

The Role of Click to Call In the Path to Purchase

September 2013



Google™



BACKGROUND & METHODOLOGY

Background

Google commissioned Ipsos, an independent market research company, to understand consumer attitudes about click to call within organic and paid mobile search results. The study explored behaviors within the context of 7 different Google verticals: Travel, Restaurant, Finance, Retail, Technology, Local Services and Auto.*

*Note: The presentation also includes metrics calculated from internal Google data looking at click to call performance of thousands of AdWords accounts in aggregate.

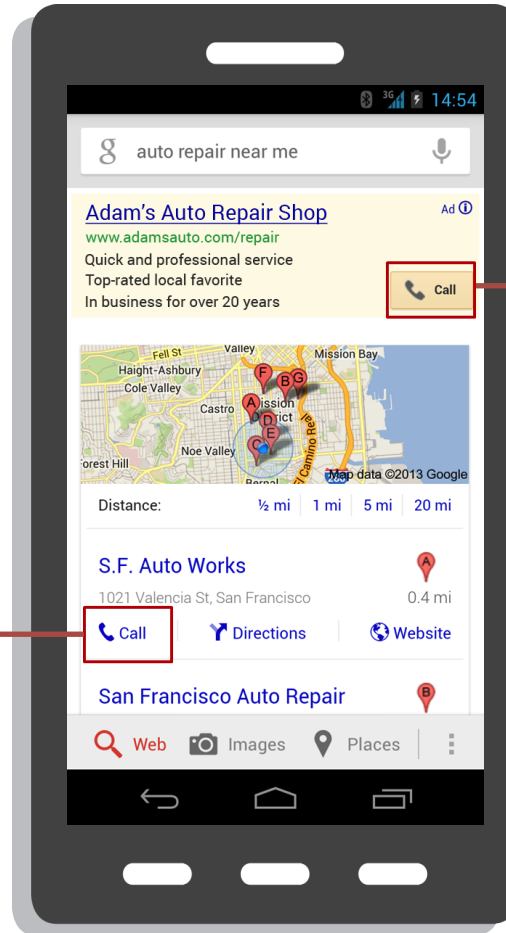
Methodology

3,000 respondents were recruited and completed a 20 minute online survey between July 2 and July 8, 2013. Respondents met the following criteria for inclusion in this research:

- Aged 18-74
- Smartphone users (own a smartphone and use mobile search at least a few times/week)
- Made a purchase in at least one of the verticals in the past six months

After seeing a sample mobile Search Engine Results Page, which included the click to call feature, respondents were asked a number of questions. The questions probed into their general thoughts about click to call as well as specific questions about the vertical that they recently purchased in.

CLICK TO CALL OPTIONS IN MOBILE SEARCH RESULTS



Click to call button on mobile search ad

Click to call button on organic mobile search result

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KEY FINDINGS



Click to call is one of the most used features on the mobile search engine results page

70% of mobile searchers have used click to call to connect with a business directly from the search engine results page.

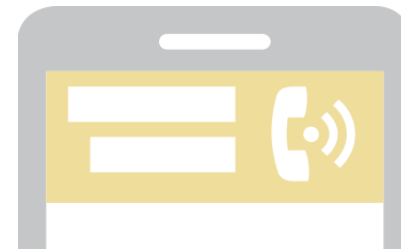


These calls are valuable

61% of mobile searchers state that click to call is most important in the purchase phase of the shopping process.

The ability to call is important to maintain a strong brand image

47% of mobile searchers say that if a business does not have a phone number associated with their search results, they will be more likely to explore other brands.



Click to call is an important tool in mobile search ad campaigns

Adding a phone number to mobile search ads results in an average click through rate increase of 8%.

CLICK TO CALL IS USED FREQUENTLY BY MOBILE SEARCHERS

70%

of **mobile searchers**
have used “the call button”



Frequency of **needing to directly call** a business from the mobile search results.

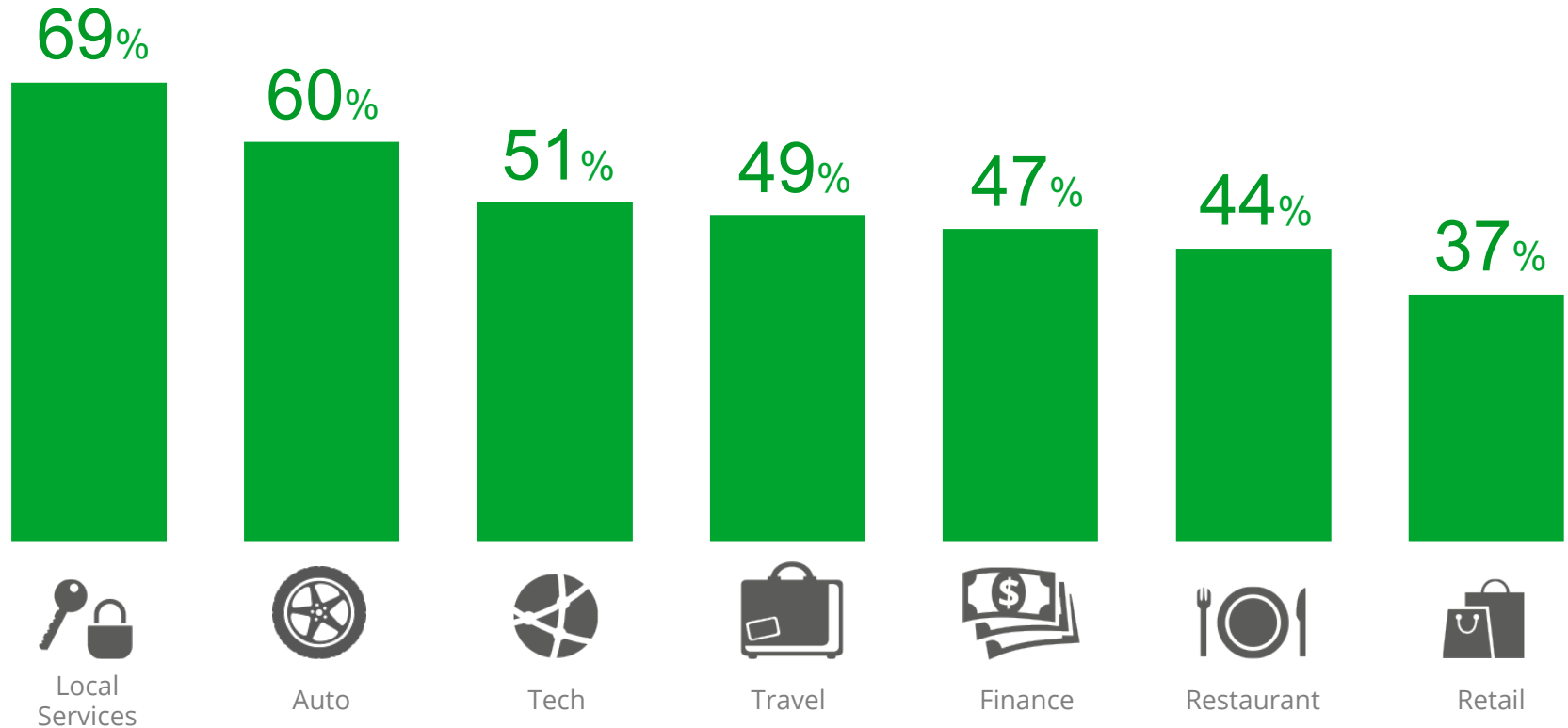
Always	12%
Frequently	39%
Sometimes	35%
Rarely	12%
Never	2%

BASE: TOTAL RESPONDENTS (3000)

Q1. HAVE YOU EVER USED ANY OF THE FOLLOWING FEATURES WHEN SEARCHING FOR INFORMATION ON YOUR SMARTPHONE? Q4. HOW OFTEN WHILE SEARCHING FOR INFORMATION ON YOUR SMARTPHONE DO YOU FIND YOURSELF NEEDING TO CALL A BUSINESS DIRECTLY (REGARDLESS OF WHETHER OR NOT THE OPTION IS AVAILABLE TO YOU)? 5PT SCALE FROM “NEVER” TO “ALWAYS”; TOP 2 BOX SHOWN.

CONSUMERS ACROSS ALL VERTICALS ARE LIKELY TO USE CLICK TO CALL

% who would be likely to call if the capability was available in a smartphone search result

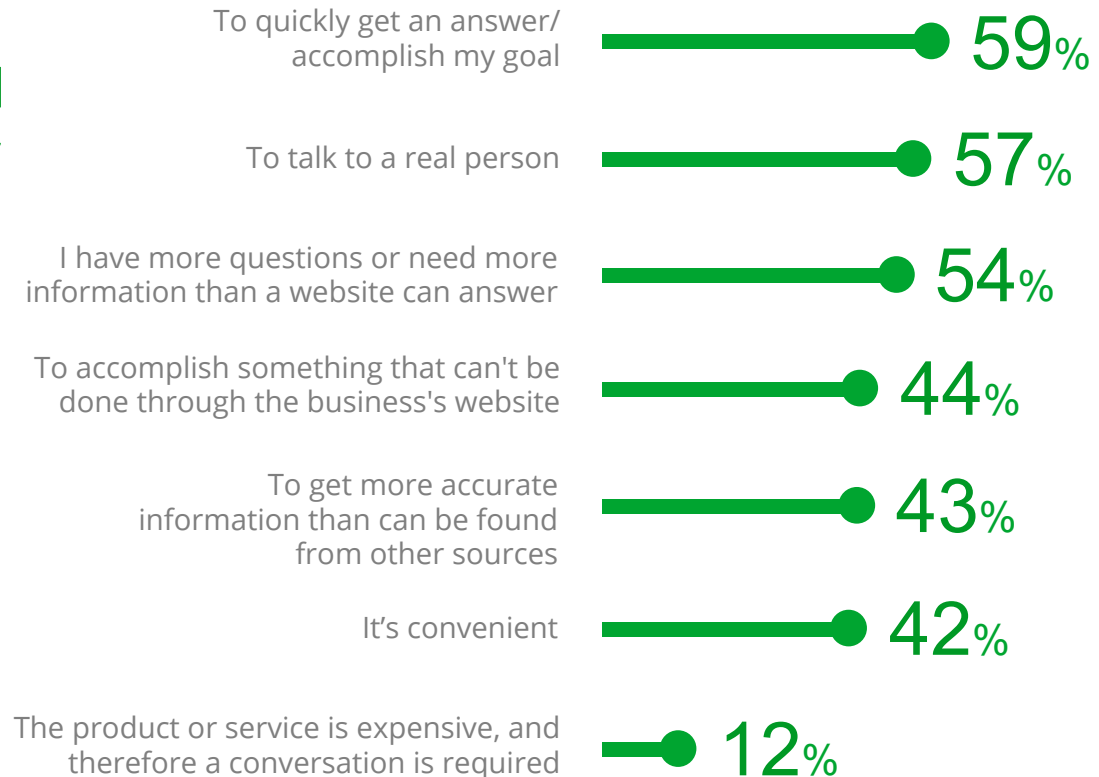


BASE: VERTICAL-SPECIFIC USERS/PURCHASERS
Q8 IS THE FIRST IN THE SET OF QUESTIONS BASED AMONG SUB-VERTICAL QUOTA ASSIGNMENTS.

