESTING IN?

An impressive **99%** of multi-location brands are investing in social media, with **88%** investing a medium-high amount in this channel. This result is significantly higher than the other marketing channels listed, so it's clear that social media forms a vital part of multi-location marketing strategies.

Paid social, SEO, TV advertising, and local SEO are the next most invested-in marketing channels. This shows that multi-location businesses are investing in brand awareness channels (paid social and TV) while also focusing on the importance of visibility (SEO and local SEO).

It's interesting, then, that PPC is at the bottom of the list for channel investment. Sitting lower than traditional forms of marketing (direct marketing, radio, out-of-home advertising), this could suggest that brands do not see the best returns from PPC for brand awareness.

Alternatively, it could just be that multi-location brands use PPC for smaller or more targeted strategies and are getting more from their campaigns for lower spend.

Legend: ■ High investment ■ Medium investment ■ Low investment ■ No investment

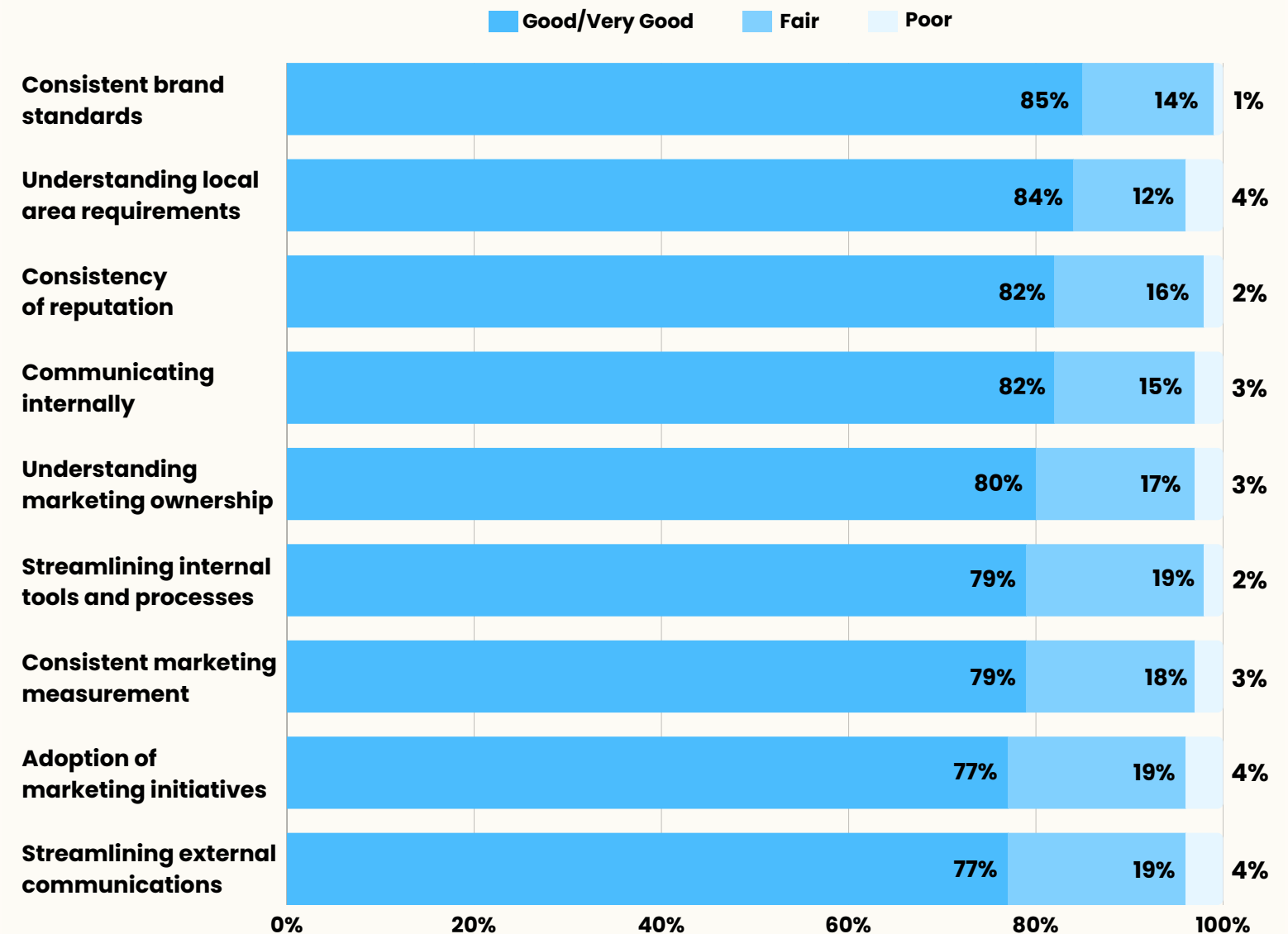| Channel	High investment	Medium investment	Low investment	No investment
Social Media	51%	37%	11%	1%
Paid Social	36%	43%	13%	8%
SEO	36%	35%	20%	9%
TV	36%	34%	17%	13%
Local SEO	35%	39%	19%	7%
Direct Mail	30%	37%	22%	11%
Email	29%	44%	20%	7%
Out of Home	25%	40%	24%	11%
Radio	23%	35%	28%	14%
PPC	21%	35%	28%	16%

HOW DO MARKETERS RATE THEIR BUSINESSES' ABILITY TO TACKLE MULTI-LOCATION MARKETING CHALLENGES?

As mentioned right at the top, multi-location brands will face different challenges than other business types. Consistency is certainly one, as brands must replicate the same standards, service, and experience they are known for from location to location. Another challenge is maintaining brand standards when adapting to new areas where local requirements and customs may differ.

We wanted to gauge how marketers felt their businesses were doing in keeping on top of these common obstacles. We can see that, as with performance, marketing leaders generally reflect a positive sentiment toward their teams' capabilities, and there don't appear to be any glaring problem areas.

However, while **80%** of brands said their businesses were either "very good" or "good" at understanding ownership of marketing within organizations, we can see that **23%** felt that the ability to manage the adoption of marketing initiatives and streamline external communications was just "fair" or "poor". This suggests a potential breakdown between the communication and execution of some marketing as responsibilities fall to location levels.

It could also show that, although **82%** of our marketing decision-makers feel their organizations are "very good" or "good" at managing internal communications, the messages might not be being received or understood as well as they think further down the chain.

Legend: ■ Good/Very Good ■ Fair □ Poor

| Category	Good/Very Good	Fair	Poor
Consistent brand standards	85%	14%	1%
Understanding local area requirements	84%	12%	4%
Consistency of reputation	82%	16%	2%
Communicating internally	82%	15%	3%
Understanding marketing ownership	80%	17%	3%
Streamlining internal tools and processes	79%	19%	2%
Consistent marketing measurement	79%	18%	3%
Adoption of marketing initiatives	77%	19%	4%
Streamlining external communications	77%	19%	4%

(Axis: 0%, 20%, 40%, 60%, 80%, 100%)

HOW ARE MULTI-LOCATION BRANDS MANAGING LOCAL MARKETING ACTIVITIES?

How multi-location businesses execute marketing activities at regional or local levels may vary for many reasons, based on industry, differences in area requirements, or franchising requirements, for example. It's interesting to look broadly at how multi-location brands manage this, though.

What works for one business won't necessarily work for another, and we're not saying there is a correct answer. But it is worth considering that plenty of research around change management, business transformation, and product adoption shows that teams often react more positively to change, or are more willing to adopt new processes and initiatives if they feel they have some ownership of them.

45%
of multi-location brands use a hybrid approach of HQ-level marketing teams and branch-level local marketing.

Hybrid of HQ and branch-level — 45%

Centralized at HQ — 32%

Branch-level — 23%
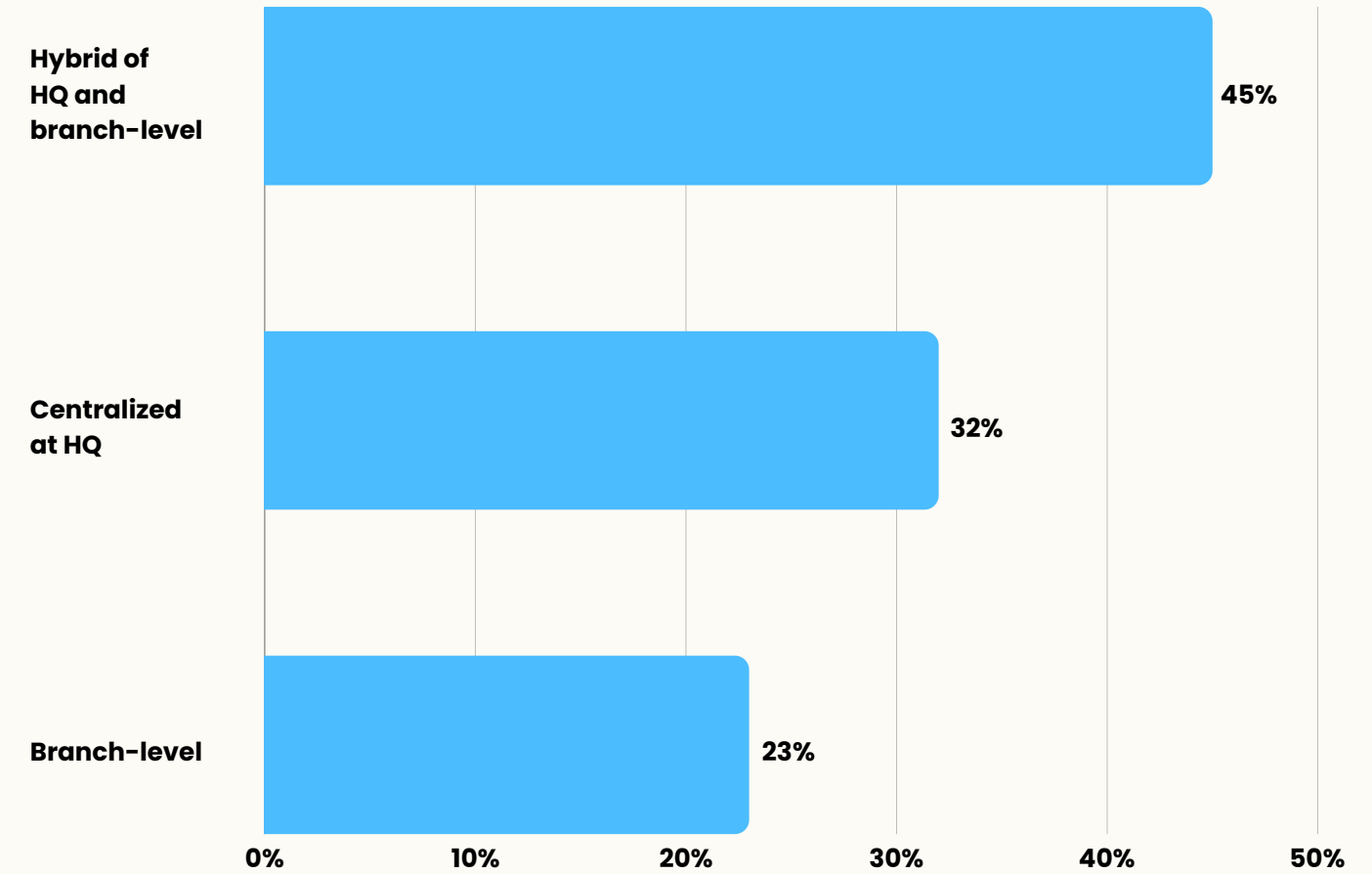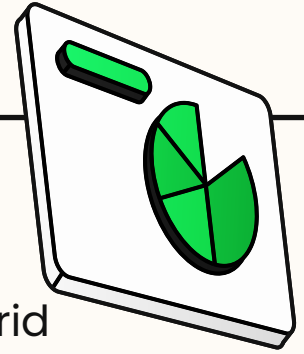
02
THE TRAITS OF A HIGH-PERFORMING MULTI-LOCATION BUSINESS

In this section, we'll take the brands who reported that their marketing performance "exceeded" expectations and use this group to create the benchmark for marketing performance.