Q8. IF YOU HAD BEEN CONDUCTING A SEARCH FOR [INSERT SUB-VERTICAL NAME] INFORMATION AND RECEIVED RESULTS ON YOUR SMARTPHONE SIMILAR TO THOSE SHOWN BELOW (BUT RELEVANT TO YOUR LOCATION AND SEARCH), HOW LIKELY WOULD YOU BE TO CALL A BUSINESS? 5PT SCALE FROM "NOT AT ALL LIKELY" TO "EXTREMELY LIKELY"; TOP 2 BOX SHOWN.

QUICK ANSWERS AND REAL TIME FEEDBACK ARE THE LEADING MOTIVATIONS FOR USING CLICK TO CALL

Reasons for calling a business as opposed to using a website or other means

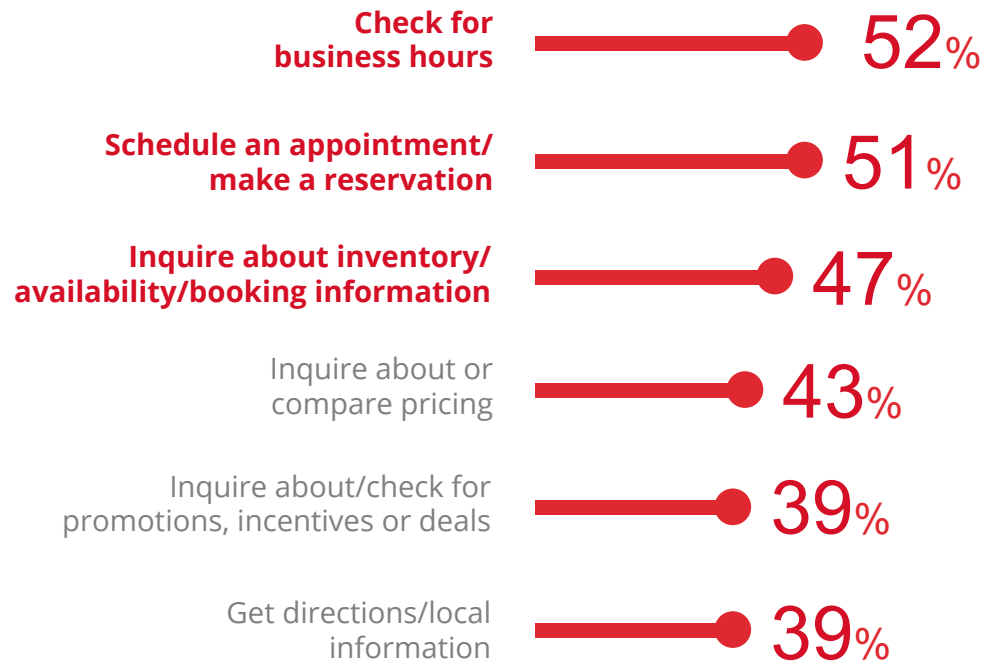


BASE: TOTAL RESPONDENTS (3000)

Q5. FOR WHICH OF THE FOLLOWING REASONS, IF ANY, WOULD YOU CHOOSE TO CALL A BUSINESS AFTER SEARCHING FOR INFORMATION ON YOUR SMARTPHONE? SELECT ALL THAT APPLY.

PEOPLE ACCOMPLISH A WIDE VARIETY OF TASKS VIA PHONE CALLS

% who call a business directly from a search for each task



BASE: VERTICAL-SPECIFIC USERS/PURCHASERS

Q10. WHEN THINKING ABOUT ALL OF THE SEARCHES YOU CONDUCT FOR [INSERT SUB-VERTICAL NAME] INFORMATION, WHICH OF THE FOLLOWING ARE REASONS WHY YOU MAY CALL A BUSINESS DIRECTLY? SELECT ALL THAT APPLY.

THE TASKS ACCOMPLISHED VIA CLICK TO CALL VARY BY INDUSTRY

% who may call a business directly from a search for each task

Check for the business's hours	59%	36%	60%	60%	38%	59%	53%
Schedule an appointment/ make a reservation	47%	48%	57%	73%	44%	28%	40%
Inquire about inventory/ availability/booking information	49%	33%	57%	52%	41%	52%	52%
Inquire about or compare pricing	24%	45%	52%	54%	40%	35%	48%
Inquire about/check for promotions, incentives or deals	37%	35%	40%	41%	43%	33%	44%
Get directions/ location information	42%	28%	42%	46%	38%	35%	41%
Make a purchase over the phone	45%	36%	21%	40%	39%	19%	29%
Inquire about or compare a product	-	41%	43%	51%	32%	28%	40%
Request more information be sent	12%	45%	33%	45%	28%	22%	36%
Put an item on hold	-	-	33%	-	25%	37%	35%



Restaurant



Finance



Auto



Local



Travel



Retail



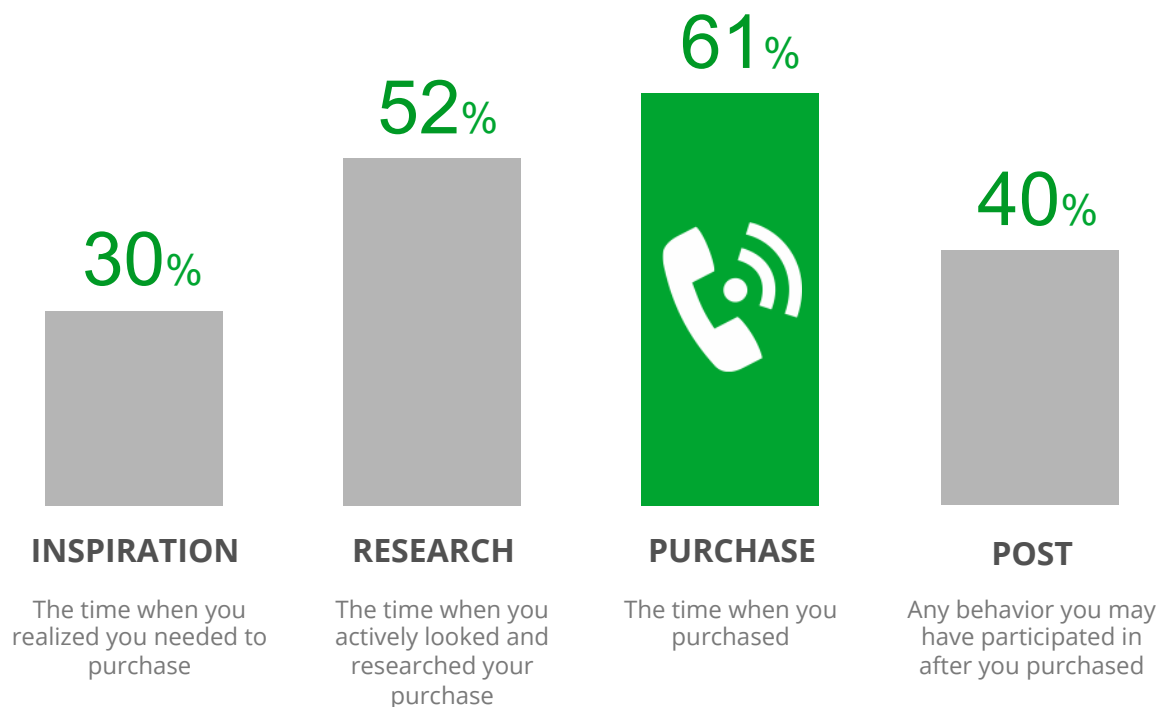
Tech

BASE: TOTAL

Q10. WHEN THINKING ABOUT ALL OF THE SEARCHES YOU CONDUCT FOR [INSERT SUB-VERTICAL NAME] INFORMATION, WHICH OF THE FOLLOWING ARE REASONS WHY YOU MAY CALL A BUSINESS DIRECTLY? SELECT ALL THAT APPLY.

CLICK TO CALL FUNCTIONALITY IS MOST IMPORTANT DURING THE PURCHASE AND RESEARCH PHASES

% who find it extremely/very important to be able to call the business during each phase of decision-making

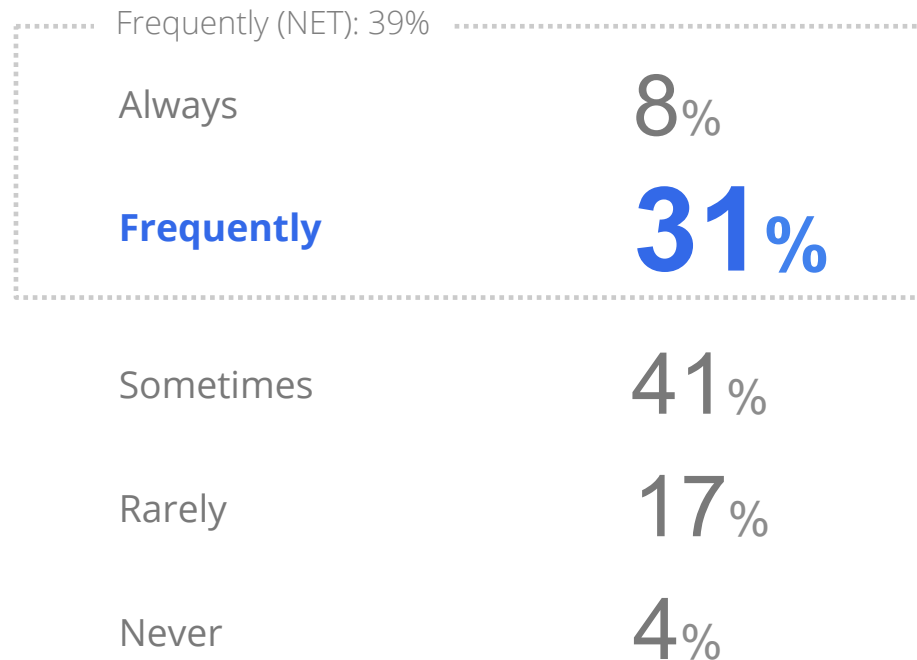
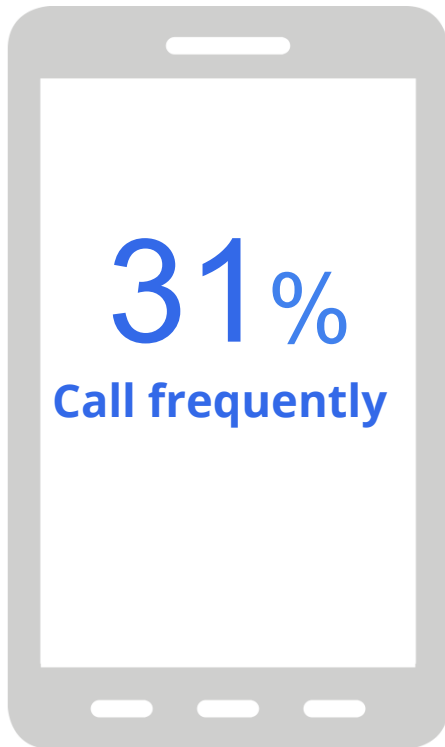


BASE: VERTICAL-SPECIFIC USERS/PURCHASERS

Q9. ASSUMING YOU USED A SEARCH ENGINE ON YOUR SMARTPHONE TO OBTAIN INFORMATION ON [INSERT SUB-VERTICAL NAME], HOW IMPORTANT IS IT FOR YOU TO BE ABLE TO CALL THE BUSINESS DURING EACH OF THESE PHASES OF THE DECISION-MAKING PROCESS? SELECT ONE FOR EACH PHASE. 5PT SCALE OF "NOT AT ALL IMPORTANT" TO "EXTREMELY IMPORTANT"; TOP 2 BOX SHOWN.

CONSUMERS CALL MORE FREQUENTLY WHEN THEY ARE READY TO MAKE A PURCHASE

% who call a business when specifically looking to make a purchase or transaction



BASE: TOTAL RESPONDENTS (3000); EVER CALL A BUSINESS DURING DECISION MAKING PROCESS (2939)

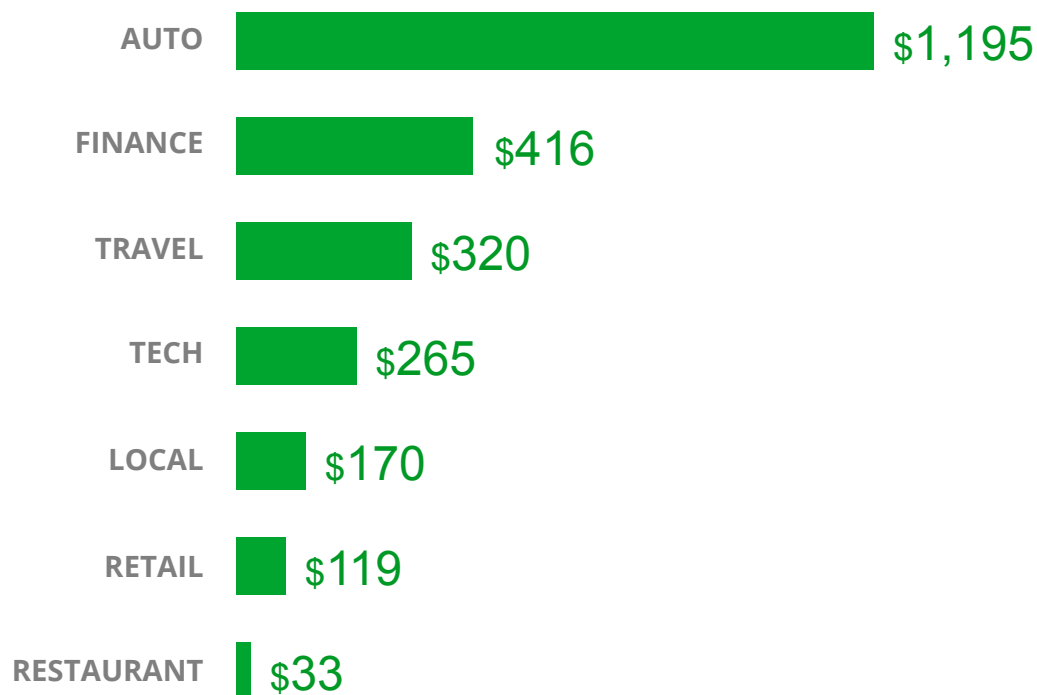
Q17. HOW OFTEN DO YOU CALL A BUSINESS WHEN SPECIFICALLY LOOKING TO MAKE A PURCHASE OR TRANSACTION? 5PT SCALE FROM "NEVER" TO "ALWAYS"; TOP 2 BOX SHOWN.

PRICE IS AN IMPORTANT FACTOR IN DETERMINING WHETHER A CONSUMER PREFERS TO CALL BEFORE MAKING A PURCHASE

Mean price point at which one would be more likely to call a business for a purchase/transaction



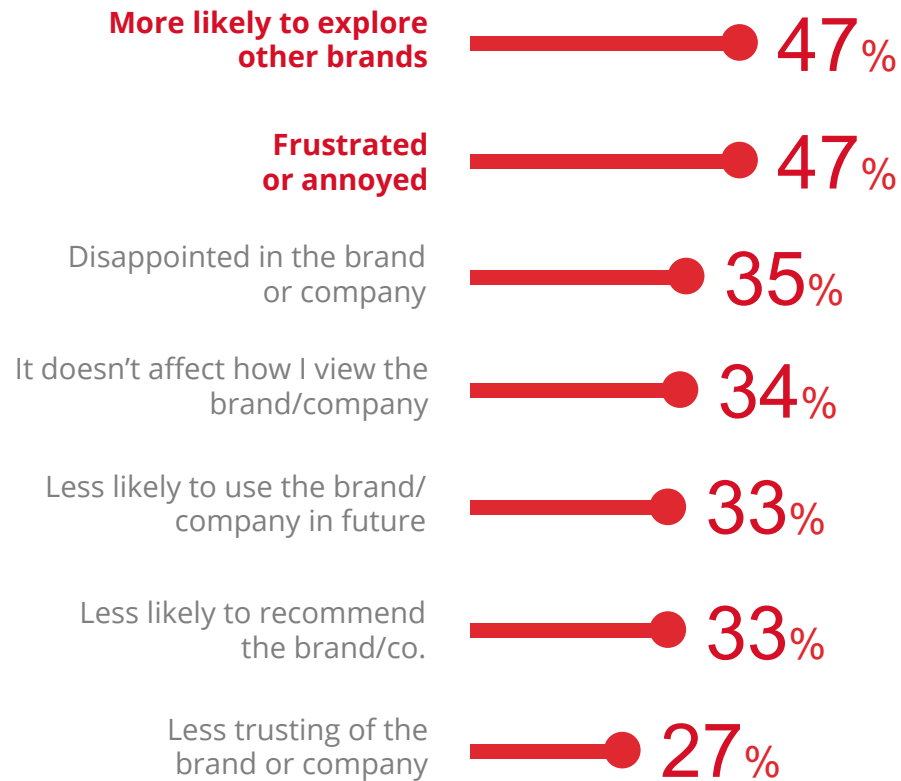
Highest price threshold



BASE: MORE/EQUALLY LIKELY TO CALL IF PRICE OF PRODUCT/SERVICE IS HIGH
Q13. AT WHAT PRICE POINT WOULD YOU BE MORE LIKELY TO CALL A BUSINESS IF YOU WERE LOOKING TO MAKE A(N) [INSERT SUB-VERTICAL NAME] PURCHASE OR TRANSACTION? WHEN THE PRICE IS AT LEAST.

LACK OF A CALL BUTTON CAN DAMAGE CONSUMER'S PERCEPTION OF A BUSINESS

% who say the following statements describe how they feel when unable to call a business directly from the search results on their smartphone