Throughout the report, we'll refer to this group as '**High Performers**.' The remaining brands we compare against—those meeting expectations or falling short—we'll refer to as '**Average Performers**.'

It's worth noting that both groups contain respondents representing multi-location businesses of all sizes.
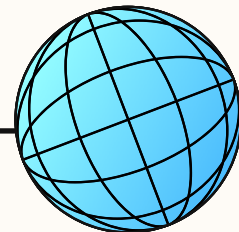
HIGH PERFORMERS
Brands who said their marketing performance '**exceeded**' expectations in 2023

AVERAGE PERFORMERS
Brands who said their marketing performance '**met**' or '**fell short of**' expectations in 2023

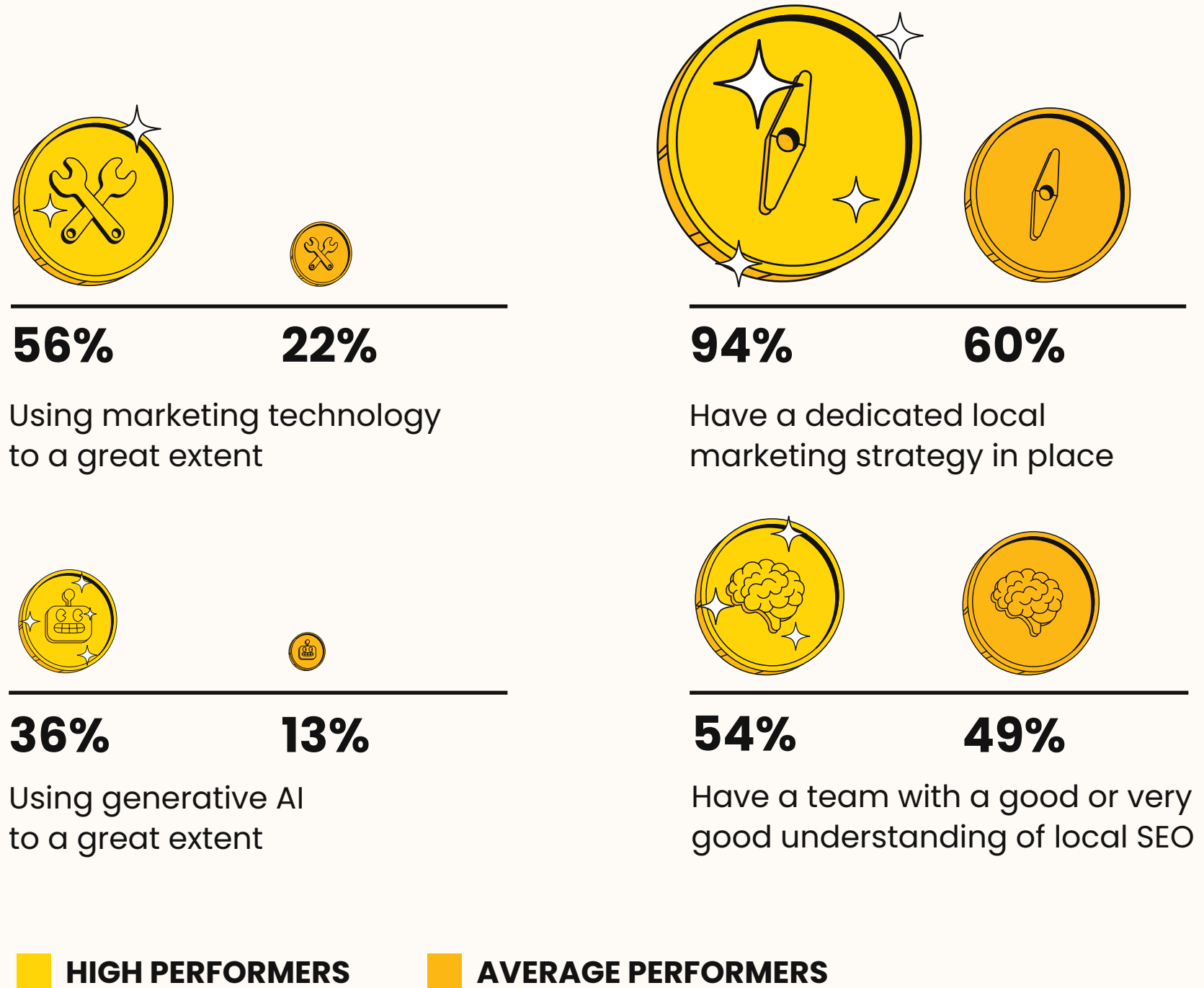# WHAT SETS HIGH PERFORMERS APART FROM AVERAGE PERFORMERS?

According to our research, the most successful multi-location businesses:

✧ Have dedicated local SEO strategies

✧ Have teams that understand the difference between traditional and local SEO

✧ Are using marketing technology to support their local marketing

✧ Prioritize improving customer retention and satisfaction

✧ Invest highly in social media

94%
Of high-performing multi-location businesses have a dedicated local marketing strategy in place, compared to **60%** of average-performing ones.

56%   **22%**
Using marketing technology to a great extent

36%   **13%**
Using generative AI to a great extent

94%   **60%**
Have a dedicated local marketing strategy in place

54%   **49%**
Have a team with a good or very good understanding of local SEO

🟨 **HIGH PERFORMERS**   🟧 **AVERAGE PERFORMERS**

WHAT MARKETING CHANNELS ARE HIGH-PERFORMING MULTI-LOCATION BUSINESSES INVESTING IN?

This chart highlights the investments High Performers make across their marketing mix. You'll notice a lot of green bars, which shows that High Performers are no slouches when it comes to putting their hands in their pockets and investing in various channels.

Organic social media stands out, with the most significant level of investment: **57%** of High Performers rated their investments in the channel as 'High.' Just **1%** said they do not invest in social media at all.
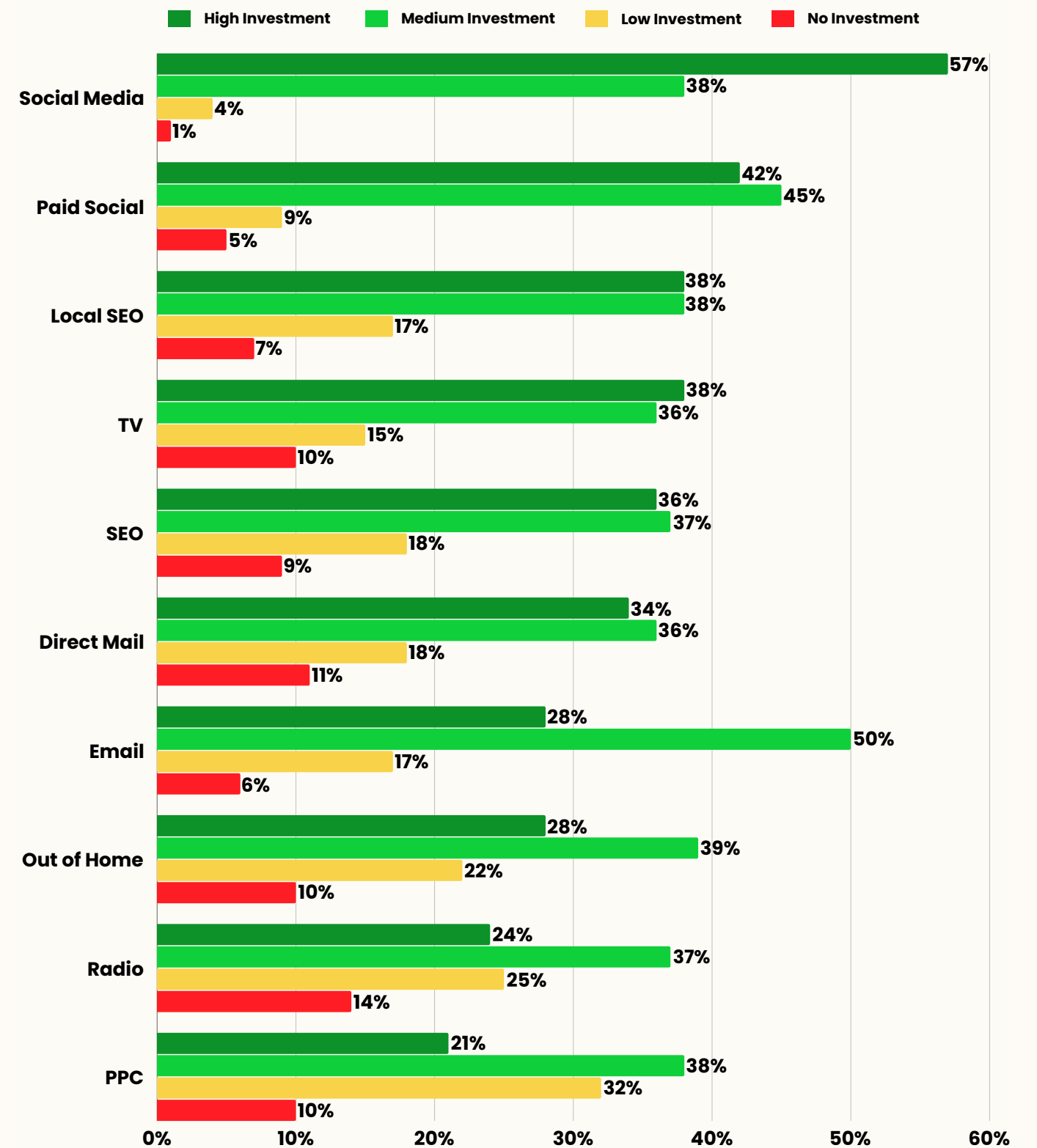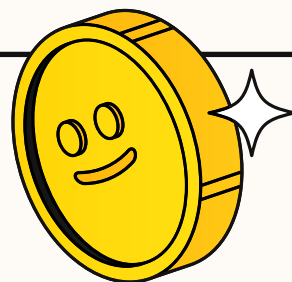
Behind organic social media, paid social is the second most invested in. Paid social is a popular choice for awareness and discovery campaigns to capture new audiences and entice customers away from competitors. These two channels being positioned at the top of the chart suggest that High Performers prioritize customer acquisition and retention equally.

Local SEO sees the third-highest level of investment from High Performers, with **76%** making medium-high investments in this area.

High Performers are much more likely than other businesses to have a dedicated local marketing or local SEO strategy in place, so it's clear that a confident understanding and investment in this area is paying off for them, and that local marketing is fundamental to overall marketing success.

95%
of high-performing multi-location businesses invest a "high" or "medium" amount in social media.

Legend: High Investment · Medium Investment · Low Investment · No Investment

Social Media
- High Investment: 57%
- Medium Investment: 38%
- Low Investment: 4%
- No Investment: 1%

Paid Social
- High Investment: 42%
- Medium Investment: 45%
- Low Investment: 9%
- No Investment: 5%

Local SEO
- High Investment: 38%
- Medium Investment: 38%
- Low Investment: 17%
- No Investment: 7%

TV
- High Investment: 38%
- Medium Investment: 36%
- Low Investment: 15%
- No Investment: 10%

SEO
- High Investment: 36%
- Medium Investment: 37%
- Low Investment: 18%
- No Investment: 9%

Direct Mail
- High Investment: 34%
- Medium Investment: 36%
- Low Investment: 18%
- No Investment: 11%

Email
- High Investment: 28%
- Medium Investment: 50%
- Low Investment: 17%
- No Investment: 6%

Out of Home
- High Investment: 28%
- Medium Investment: 39%
- Low Investment: 22%
- No Investment: 10%

Radio
- High Investment: 24%
- Medium Investment: 37%
- Low Investment: 25%
- No Investment: 14%

PPC
- High Investment: 21%
- Medium Investment: 38%
- Low Investment: 32%
- No Investment: 10%

HOW DO MULTI-LOCATION MARKETERS RATE THEIR TEAMS' UNDERSTANDING OF THE DIFFERENCE BETWEEN TRADITIONAL AND LOCAL SEO?