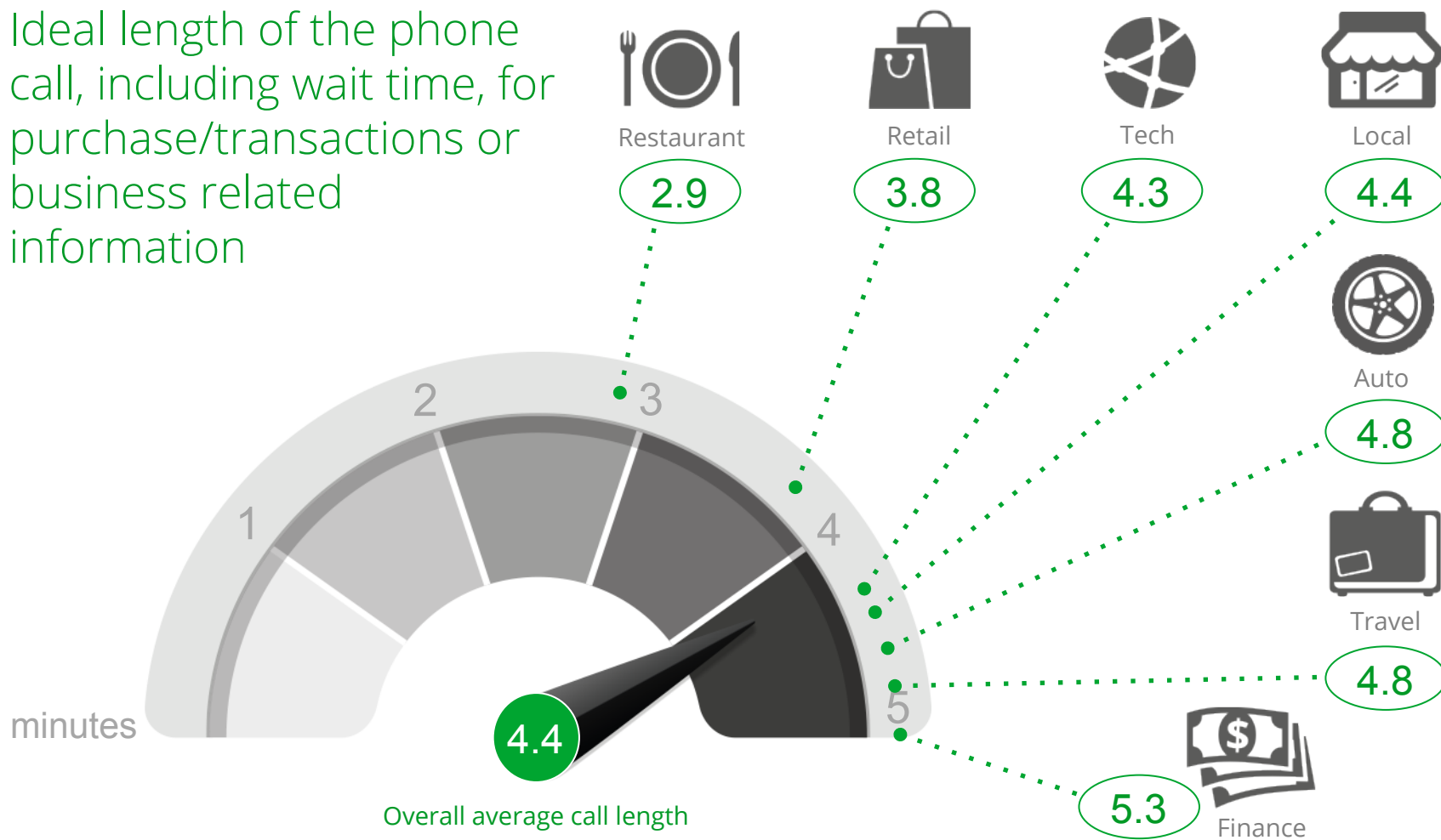


BASE: VERTICAL-SPECIFIC USERS/PURCHASERS

Q11. HOW WELL DO THE FOLLOWING STATEMENTS DESCRIBE HOW YOU FEEL WHEN YOU ARE UNABLE TO CALL A BUSINESS DIRECTLY FROM THE SEARCH RESULTS ON YOUR SMARTPHONE? 5PT SCALE FROM "DOES NOT DESCRIBE AT ALL" TO "DESCRIBES COMPLETELY"; TOP 2 BOX SHOWN.

88% OF MOBILE SEARCHERS CONSIDER CALL LENGTH TO BE IMPORTANT

Ideal length of the phone call, including wait time, for purchase/transactions or business related information



BASE: VERTICAL-SPECIFIC USERS/PURCHASERS

Q14. WHEN CALLING A BUSINESS FOR [INSERT SUB-VERTICAL NAME] RELATED INFORMATION OR PURCHASES/TRANSACTIONS, WHAT DO YOU BELIEVE IS THE IDEAL LENGTH OF THE PHONE CALL?

CALLS DRIVEN BY SEARCH ADS ARE SUBSTANTIVE AND VALUABLE FOR BUSINESSES



72%

of clicks on a mobile search ad call button last longer than 30 seconds

6 minutes

Average length of calls driven from search ads

SOURCE: GOOGLE INTERNAL DATA, BASED ON CALLS FROM GOOGLE FORWARDING NUMBER CALL REPORTING

THE ADDITION OF A CALL BUTTON INCREASES OVERALL SEARCH AD PERFORMANCE



8%

Increase in ad click-through rate
when call extensions are enabled

SOURCE: GOOGLE INTERNAL DATA

CLICK TO CALL DRIVES MILLIONS OF CALLS FOR ADVERTISERS EVERY MONTH

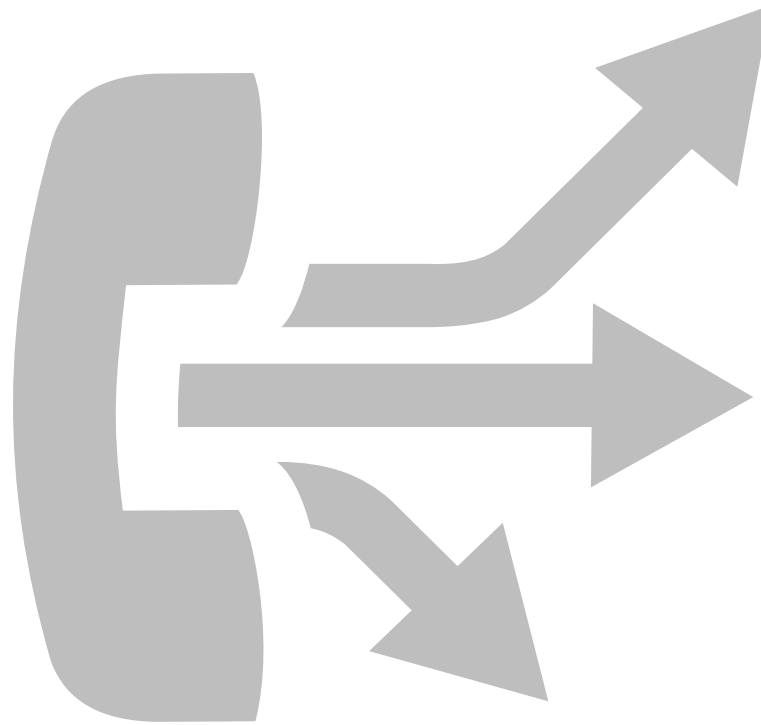


On average,

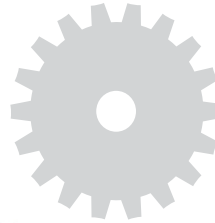
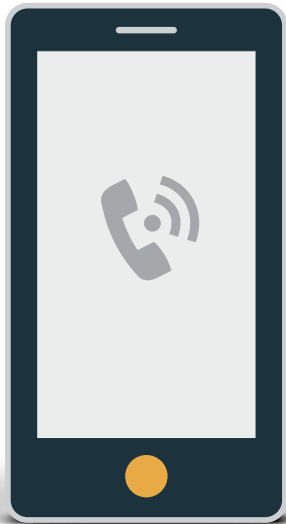
40 million

calls are driven by Google ads each month

SOURCE: GOOGLE INTERNAL DATA



Implications for businesses

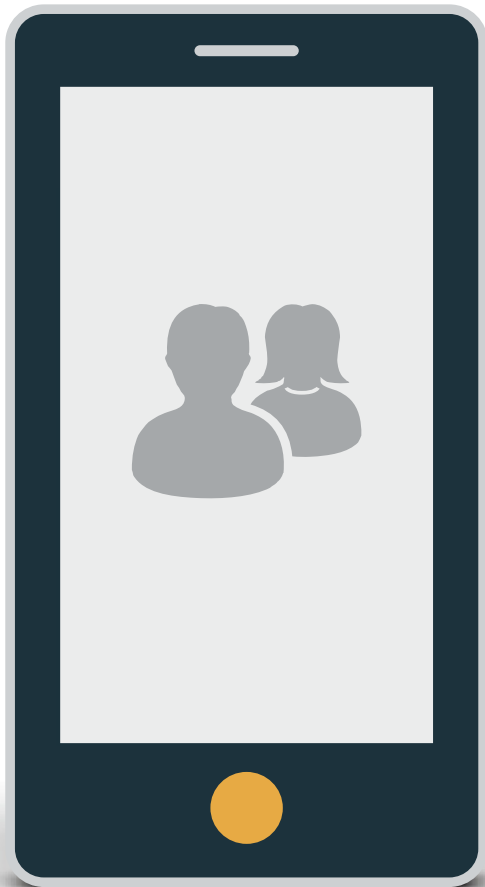


Adding call extensions to your search ads helps you connect with your customers

Implement call extensions on your mobile search campaigns. With call extensions you gain access to call specific reporting metrics such as call duration and caller area codes.

You can also use call scheduling to make sure that call extensions are only showing up at times when it's strategic for your business.

Calls are an important mobile conversion path and should be measured accordingly.



Track calls as conversions to measure the full value of your mobile campaigns.



Optimize your campaigns to increase phone call conversions. Identify keywords and ads that are driving a large volume of phone calls and implement conversion-based bidding tools.



Attribute an estimated value to the calls you receive. With your company's average order value and the percentage of calls that are transactional in your industry, you can estimate the value of clicks from your call extensions. If driving phone calls is a valuable goal, you can increase your mobile bid modifier to ensure that your ads show up more often on mobile devices.

Vertical Breakouts

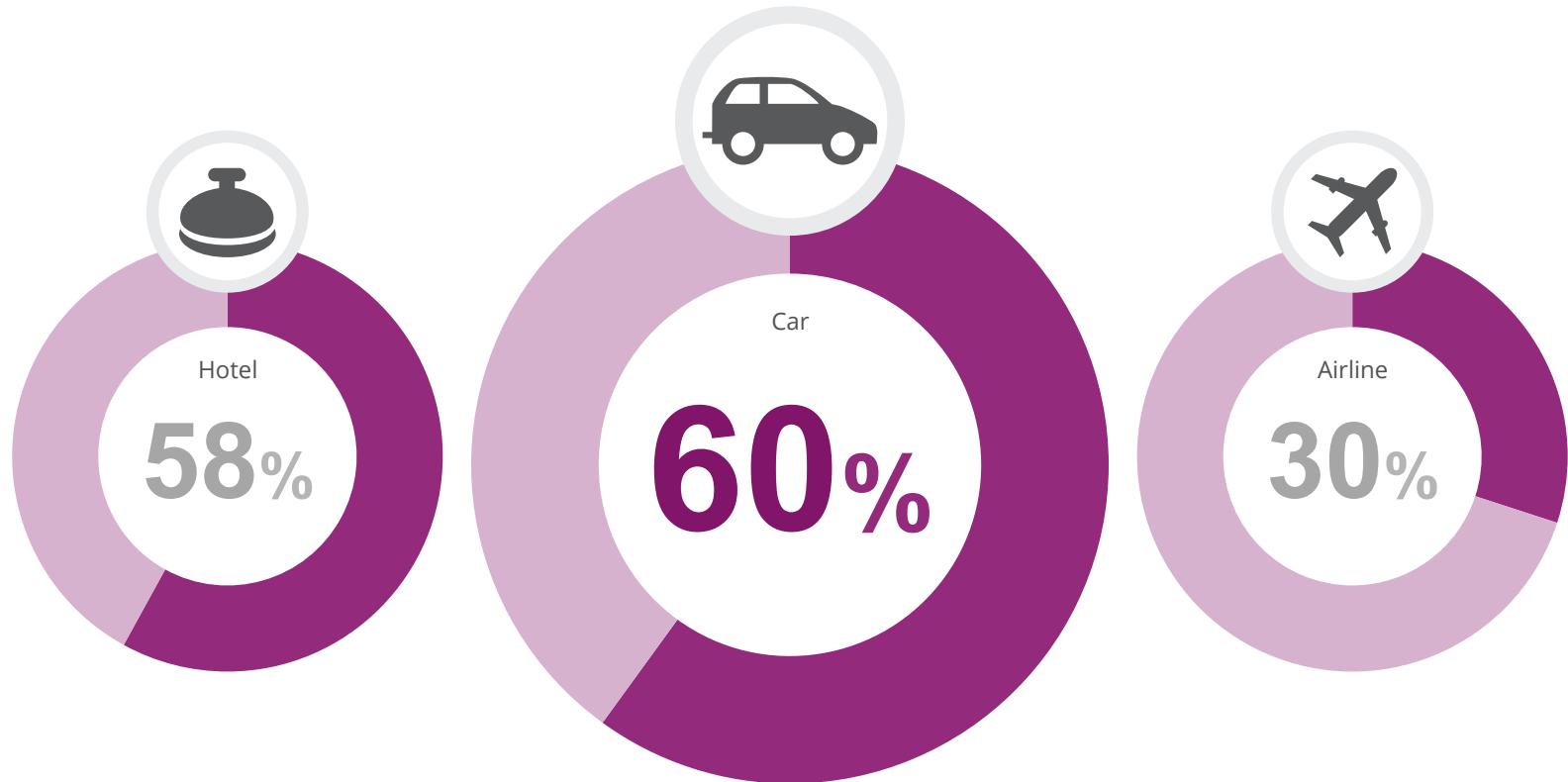




Travel

CLICK TO CALL IS IMPORTANT ACROSS ALL PARTS OF THE TRAVEL PROCESS

% who would be extremely/very likely to call if the call capability was available in smartphone search

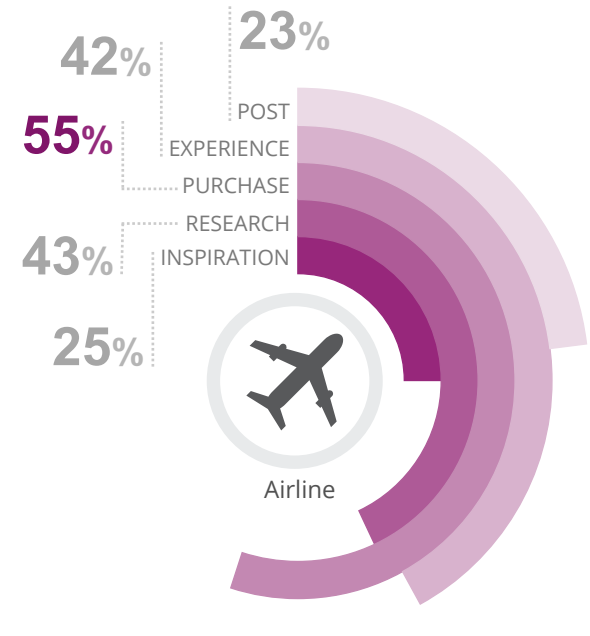
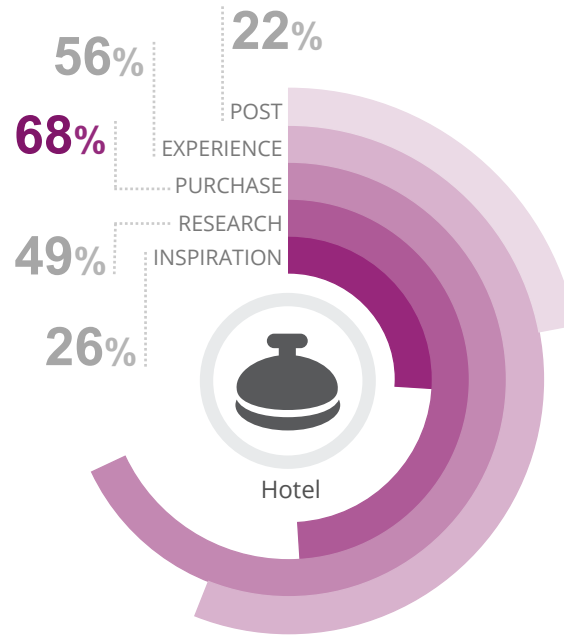
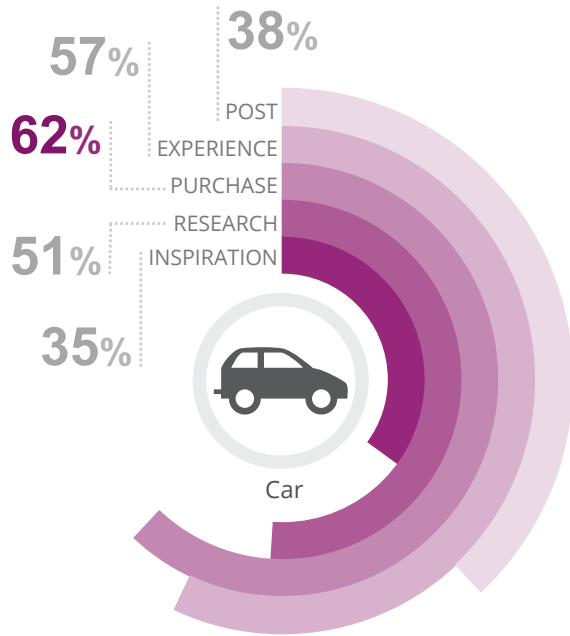


BASE: TOTAL RESPONDENTS EXCLUDING THOSE WHO HAVE NO NEED TO SEARCH FOR THIS TYPE OF INFORMATION (FLOATING BASE)

Q8. FOR EACH OF THE FOLLOWING, HOW IMPORTANT IS IT TO HAVE THE ABILITY TO BE ABLE TO CALL THE BUSINESS DIRECTLY FROM YOUR SEARCH RESULTS AS YOU LOOK FOR INFORMATION ON EACH OF THESE ITEMS? PLEASE SELECT ONE FOR EACH PRODUCT/SERVICE. 4PT SCALE FROM "I HAVE NO NEED TO SEARCH FOR THIS TYPE OF INFORMATION" TO "MUST HAVE"; TOP 2 BOX SHOWN.

WITHIN THE TRAVEL CATEGORY, THE ABILITY TO PLACE A CALL IS MOST IMPORTANT DURING THE PURCHASE PHASE

% who find it extremely/very important to be able to call the business during each phase of decision-making



INSPIRATION

The time when you identified you wanted or needed to book travel; when you started thinking about taking a trip or when you were inspired or prompted by an event that you needed to attend.

RESEARCH

The time when you actively looked and researched your trip or travel plans (looking into destinations, prices, travel times, etc.)

PURCHASE

The time when you booked your trip.

EXPERIENCE

Any behavior you may have participated in **during** your trip (looking for a restaurant, uploading photos, status messaging about your trip, etc.)

POST

Any behavior you may have participated in **after** you took your trip (sharing your experience/photos, recommending to friends or family, writing a review, etc.)

BASE: TRAVEL USERS/PURCHASERS

Q9. ASSUMING YOU USED A SEARCH ENGINE ON YOUR SMARTPHONE TO OBTAIN INFORMATION ON [INSERT SUB-VERTICAL NAME], HOW IMPORTANT IS IT FOR YOU TO BE ABLE TO CALL THE BUSINESS DURING EACH OF THESE PHASES OF THE DECISION-MAKING PROCESS? SELECT ONE FOR EACH PHASE.. 5PT SCALE OF "NOT AT ALL IMPORTANT" TO "EXTREMELY IMPORTANT"; TOP 2 BOX SHOWN.

OVER HALF WILL CALL A TRAVEL BUSINESS TO MAKE CHANGES TO THEIR RESERVATION/BOOKING

% who may call a business directly from a search for each reason



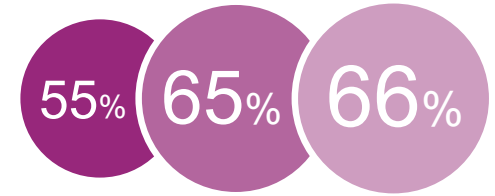
Car



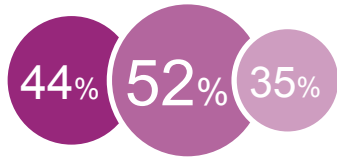
Hotel



Airline



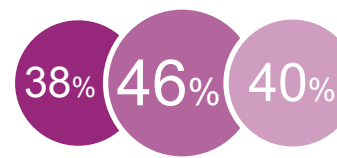
Make changes to my reservation/booking



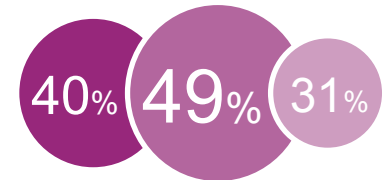
Schedule an appointment/make a reservation



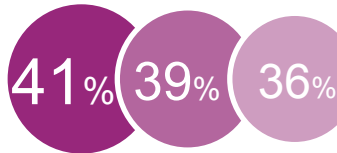
Inquire about/check for promotions, incentives or deals



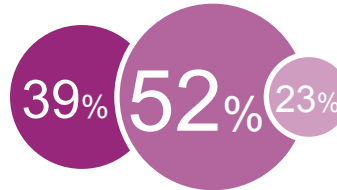
Inquire about booking or itinerary information



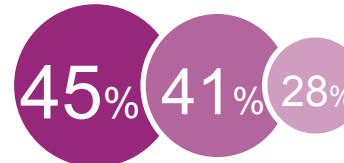
Inquire about or compare pricing



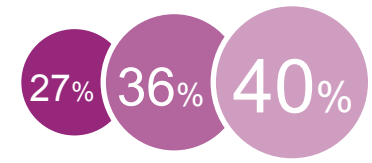
Make a purchase/transaction over the phone



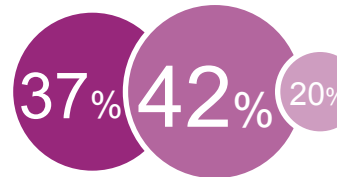
Get directions/location information



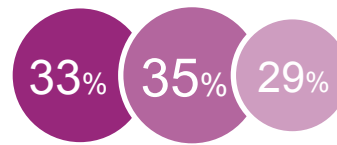
Check for the business's hours



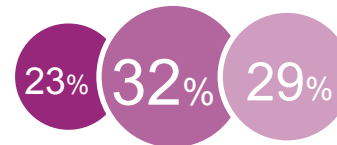
Check or redeem loyalty program points/frequent flier miles, etc.