Knowledge is power, and so it goes that understanding the various differences between local and traditional SEO and acting upon them, will serve your business and team well in 2024.
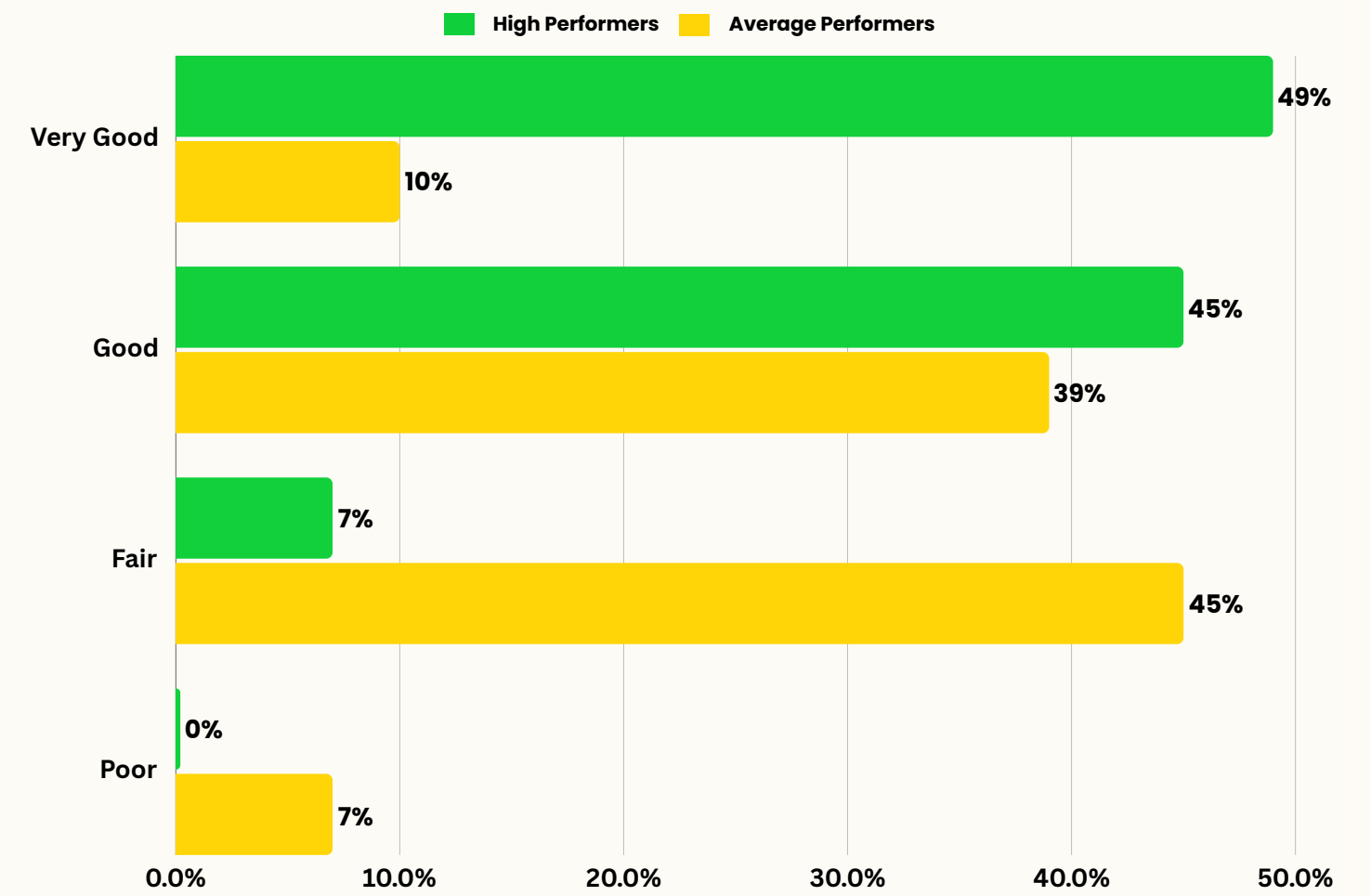
As you can see, high-performing multi-location businesses have teams that really understand these differences. **93%** of marketing teams in the High Performers group have a 'Good' or 'Very Good' understanding of the differences between traditional SEO and local SEO.

94%

of high-performing marketing teams have a 'good' or 'very good' understanding of the difference between traditional and local SEO.
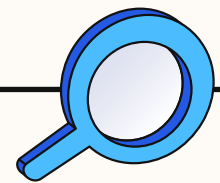
So… What Is the Difference Between Traditional and Local SEO?

✧ Local SEO and local search visibility revolve around rankings in Google's Local Pack, which runs on a completely different algorithm to the standard organic SERP

✧ Local SEO requires the management of Google Business Profiles and other directory listings

✧ Review management is a key part of local SEO, as it's theorized to be a local ranking factor

✧ The proximity of the searcher to the business location is a completely unique factor in rankings

High Performers | **Average Performers**

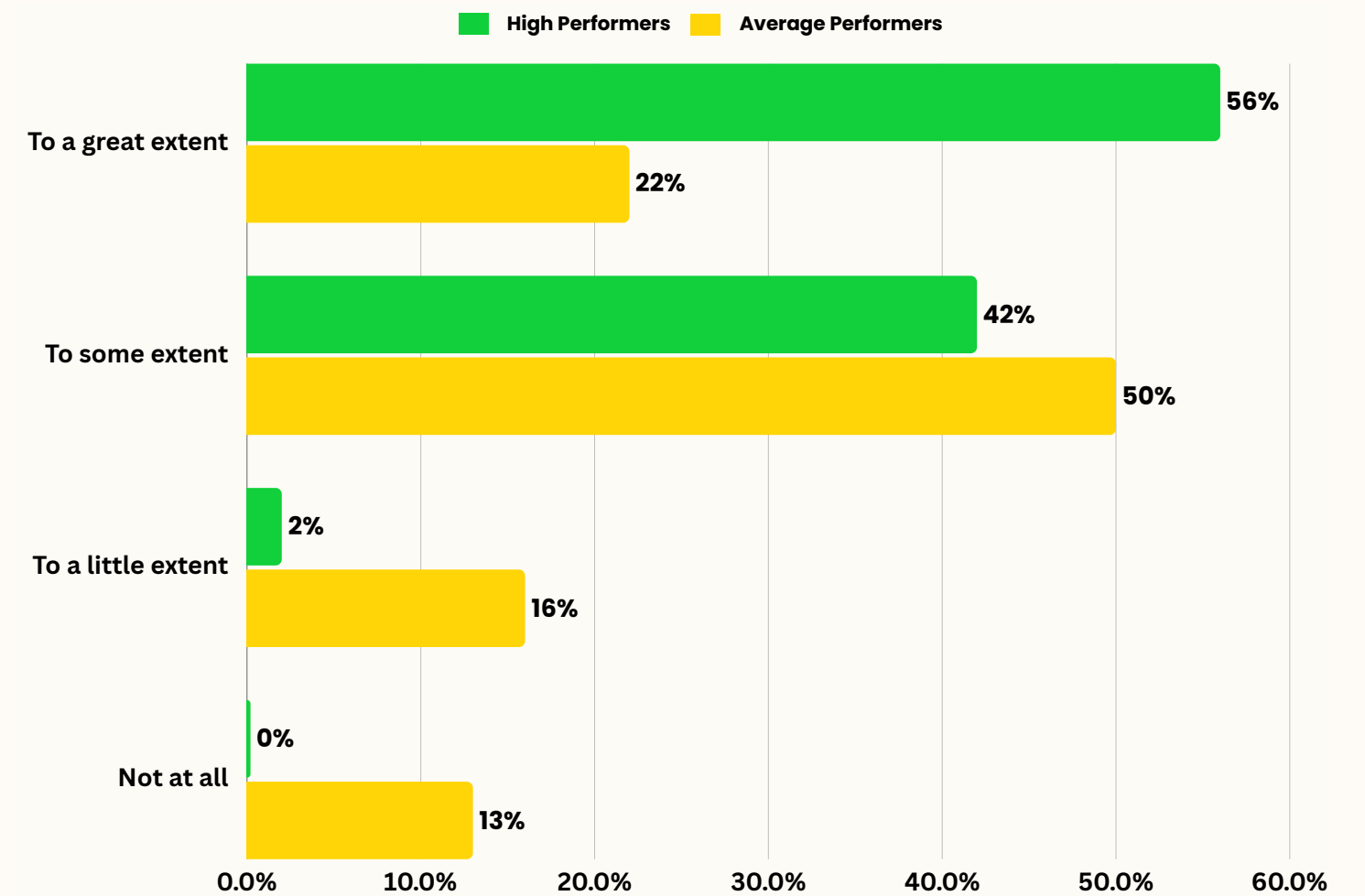| Rating	High Performers	Average Performers
Very Good	49%	10%
Good	45%	39%
Fair	7%	45%
Poor	0%	7%

HOW ARE HIGH-PERFORMING MULTI-LOCATION BRANDS USING MARKETING TECHNOLOGY TO SUPPORT LOCAL MARKETING?

From the data shown so far, we've seen that High Performers and Average Performers treat local SEO differently. Would things change when we asked about the use of technology in local SEO? Would this uncover some opportunities for Average Performers to take note of?

The chart opposite highlights that **100%** of High Performers use marketing technology to support their local strategies, with only **2%** saying they use it to "a little" extent. This is compared to **29%** of Average Performers using marketing technology to a "little" extent or not at all.

Only **22%** of Average Performers use marketing technology to a "great" extent, compared to **56%** of High Performers, suggesting that High Performers see a more significant benefit from their tools. This could be down to team capabilities and whether they have the knowledge or training to use certain tools or have more team resources dedicated to local marketing.

There is clearly an opportunity for underperforming businesses to identify how and where marketing tools can better support their local marketing functions— or where additional training is needed within teams.

High Performers **Average Performers**

Category	High Performers	Average Performers
To a great extent	56%	22%
To some extent	42%	50%
To a little extent	2%	16%
Not at all	0%	13%

98%

of High Performers use marketing technology "to some extent" or "to a great extent" to support local marketing.
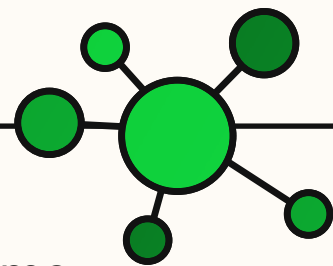
WHAT BUSINESS OUTCOMES ARE HIGH-PERFORMING MULTI-LOCATION MARKETING TEAMS WORKING TOWARDS?