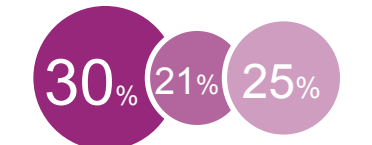
Locate or get directions to a store/business



Inquire about or compare specific product/service features



Request more information to be sent to me (e.g., brochure...)



Put an item on hold

BASE: TRAVEL USERS/PURCHASERS

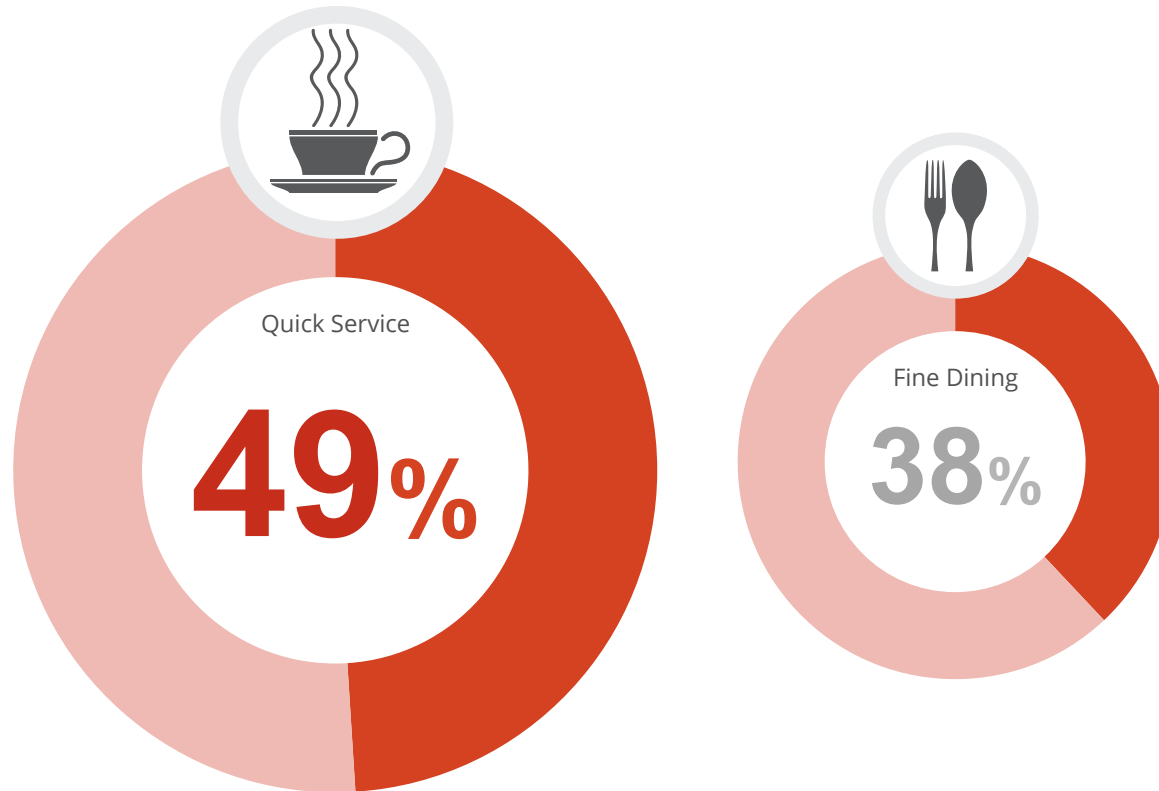
Q10. WHEN THINKING ABOUT ALL OF THE SEARCHES YOU CONDUCT FOR [INSERT SUB-VERTICAL NAME] INFORMATION, WHICH OF THE FOLLOWING ARE REASONS WHY YOU MAY CALL A BUSINESS DIRECTLY? SELECT ALL THAT APPLY.



Restaurant

HALF OF THOSE SEARCHING FOR QUICK SERVICE DINING WOULD BE LIKELY TO PLACE A CALL FROM A SEARCH

% who would be extremely/very likely to call if the call capability was available in smartphone search

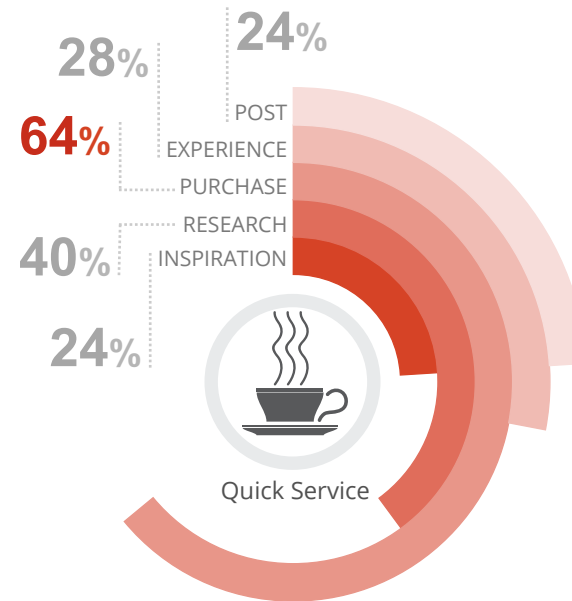
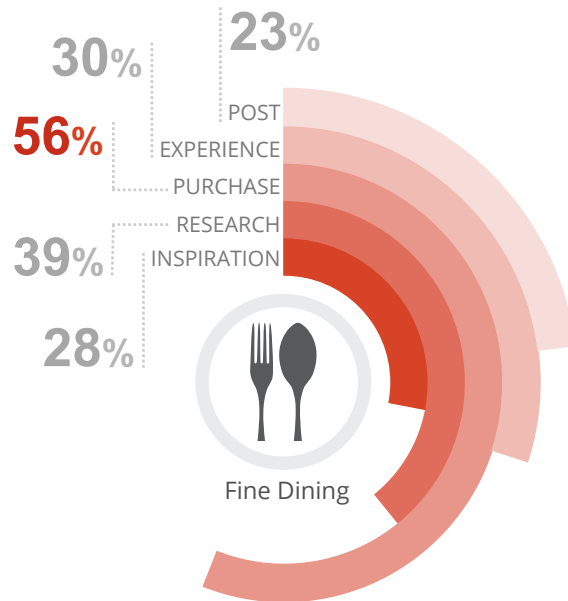


BASE: RESTAURANT USERS/PURCHASERS
Q8 IS THE FIRST IN THE SET OF QUESTIONS BASED AMONG SUB-VERTICAL QUOTA ASSIGNMENTS.

Q8. IF YOU HAD BEEN CONDUCTING A SEARCH FOR [INSERT SUB-VERTICAL NAME] INFORMATION AND RECEIVED RESULTS ON YOUR SMARTPHONE SIMILAR TO THOSE SHOWN BELOW (BUT RELEVANT TO YOUR LOCATION AND SEARCH), HOW LIKELY WOULD YOU BE TO CALL A BUSINESS? 5PT SCALE FROM "NOT AT ALL LIKELY" TO "EXTREMELY LIKELY"; TOP 2 BOX SHOWN.

WITHIN THE RESTAURANT CATEGORY, THE ABILITY TO PLACE A CALL IS MOST IMPORTANT DURING THE PURCHASE PHASE

% who find it extremely/very important to be able to call the business during each phase of decision-making



INSPIRATION

When you started thinking about visiting or ordering from a restaurant; when you were inspired by an occasion that would prompt visiting or ordering from a restaurant.

RESEARCH

The time when you actively looked and researched your restaurant plans (looking into menus, prices, reviews, etc.)

PURCHASE

The time when you placed an order for food or beverages at a restaurant.

EXPERIENCE

Any behavior you may have participated in **during** your visit or meal (uploading photos, "checking in" at the restaurant via a social network, etc.)

POST

Any behavior you may have participated in **after** you bought at a restaurant (sharing your experience/photos, recommending to friends or family, writing a review, etc.)

BASE: RESTAURANT USERS/PURCHASERS

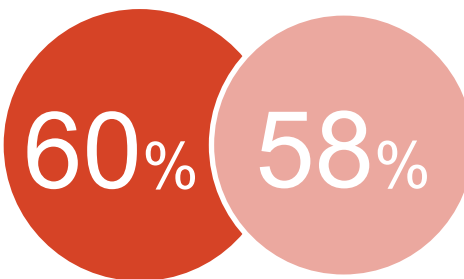
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THE TOP REASONS FOR CALLING A RESTAURANT INCLUDE CHECKING HOURS, MAKING A RESERVATION (FOR CASUAL) OR PLACING AN ORDER (FOR QSR)

% who may call a business directly from a search for each reason



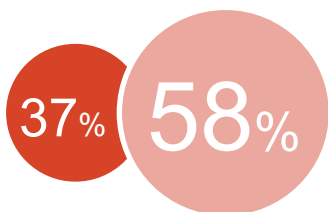
Quick Service



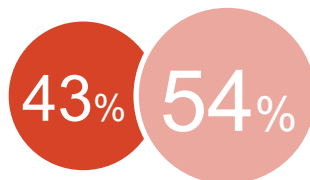
Check for the business's hours



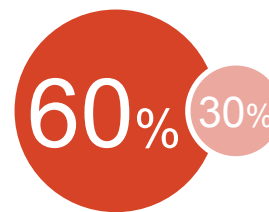
Fine Dining



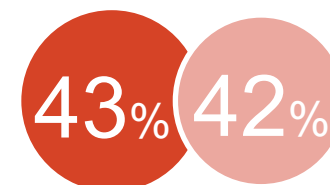
Schedule an appointment/make a reservation



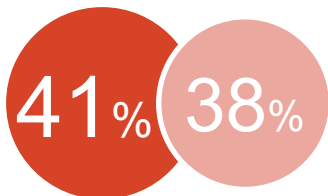
Inquire about reservation availability, menus



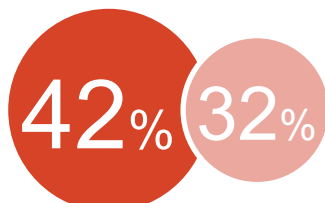
Make a purchase/transaction over the phone



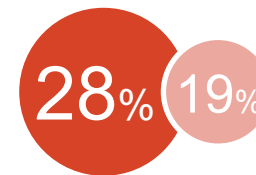
Get directions/location information



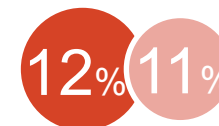
Locate or get directions to a store/business



Inquire about/check for promotions, incentives or deals



Inquire about or compare pricing



Request more information be sent to me (e.g., brochure, price quote)

BASE: RESTAURANT USERS/PURCHASERS

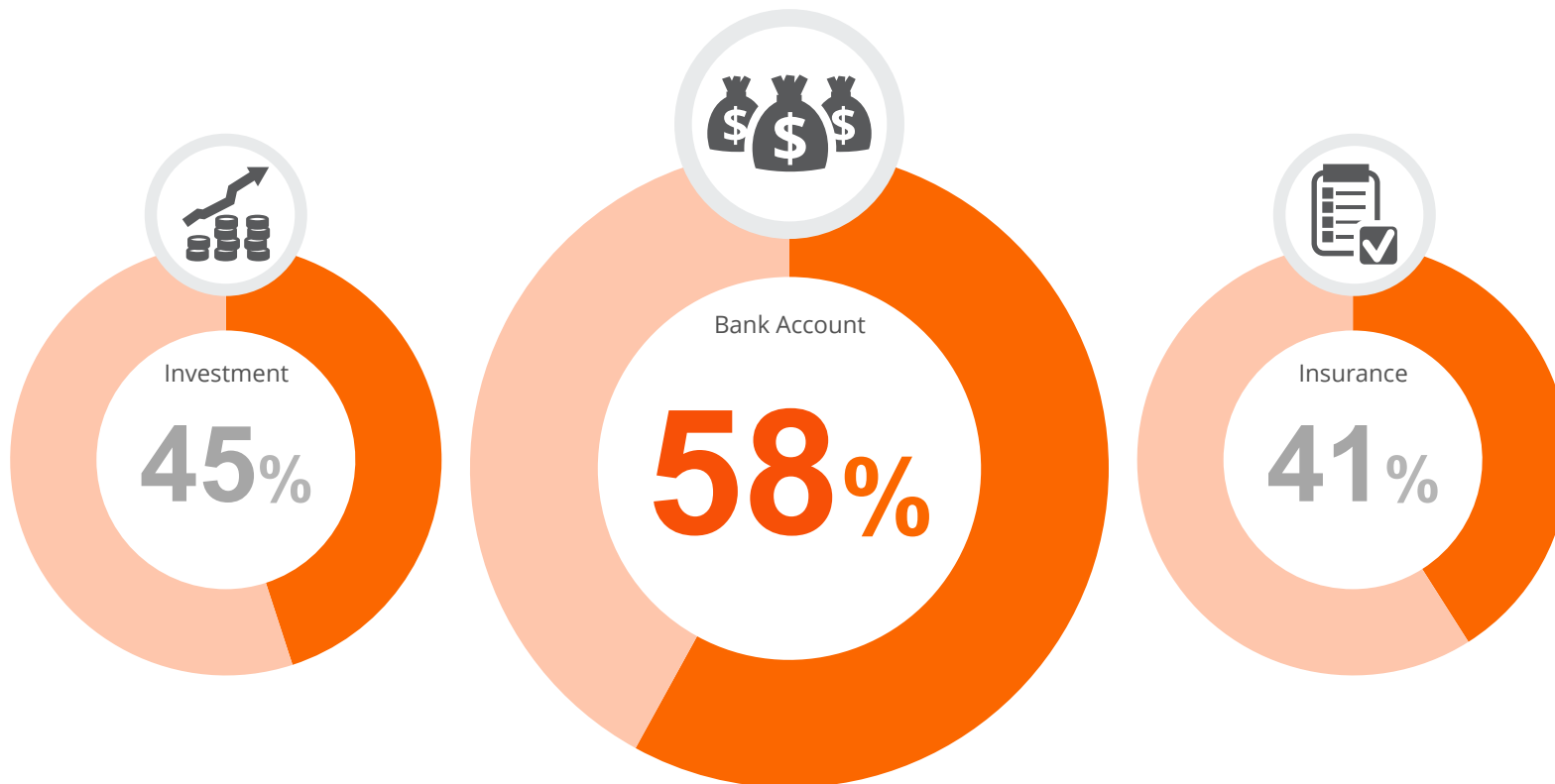
Q10. WHEN THINKING ABOUT ALL OF THE SEARCHES YOU CONDUCT FOR [INSERT SUB-VERTICAL NAME] INFORMATION, WHICH OF THE FOLLOWING ARE REASONS WHY YOU MAY CALL A BUSINESS DIRECTLY? SELECT ALL THAT APPLY.



Finance

ABOUT SIX IN TEN SEARCHERS FOR BANK ACCOUNT INFORMATION WOULD PLACE A PHONE CALL FROM SEARCH IF GIVEN THE OPTION

% who would be extremely/very likely to call if the call capability was available in smartphone search

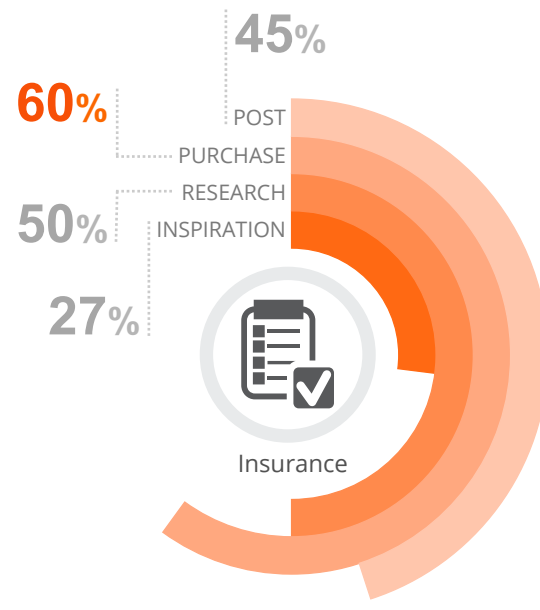
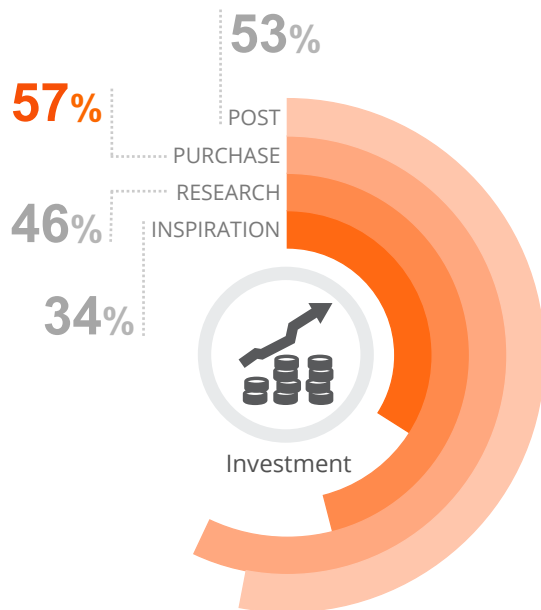
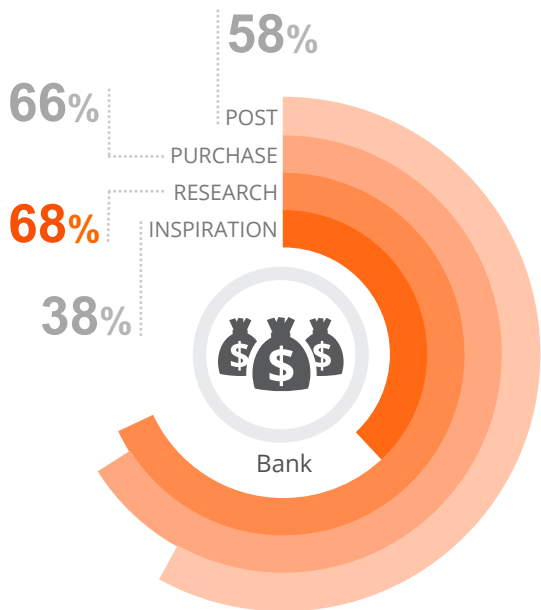


BASE: FINANCE USERS/PURCHASERS
Q8 IS THE FIRST IN THE SET OF QUESTIONS BASED AMONG SUB-VERTICAL QUOTA ASSIGNMENTS.

Q8. IF YOU HAD BEEN CONDUCTING A SEARCH FOR [INSERT SUB-VERTICAL NAME] INFORMATION AND RECEIVED RESULTS ON YOUR SMARTPHONE SIMILAR TO THOSE SHOWN BELOW (BUT RELEVANT TO YOUR LOCATION AND SEARCH), HOW LIKELY WOULD YOU BE TO CALL A BUSINESS? 5PT SCALE FROM "NOT AT ALL LIKELY" TO "EXTREMELY LIKELY"; TOP 2 BOX SHOWN.

THE NEED FOR A CALL RELATED TO A FINANCE SEARCH IS MOST IMPORTANT AT THE PURCHASE STAGE OVERALL, WHILE THE RESEARCH PHASE FOR BANK ACCOUNTS IS THE MOST IMPORTANT

% who find it extremely/very important to be able to call the business during each phase of decision-making



INSPIRATION

The time when you realized you wanted or needed to make a finance-related transaction or purchase (perhaps prompted or triggered by a specific event). This is the moment you began dreaming or thinking about your desire to transact or purchase but had not yet started shopping/researching.

RESEARCH

The time when you actively looked and researched your account or financial transaction/purchase (looking into price, interest rates, services, etc.)

PURCHASE

The time when you opened your account or made a financial transaction/purchase. This includes using the device while at a bank or financial institution.

POST

Any behavior you may have participated in **after** you opened your account or made a financial transaction/purchase (sharing your experience, recommending to friends or family, writing a review, etc.)