We asked marketers what business outcomes their marketing activities are designed around. These core performance areas influence goal-setting (KPIs, OKRs, and similar frameworks) and determine what marketing teams focus on throughout the year.
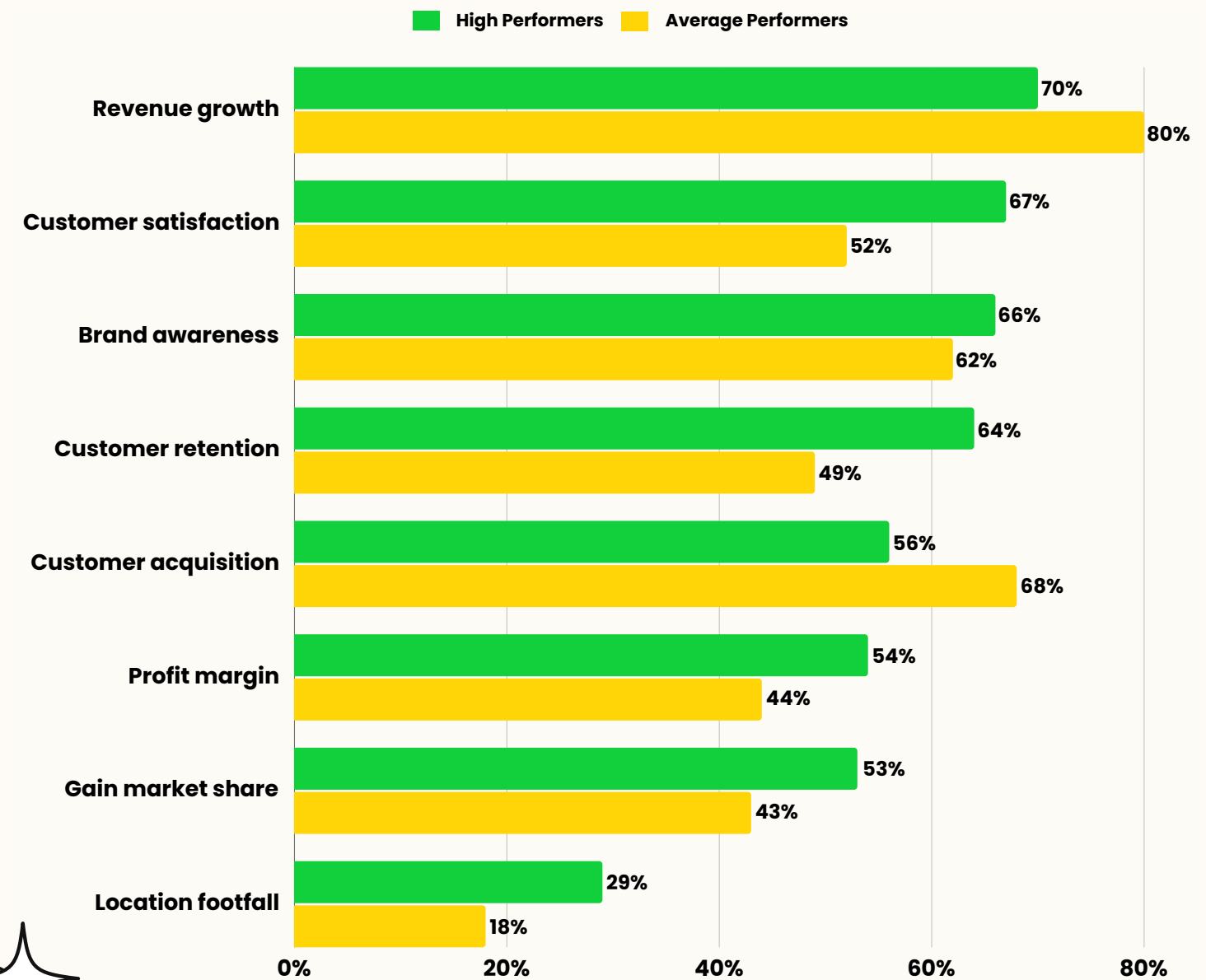
The results in the chart opposite reflect a more measured approach for the High Performers, with reasonably equal weighting across the business outcomes. This level only drops off as we come to location footfall, where fewer than one-third of High Performers have said they're focusing marketing efforts here.

For the Average Performers, however, there are two stand-outs: revenue growth (**80%**) and customer acquisition (**68%**).

It would be surprising for businesses not to rely on marketing to support revenue growth. Still, it's interesting to see customer satisfaction (**52%**) and customer retention (**49%**) take more of a back seat for Average Performers.

Much research shows that your existing customers are better for your bottom line. Focusing on nurturing a loyal customer base can yield more impressive profits. According to Bain and Co.[1], increasing customer retention by **5%** can lead to a **25%** profit increase. Meanwhile, evidence also suggests that acquiring a new customer can be up to 25 times more[2] expensive than retaining an existing customer.

So, while focusing on attracting new customers is good for revenue growth, it's important to consider how marketing teams can contribute to the shared responsibility of customer satisfaction.

High Performers **Average Performers**

Outcome	High Performers	Average Performers
Revenue growth	70%	80%
Customer satisfaction	67%	52%
Brand awareness	66%	62%
Customer retention	64%	49%
Customer acquisition	56%	68%
Profit margin	54%	44%
Gain market share	53%	43%
Location footfall	29%	18%

1. https://media.bain.com/Images/BB_Prescription_cutting_costs.pdf
2. https://hbr.org/2014/10/the-value-of-keeping-the-right-customers

WHAT ARE HIGH-PERFORMING MULTI-LOCATION BUSINESSES' TOP PRIORITIES FOR 2024?

Comparing data on this page with the chart prior, we can see that High Performers prioritize things with a measured approach that aligns with their core marketing outcomes.

We see a continued commitment to strengthening existing customer relationships and building brand loyalty—and plans to increase locations (**38%**) and acquire new customers (**35%**).
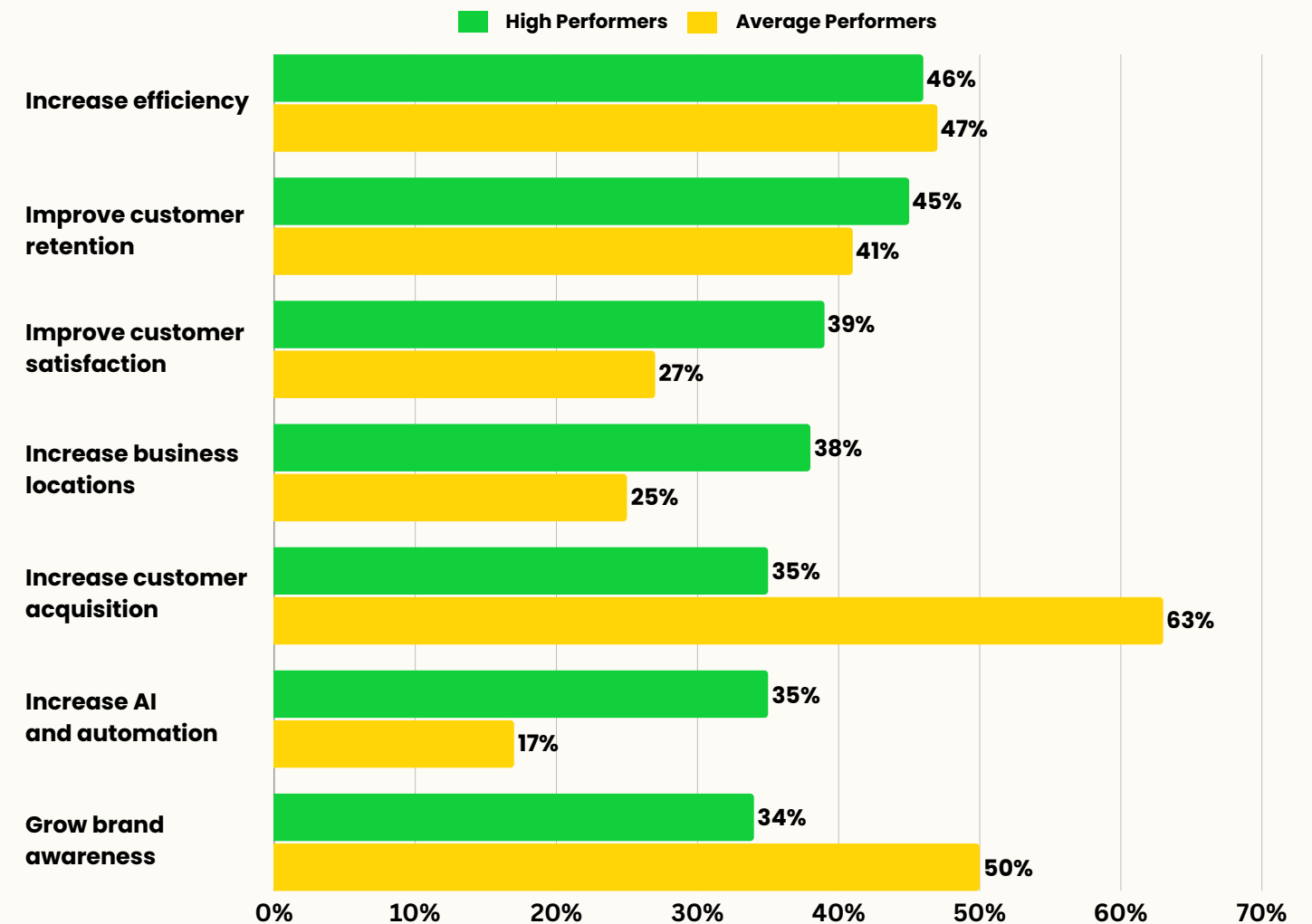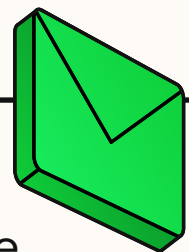
The data from Average Performers, on the other hand, tells a markedly different story. Customer acquisition sits at the top of their 2024 priorities (**63%**), followed by increasing brand awareness (**50%**) and increasing overall efficiency (**47%**).

Considering the Average Performers have reported only just meeting performance expectations—or even falling short—and are also looking to increase efficiency in 2024, you'd hope to see a more balanced

approach in their priorities. Customer acquisition sitting squarely ahead of other key priorities, like improving customer satisfaction, suggests a misunderstanding of what it takes to achieve business (and revenue) growth.

As we've touched on, customer satisfaction and retention can be significantly more cost-efficient for brands. But from a reputation perspective, we mustn't underestimate the sheer power of brand loyalty here, too. While your existing customers are often happier to try your new products[1] and services, you should also consider how a base of loyal customers can lead to brand awareness via their advocacy.

39%
of High Performers are prioritizing customer satisfaction in 2024, compared to **27%** of Average Performers.

High Performers **Average Performers**

Priority	High Performers	Average Performers
Increase efficiency	46%	47%
Improve customer retention	45%	41%
Improve customer satisfaction	39%	27%
Increase business locations	38%	25%
Increase customer acquisition	35%	63%
Increase AI and automation	35%	17%
Grow brand awareness	34%	50%

1. https://www.forbes.com/sites/forbesbusinesscouncil/2022/12/12/customer-retention-versus-customer-acquisition/?sh=6e6681011c7d

WHAT LOCAL MARKETING TACTICS ARE HIGH-PERFORMING MULTI-LOCATION BUSINESSES USING?

Similar proportions of High Performers and Average Performers use social media, paid advertising, and local content as local marketing tactics.

The key areas where the High Performers are focusing more are video, local rankings optimization, reputation management, and local citations. However, the local marketing tactic that Average Performers rely on significantly more than High Performers is outreach (**59%** vs. **46%**). This finding, and their focus on customer acquisition above all else, suggests that Average Performers have been over-reliant on outreach marketing to fulfill this goal.

Video marketing can be tricky to implement if the budget and talent are hard to find, but it's clearly an area that High Performers are taking advantage of more than Average Performers. If you're reading this and your brand isn't currently working on video, it's worth considering

where you can start. Could you take a handful of your locations as a test and see what results it yields?

While video sits much more in brand awareness and engagement, the remaining three tactics that High Performers use more than Average Performers (local rankings optimization, reputation management, and citations) are fundamental to ensuring visibility in the right places, so that the right people can find you with the search terms you want to be found for.
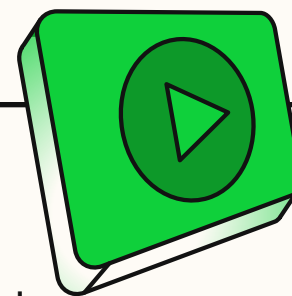
63%
of High Performers use video as a local marketing tactic, compared to just **38%** of Average Performers.

Legend: ■ High Performers ■ Average Performers

Tactic	High Performers	Average Performers
Social Media	81%	80%
Email	69%	67%
Paid Ads	69%	66%
Video	63%	38%
Local Content	47%	42%
Local Rankings Optimization	46%	27%
Outreach	46%	59%
Reputation Management	46%	30%
Citations Management	29%	16%
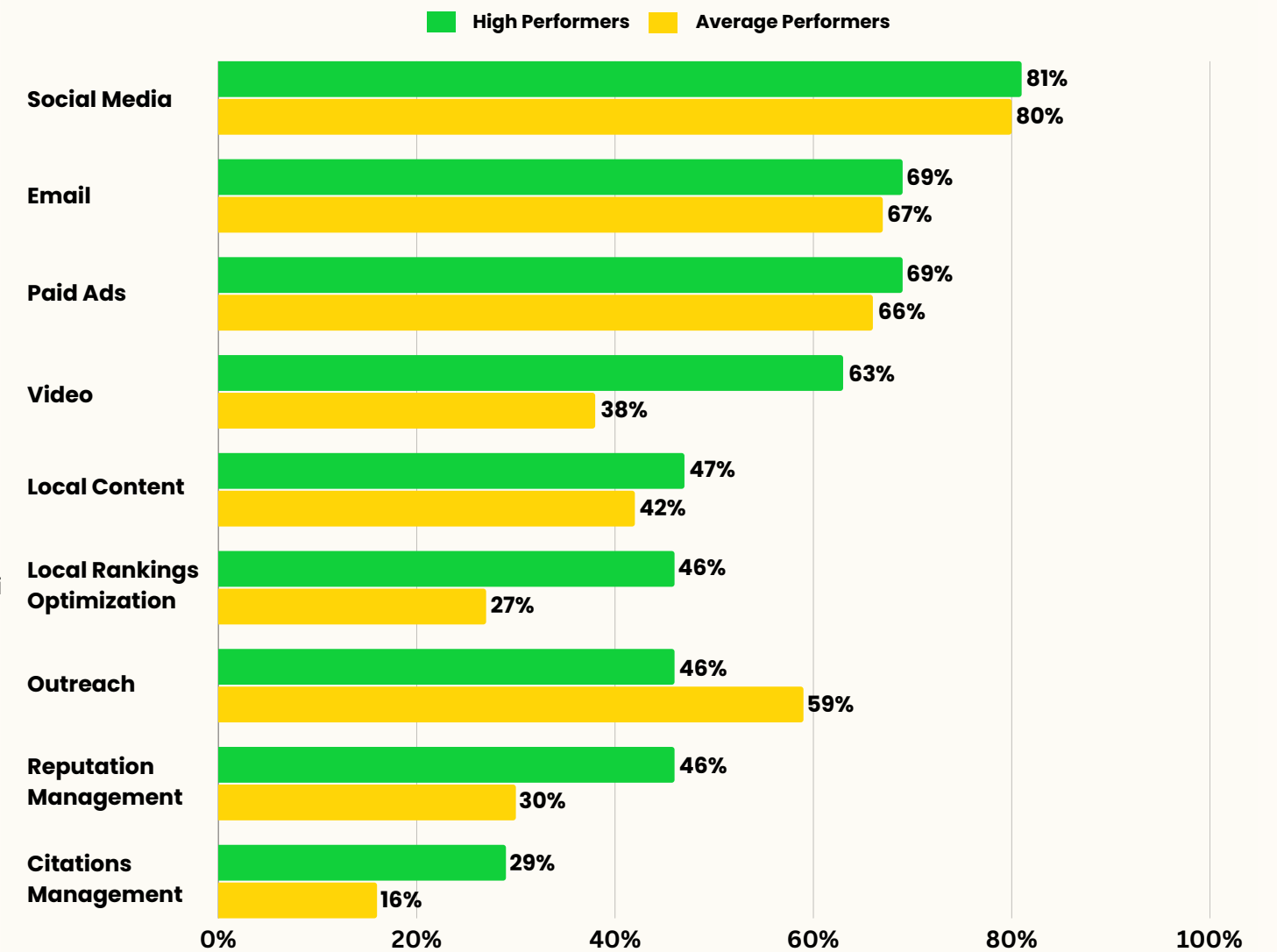
03
COMPARING MULTI-LOCATION STRATEGIES BY BUSINESS SIZE

Challenges, tactics, and strategies all change with scale. The more locations you work with, the more complex the marketing will be.

Now that we've looked at what marked High Performers out against the rest of the pack, let's take a look at how multi-location businesses of different sizes compare.

To the right, you can see how we'll be defining and comparing businesses of different sizes in this section of the report.

BIG BRANDS

Brands with
101 + locations

REGIONAL CHALLENGERS

Brands with
51–100 locations

LOCAL PLAYERS

Brands with
11–50 locations

BUSINESS SIZE BREAKDOWN: WHAT BUSINESS OBJECTIVES ARE MARKETING TEAMS WORKING TOWARDS?

Much like the High Performers, Big Brands appear to consistently distribute their business priorities evenly. The two lowest priorities, where the percentages drop more, are profit margin and location footfall.
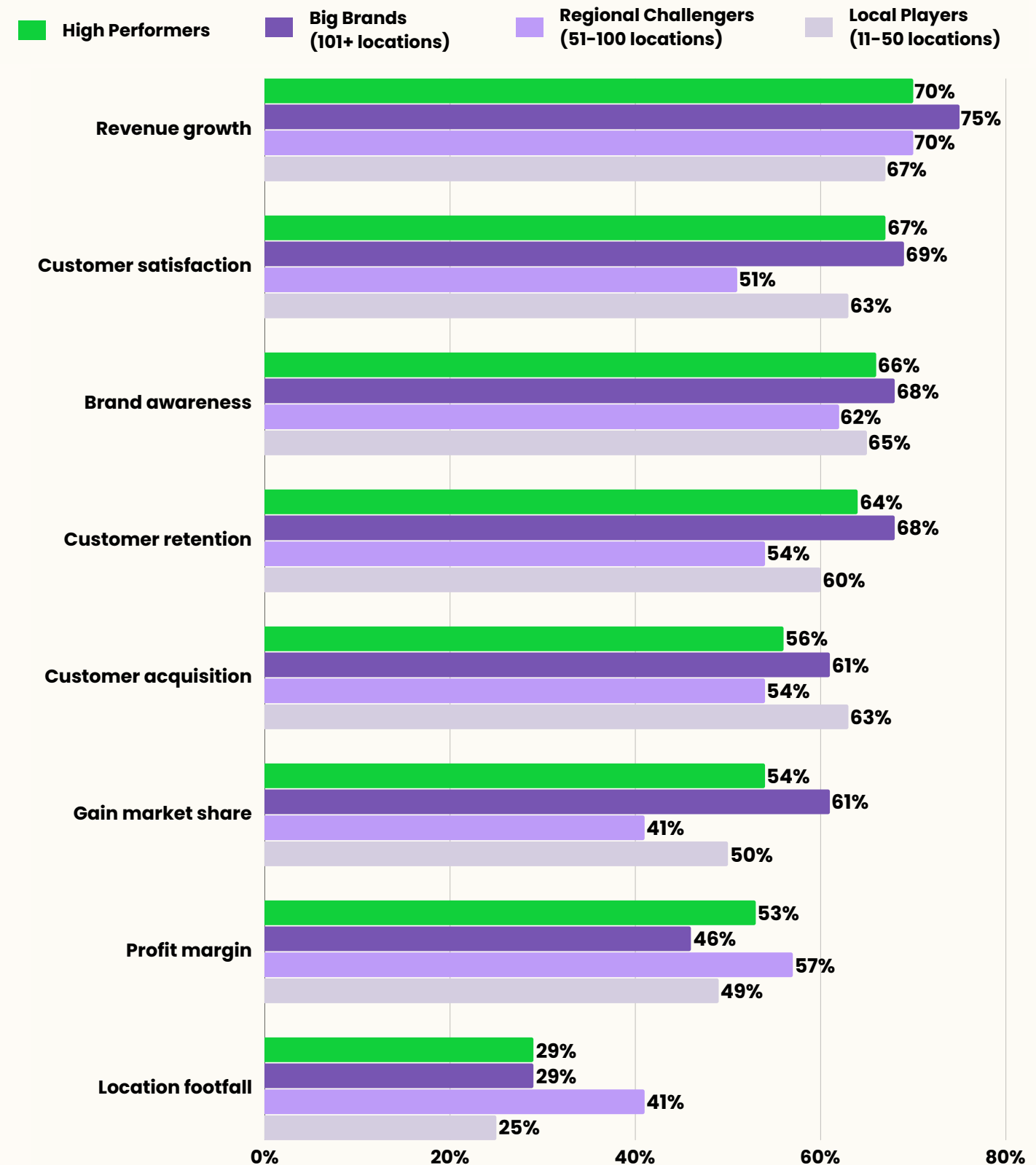
However, the biggest gaps between the groups appear to concern the Regional Challengers. **51%** of Regional Challengers said their marketing activities focus on customer satisfaction, compared to the High Performers benchmark level of **67%**. The next biggest gaps appear in gaining market share (**41%** against the High Performers benchmark of **54%**) and customer retention (**54%** compared to the High Performer benchmark of **64%**).

If your brand falls within the Regional Challengers group, you might see this as a chance to review your current marketing output. Are there some missed opportunities around these areas?

As we've already found, a relationship exists between underperforming brands and their prioritization in attaining new business over satisfying existing customers. It looks like Regional Challengers are following a similar pattern.

Another interesting difference is how Regional Challengers appear to focus on specific location footfall over the other groups. Again, it does suggest a 'quantity over quality' imbalance. Are Regional Challengers focusing too much on increasing feet through the door when they could be increasing the average basket spend, for example?

Only **46%** of Big Brands prioritize profit margin—the least out of all business sizes.

Legend:
- High Performers
- Big Brands (101+ locations)
- Regional Challengers (51–100 locations)
- Local Players (11–50 locations)

Revenue growth
- High Performers: 70%
- Big Brands: 75%
- Regional Challengers: 70%
- Local Players: 67%

Customer satisfaction
- High Performers: 67%
- Big Brands: 69%
- Regional Challengers: 51%
- Local Players: 63%

Brand awareness
- High Performers: 66%
- Big Brands: 68%
- Regional Challengers: 62%
- Local Players: 65%

Customer retention
- High Performers: 64%
- Big Brands: 68%
- Regional Challengers: 54%
- Local Players: 60%

Customer acquisition
- High Performers: 56%
- Big Brands: 61%
- Regional Challengers: 54%
- Local Players: 63%

Gain market share
- High Performers: 54%
- Big Brands: 61%
- Regional Challengers: 41%
- Local Players: 50%

Profit margin
- High Performers: 53%
- Big Brands: 46%
- Regional Challengers: 57%
- Local Players: 49%

Location footfall
- High Performers: 29%
- Big Brands: 29%
- Regional Challengers: 41%
- Local Players: 25%

BUSINESS SIZE BREAKDOWN: WHAT ARE MULTI-LOCATION BUSINESSES' TOP PRIORITIES FOR 2024?

We can see some interesting differences between the groups when looking at the different sizes of multi-location businesses and their priorities.

Firstly, the Local Players, Regional Challengers, and Big Brands are generally far behind the High Performers benchmark with customer retention. It's a theme that keeps cropping up and provides all the more reason for multi-location businesses of all sizes to pay attention to this area.
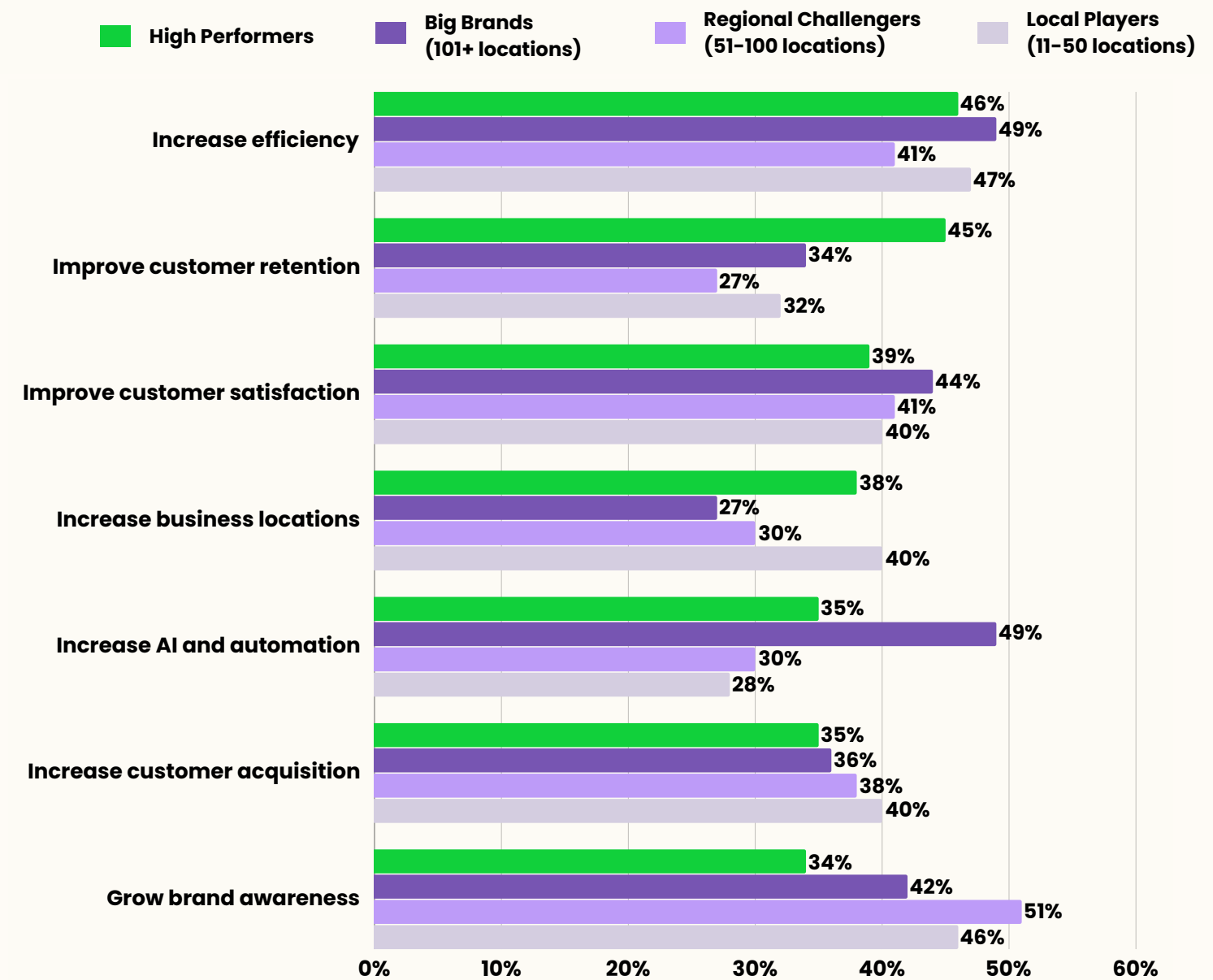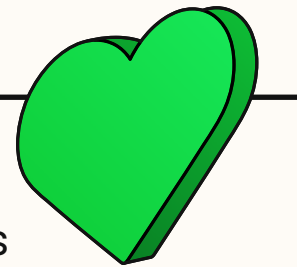
You'll notice that nearly half of our Big Brand respondents (**49%**) have highlighted AI and automation as a focus area for 2024.

Artificial Intelligence in itself is not a new concept. However, the constant—and very newsworthy—developments in generative AI throughout 2023 have put the words into every marketer's mouth.

Since the boom of generative AI, larger brands and market leaders will likely face higher pressure to adopt new AI-driven technologies than smaller-sized organizations. There is somewhat of an expectation to "keep up" with the others in the big leagues.

Retail, hospitality, and entertainment are obvious examples of where you might expect to see this in the mainstream. Many brands are implementing generative AI in digital environments1 to aid customer experiences. Will we start to see this in physical environments, too?

45%

of High Performers will prioritize customer retention in 2024—far more than reported by individual business sizes.

Legend
- **High Performers**
- **Big Brands (101+ locations)**
- **Regional Challengers (51-100 locations)**
- **Local Players (11-50 locations)**

Increase efficiency
- High Performers: 46%
- Big Brands: 49%
- Regional Challengers: 41%
- Local Players: 47%

Improve customer retention
- High Performers: 45%
- Big Brands: 34%
- Regional Challengers: 27%
- Local Players: 32%

Improve customer satisfaction
- High Performers: 39%
- Big Brands: 44%
- Regional Challengers: 41%
- Local Players: 40%

Increase business locations
- High Performers: 38%
- Big Brands: 27%
- Regional Challengers: 30%
- Local Players: 40%

Increase AI and automation
- High Performers: 35%
- Big Brands: 49%
- Regional Challengers: 30%
- Local Players: 28%

Increase customer acquisition
- High Performers: 35%
- Big Brands: 36%
- Regional Challengers: 38%
- Local Players: 40%

Grow brand awareness
- High Performers: 34%
- Big Brands: 42%
- Regional Challengers: 51%
- Local Players: 46%

BUSINESS SIZE BREAKDOWN: WHAT ARE THE BIGGEST CHALLENGES FOR MULTI-LOCATION BUSINESSES IN 2024?

We asked marketers about their top three challenges for the year ahead, and the groups have some notable differences.

As we've seen with Big Brands prioritizing AI in 2024, it's a no-brainer that they've also placed emerging technology as one of the biggest challenges for this year. Their top challenge, however, is increasing labor costs, with **42%** of this group agreeing that this is one of the biggest current issues. Without getting too conspiratorial, *is one of these challenges seen as an opportunity to resolve the other?*
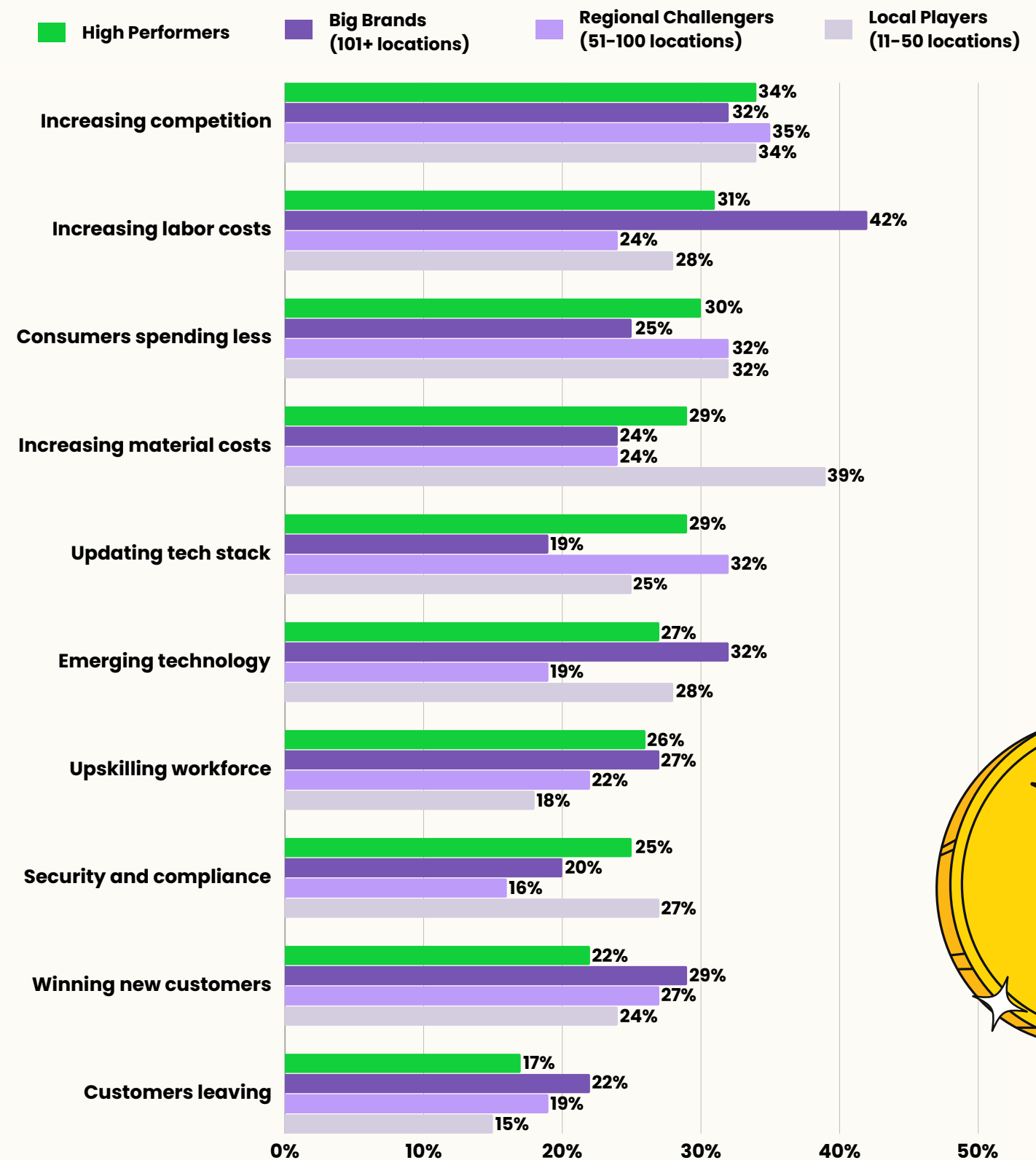
It's worth looking further at the responses around technology here: compared to the **42%** of Big Brands, only **19%** of Regional Challengers are worried about emerging technology in 2024. Yet when it comes to updating their existing tech stacks, **32%** of Regional Challengers see this as a big

challenge for 2024. This is higher than Big Brands (**19%**), Local Players (**25%**), and the High Performers benchmark of **29%**.

What could this suggest? Perhaps Big Brands don't view their tech stack as a problem, or maybe their focus is slightly clouded by the generative AI race.

We can see that Regional Challengers aren't currently getting the most out of their tech stacks, and may seek to update these in 2024.

Meanwhile, Local Players see increasing material costs as their biggest challenge in 2024. It makes sense, as smaller brands may have less bargaining power in the buying market and will likely feel the squeeze of increasing costs more than larger competitors.

Legend:
- High Performers
- Big Brands (101+ locations)
- Regional Challengers (51-100 locations)
- Local Players (11-50 locations)

Challenge	High Performers	Big Brands (101+ locations)	Regional Challengers (51-100 locations)	Local Players (11-50 locations)
Increasing competition	34%	32%	35%	34%
Increasing labor costs	31%	42%	24%	28%
Consumers spending less	30%	25%	32%	32%
Increasing material costs	29%	24%	24%	39%
Updating tech stack	29%	19%	32%	25%
Emerging technology	27%	32%	19%	28%
Upskilling workforce	26%	27%	22%	18%
Security and compliance	25%	20%	16%	27%
Winning new customers	22%	29%	27%	24%
Customers leaving	17%	22%	19%	15%

BUSINESS SIZE BREAKDOWN: WHICH LOCAL MARKETING TACTICS ARE MULTI-LOCATION BUSINESSES USING?

Comparing local marketing tactics by business size, we can see that Big Brands broadly follow the High Performers benchmark by investing in a wide range of tactics rather than a select few.

Citations and business listings are important for brands of all sizes to ensure that business information is consistent and uniform online. This challenge only gets greater for Big Brands, as having hundreds or even thousands of locations to update and maintain becomes more difficult and time-consuming.
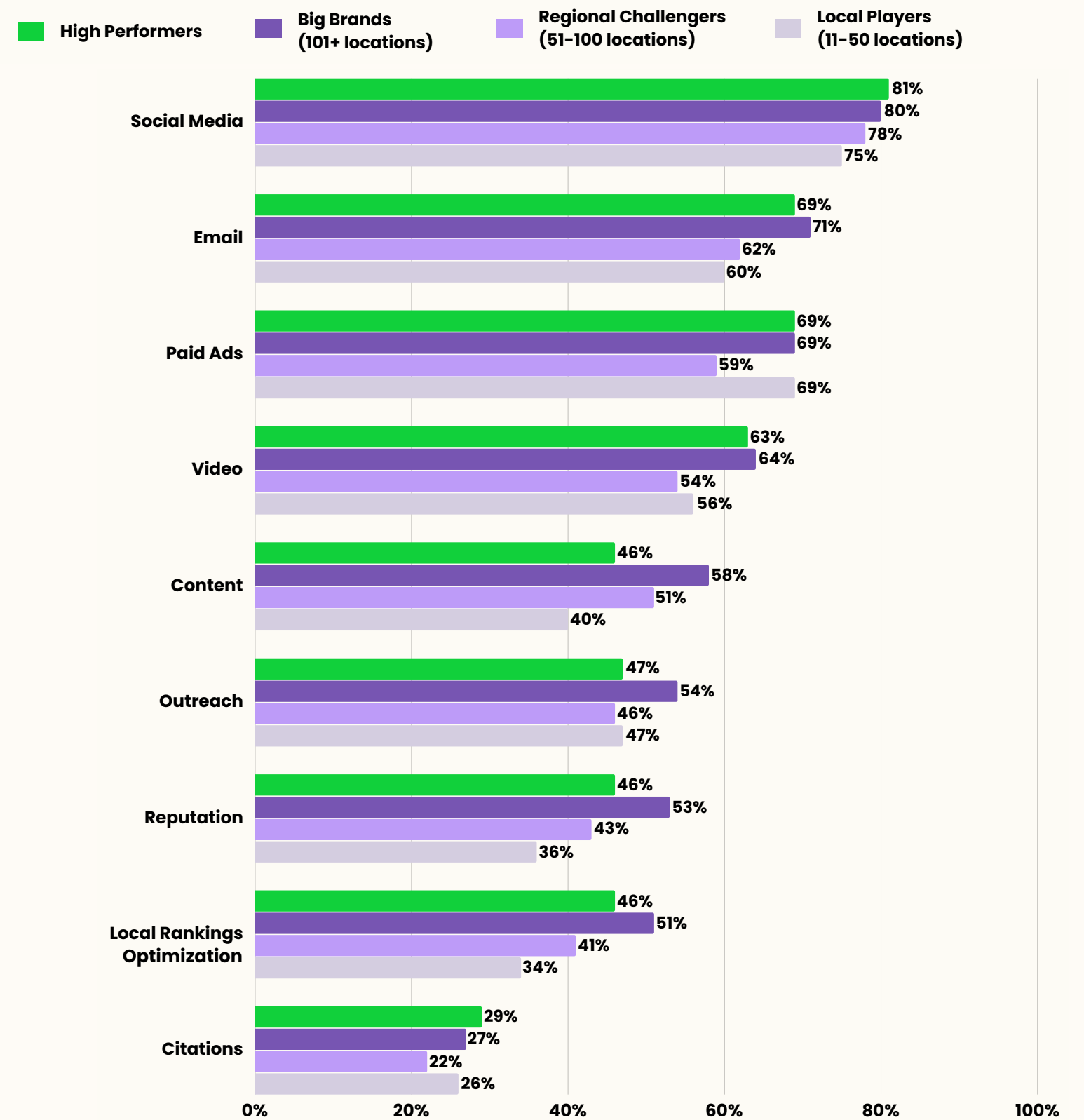
Social media is the most-used local marketing tactic for multi-location businesses of all sizes.

There are some tactics that Big Brands appear to be investing in more than High Performers, which could suggest that they are spending too much time (or money) in some areas. The most notable example of this is local-specific content (**58%** vs. **46%** for High Performers).

Too much content can be problematic, particularly if it confuses or cannibalizes your SEO efforts or jeopardizes your user experience. This could even be a legacy issue as SEO best practices have evolved.

We can see that Regional Challengers appear to be using social media, email marketing, and paid advertising the most as local marketing tactics. Against the High Performers benchmark, the gaps that highlight some potential opportunities for them are video, local rankings, citations, and reputation management.

Legend:
- High Performers
- Big Brands (101+ locations)
- Regional Challengers (51-100 locations)
- Local Players (11–50 locations)

Social Media
- High Performers: 81%
- Big Brands: 80%
- Regional Challengers: 78%
- Local Players: 75%

Email
- High Performers: 69%
- Big Brands: 71%
- Regional Challengers: 62%
- Local Players: 60%

Paid Ads
- High Performers: 69%
- Big Brands: 69%
- Regional Challengers: 59%
- Local Players: 69%

Video
- High Performers: 63%
- Big Brands: 64%
- Regional Challengers: 54%
- Local Players: 56%

Content
- High Performers: 46%
- Big Brands: 58%
- Regional Challengers: 51%
- Local Players: 40%

Outreach
- High Performers: 47%
- Big Brands: 54%
- Regional Challengers: 46%
- Local Players: 47%

Reputation
- High Performers: 46%
- Big Brands: 53%
- Regional Challengers: 43%
- Local Players: 36%

Local Rankings Optimization
- High Performers: 46%
- Big Brands: 51%
- Regional Challengers: 41%
- Local Players: 34%

Citations
- High Performers: 29%
- Big Brands: 27%
- Regional Challengers: 22%
- Local Players: 26%

04

GENERATIVE AI AND MULTI-LOCATION MARKETING

Despite only hitting the mainstream at the start of 2023, generative artificial intelligence has already caused a dramatic influx of new AI-assisted tools for both business and consumer audiences.

We've already seen that emerging technology and updating tech stacks are not-insignificant challenges for High Performers. So, with the following questions, we wanted to know to what extent generative AI is now used at the multi-location scale.

HOW ARE MULTI-LOCATION BUSINESSES USING GENERATIVE AI WITHIN THEIR ORGANIZATIONS?

As we'll see in the chart on the following page, the potential uses of generative AI are many and varied, from data analysis and forecasting to content creation and lead generation. Things have certainly moved on from users marveling at ChatGPT early in 2023. Now every marketing technology provider under the sun is using this game-changing technology to keep their products ahead of the game.

Generative AI can save time, it can inspire ideas, and it can cut out the grunt work— likely good news to the respondents who cited rising labor costs as a challenge in 2024. But how many multi-location businesses are already using generative AI and how many have yet to answer the call?

We asked a series of questions about generative AI, and the first revealed that **70%** of marketers state that generative AI is used "to some extent" or "to a great extent," suggesting that the technology has already made waves within these organizations.

88%
of multi-location businesses are using generative AI in some way.

	To a great extent	To some extent	To a little extent	Not at all	Unknown
	28%	42%	19%	11%	1%
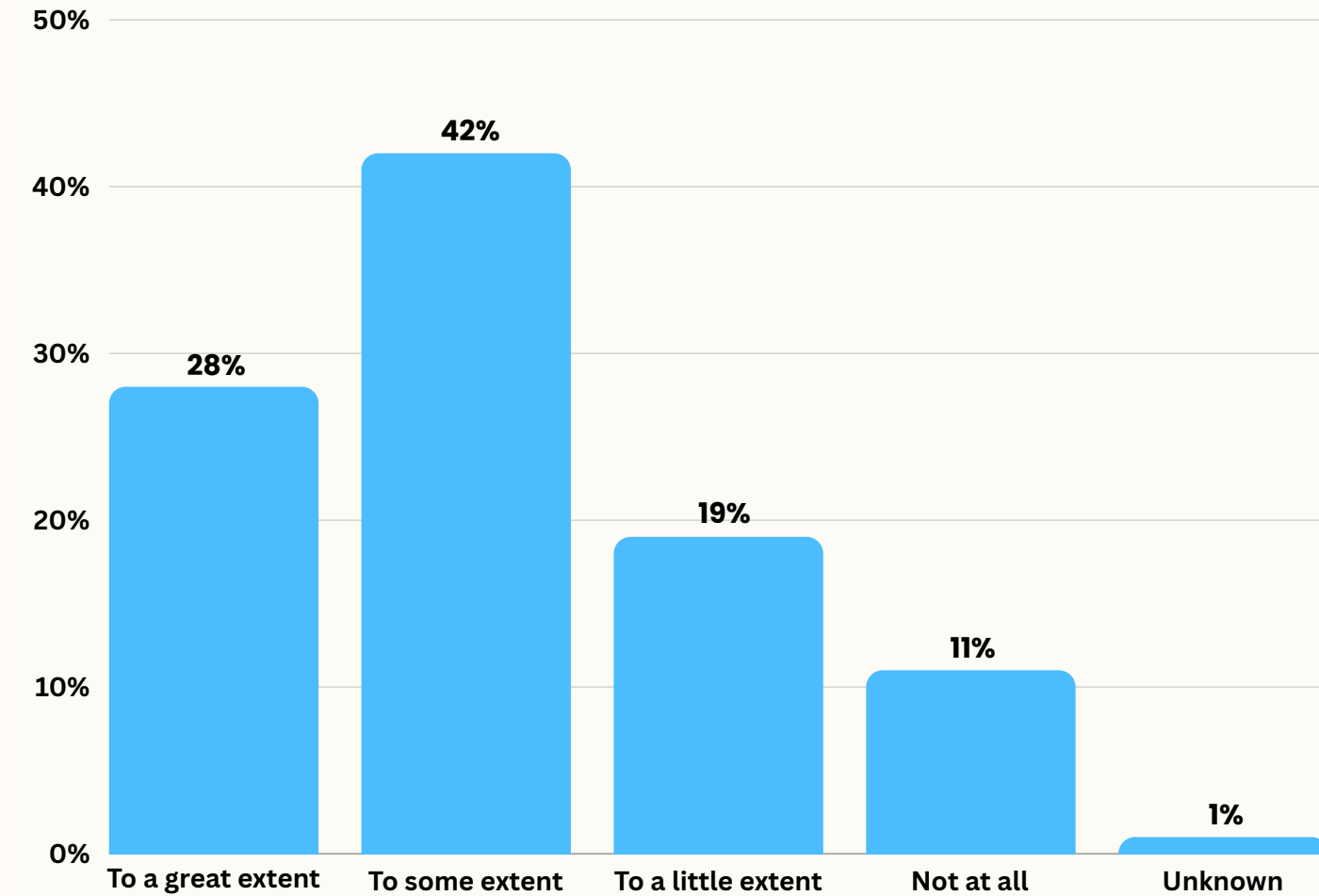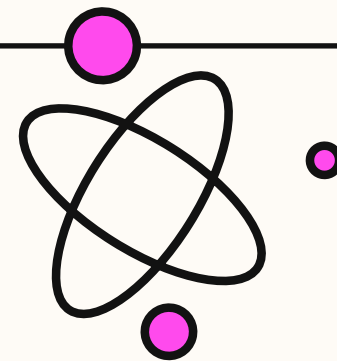
WHICH AREAS DO MULTI-LOCATION MARKETERS FEEL THAT GENERATIVE AI CAN HAVE THE BIGGEST IMPACT?
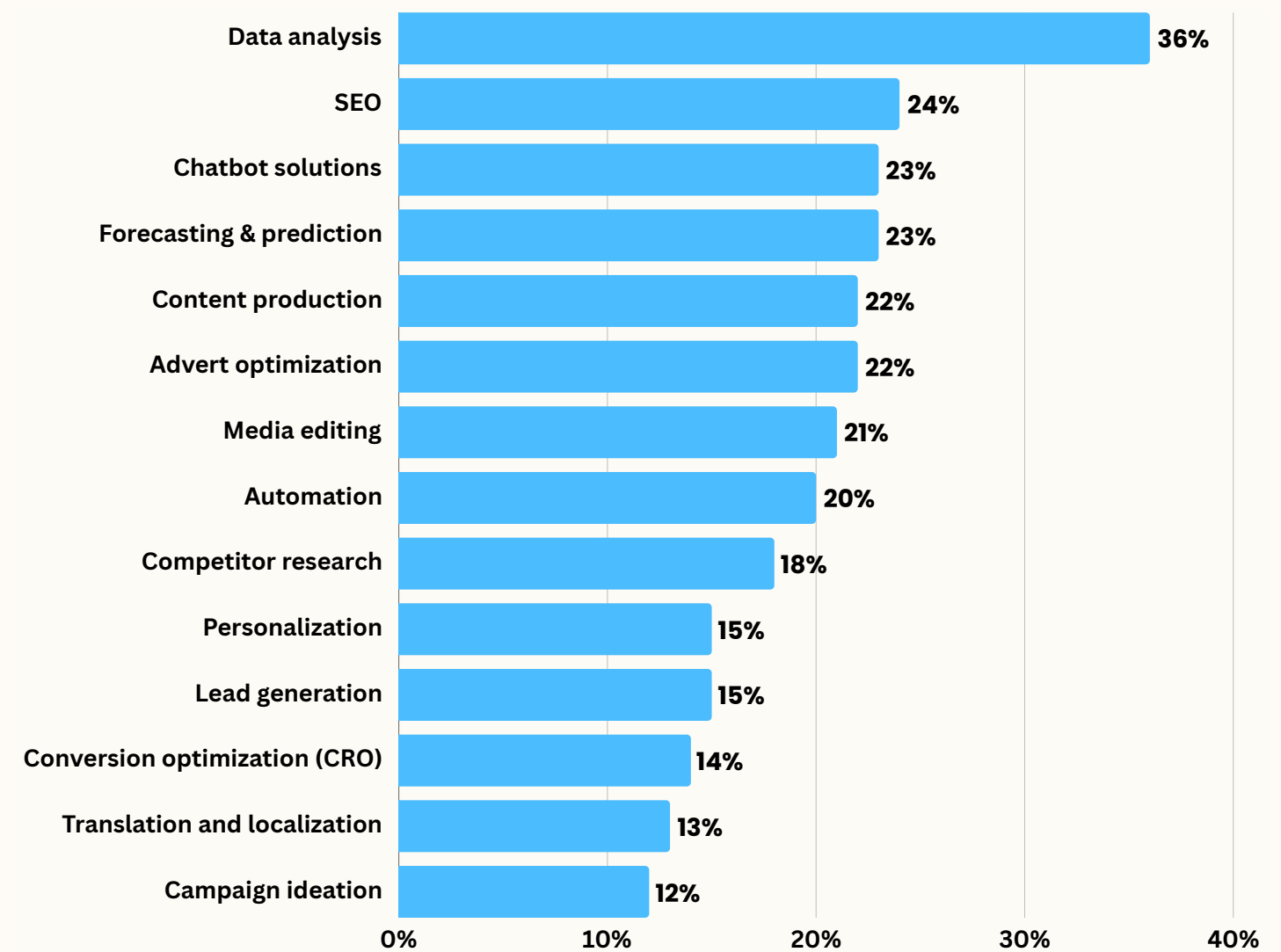
Where do multi-location see the biggest opportunities with the continually evolving tech? We asked marketers to select up to three areas.

It looks like marketers are looking for assistance with more technical endeavors than creative ones. **36%** of marketers highlighted data analysis as an area that generative AI can impact the most, while **24%** highlighted SEO, and **23%** cited forecasting and prediction.

While it's easy to first think of generative AI's capabilities to create new, original media, there are a whole host of generative AI tools in the market specifically designed to assist with—and speed up—data analytics. Creating engaging data visuals and summarizing vast amounts of data to provide impactful insights are just two use cases for such tools.

However, that's not to say that 'data analytics' can't lend itself to other areas, like personalization, to create unique experiences. Think about personalized menu recommendations for restaurants, virtual 'try-on' experiences in retail outlets, or custom fitness profiles in gyms and health centers. This term also encompasses 'forecasting and prediction', of which data analysis is at the very heart.

As the technology continues to evolve, though, there's no doubt we'll see opportunities and use cases for all industries unfolding.
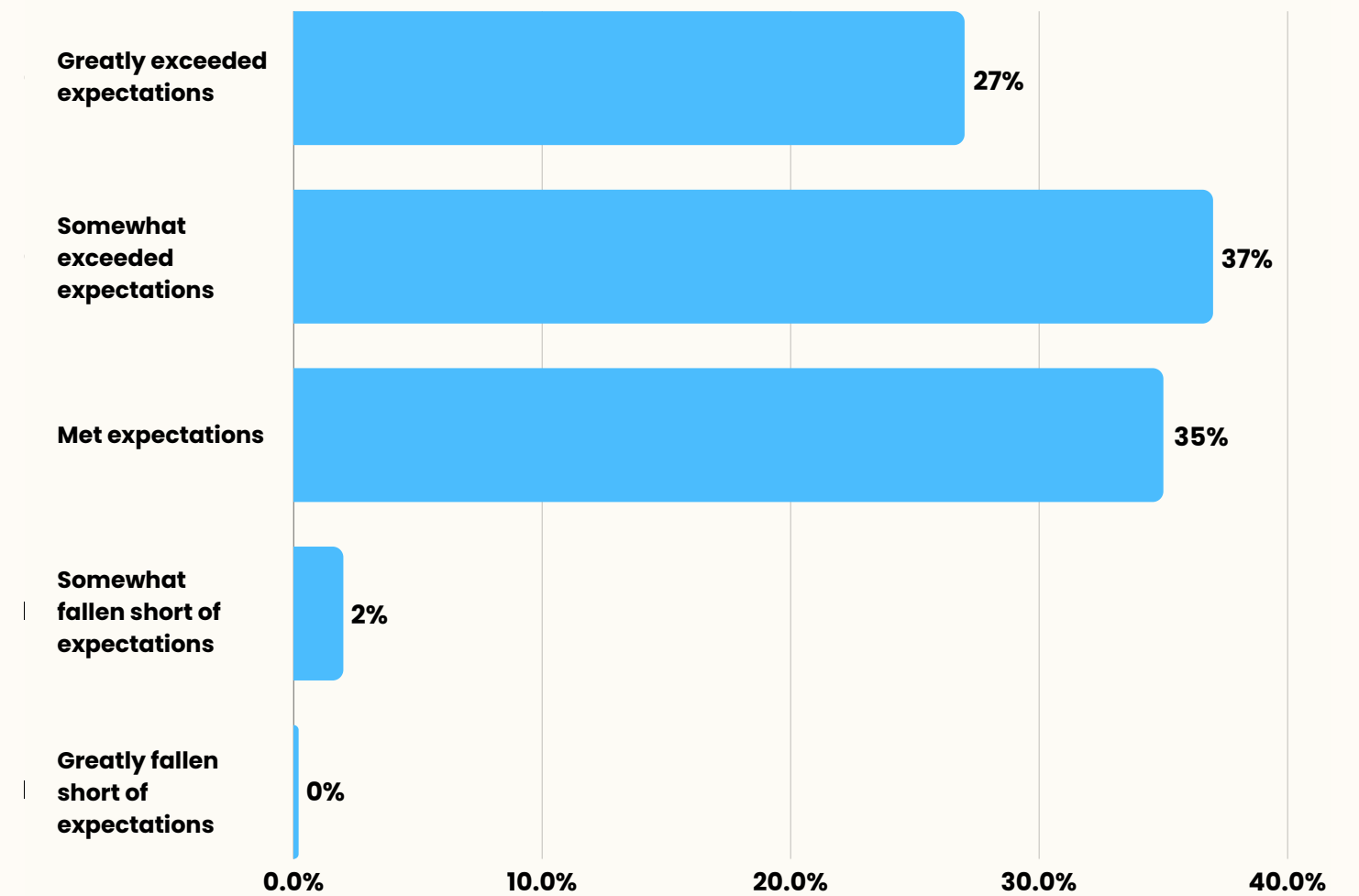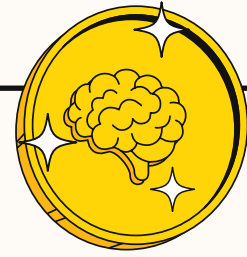
Chart: Areas generative AI can have the biggest impact (percentage of marketers):

Area	Percentage
Data analysis	36%
SEO	24%
Chatbot solutions	23%
Forecasting & prediction	23%
Content production	22%
Advert optimization	22%
Media editing	21%
Automation	20%
Competitor research	18%
Personalization	15%
Lead generation	15%
Conversion optimization (CRO)	14%
Translation and localization	13%
Campaign ideation	12%

HOW DO MULTI-LOCATION MARKETERS RATE THE RETURN ON THEIR GENERATIVE AI INVESTMENTS?

We now know that most brands are using generative AI already, and we have an idea of what they're finding it most useful for, but how much ROI are businesses seeing from their investments in artificial intelligence?

We asked those who are investing in generative AI about the returns they've seen so far. Perhaps unsurprisingly, considering how many use it, It appears that generative AI mostly exceeds expectations, suggesting that, even in its nascent form, this technology is having an incredible impact on businesses and consumers alike.

For **98%** of multi-location businesses, the ROI of generative AI has "met or exceeded expectations".

Category	Value
Greatly exceeded expectations	27%
Somewhat exceeded expectations	37%
Met expectations	35%
Somewhat fallen short of expectations	2%
Greatly fallen short of expectations	0%

0.0%   10.0%   20.0%   30.0%   40.0%

05
SUMMARY

If your marketing performance fell short of expectations in 2023, we're not here to tell you to increase your local marketing function by a certain percentage or that adopting new marketing tech will immediately boost your results.

But the beauty of benchmarking is that it allows you to lift your head out of the sand (or various other reports) and consider opportunities for improvement: to compare what competitors in the multi-location marketing space are doing and pinpoint why they may have been outperforming you.

Perhaps your team has even had a hunch about implementing a particular tactic or tool and has not quite had a case to prove to unlock some budget. We hope that this report's findings will help strengthen that case for you and highlight new areas to think about.

One thing stands out for sure, though, and that is **the overarching importance of local marketing in contributing to brand performance.** It's clear from our benchmarking that brands with dedicated, knowledgeable local marketing teams and local-specific strategies in place are outperforming others.
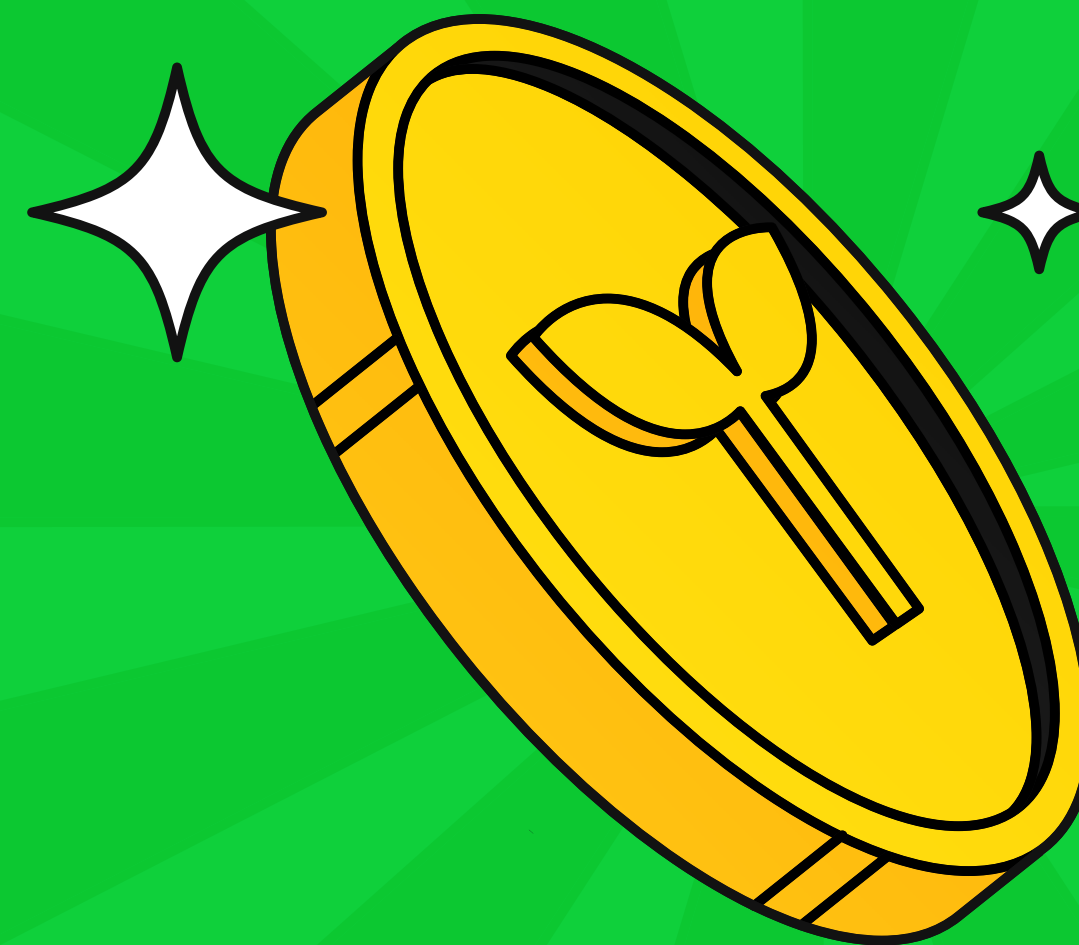
About BrightLocal

What you've just read shows the power of dedicated local marketing strategies and local SEO knowledge to impact brand performance.

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BRAND BEACON REPORT 2024

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