BASE: FINANCE USERS/PURCHASERS

Q9. ASSUMING YOU USED A SEARCH ENGINE ON YOUR SMARTPHONE TO OBTAIN INFORMATION ON [INSERT SUB-VERTICAL NAME], HOW IMPORTANT IS IT FOR YOU TO BE ABLE TO CALL THE BUSINESS DURING EACH OF THESE PHASES OF THE DECISION-MAKING PROCESS? SELECT ONE FOR EACH PHASE. 5PT SCALE OF "NOT AT ALL IMPORTANT" TO "EXTREMELY IMPORTANT"; TOP 2 BOX SHOWN.

OVER HALF WOULD CALL A FINANCIAL BUSINESS TO MAKE CHANGES TO THEIR ACCOUNT

% who may call a business directly from a search for each reason



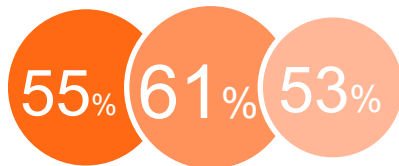
Bank



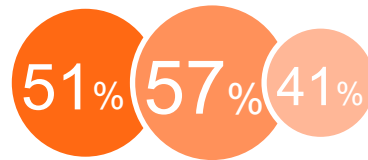
Investment



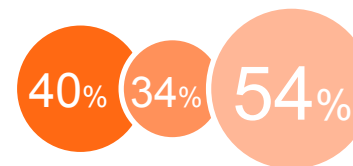
Insurance



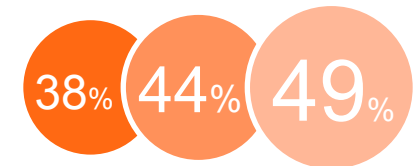
Make changes to my account



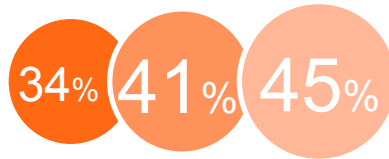
Schedule an appointment/make a reservation



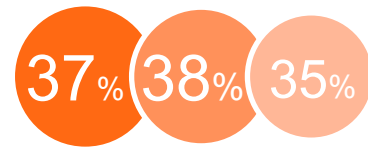
Inquire about or compare pricing



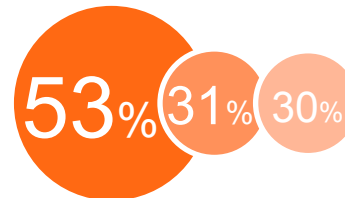
Request more information to be sent to me (e.g., brochure...)



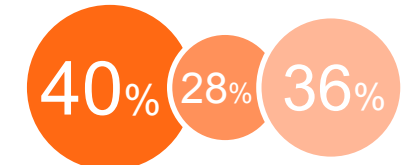
Inquire about or compare specific product/service features



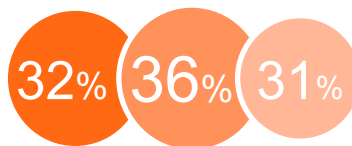
Make a purchase/transaction over the phone



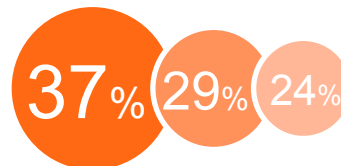
Check for the business's hours



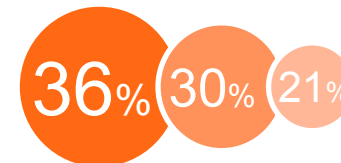
Inquire about/check for promotions, incentives or deals



Inquire about available inventory or services offered



Locate or get directions to a store/business



Get directions/location information

BASE: FINANCE USERS/PURCHASERS

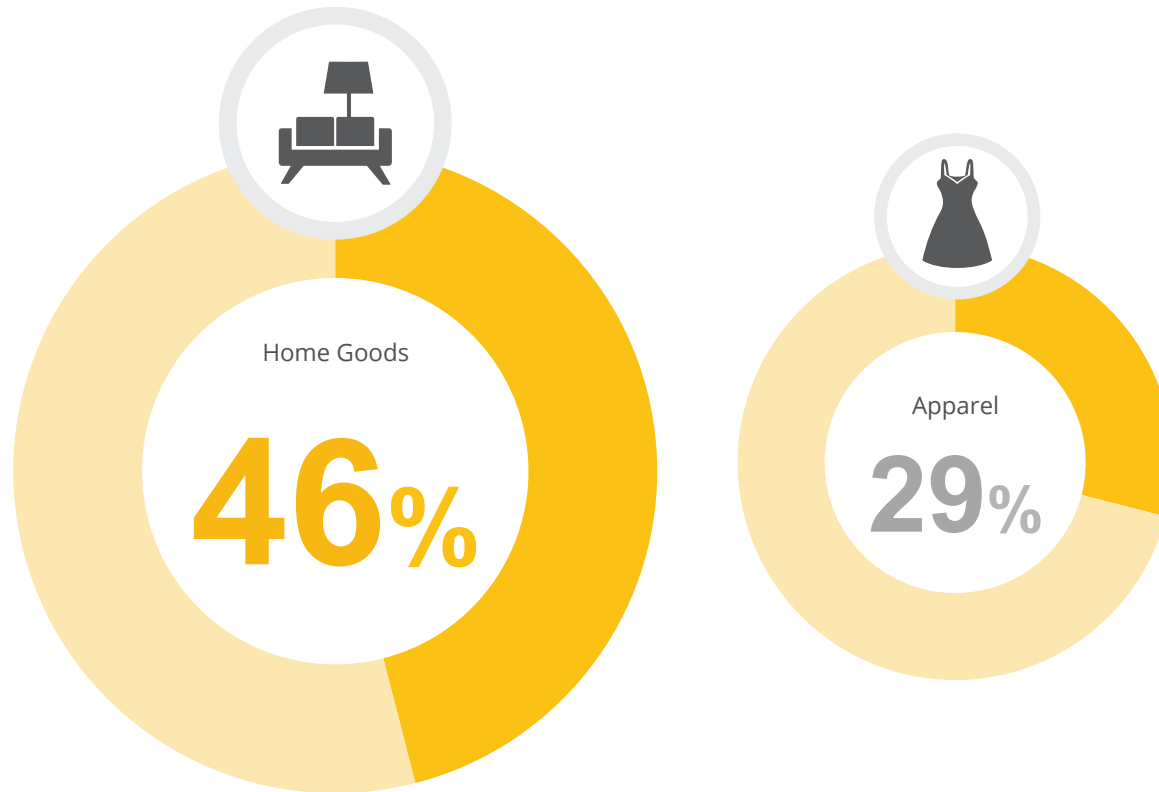
Q10. WHEN THINKING ABOUT ALL OF THE SEARCHES YOU CONDUCT FOR [INSERT SUB-VERTICAL NAME] INFORMATION, WHICH OF THE FOLLOWING ARE REASONS WHY YOU MAY CALL A BUSINESS DIRECTLY? SELECT ALL THAT APPLY.



Retail

CALLS FROM A RETAIL SEARCH ARE THE LEAST LIKELY, BUT ABOUT HALF OF THOSE SEARCHING FOR HOME GOODS WOULD PLACE A CALL

% who would be extremely/very likely to call if the call capability was available in smartphone search

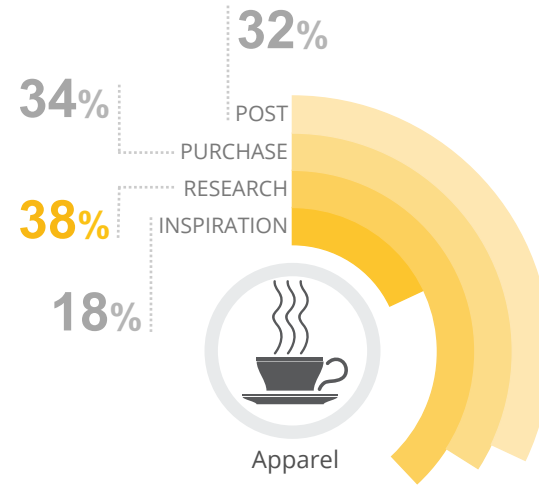
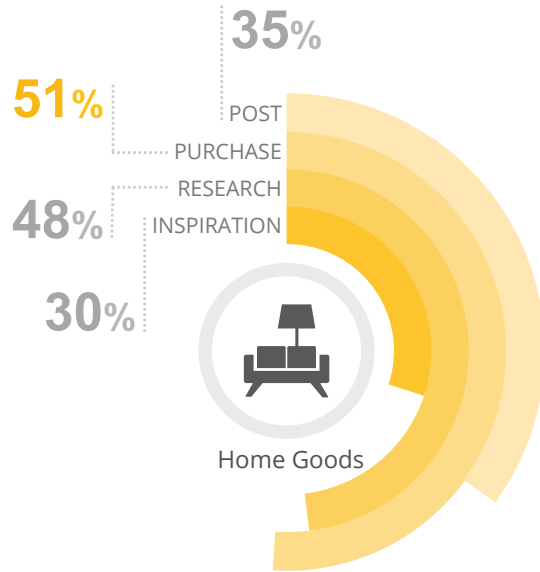


BASE: RETAIL USERS/PURCHASERS
Q8 IS THE FIRST IN THE SET OF QUESTIONS BASED AMONG SUB-VERTICAL QUOTA ASSIGNMENTS.

Q8. IF YOU HAD BEEN CONDUCTING A SEARCH FOR [INSERT SUB-VERTICAL NAME] INFORMATION AND RECEIVED RESULTS ON YOUR SMARTPHONE SIMILAR TO THOSE SHOWN BELOW (BUT RELEVANT TO YOUR LOCATION AND SEARCH), HOW LIKELY WOULD YOU BE TO CALL A BUSINESS? 5PT SCALE FROM "NOT AT ALL LIKELY" TO "EXTREMELY LIKELY"; TOP 2 BOX SHOWN.

THE RESEARCH AND PURCHASE STAGES ARE THE MOST IMPORTANT FOR BEING ABLE TO PLACE A CALL RELATED TO RETAIL

% who find it extremely/very important to be able to call the business during each phase of decision-making



INSPIRATION

The time when you realized you wanted or needed to purchase a retail or technology product; when you started thinking about your purchase or when you were inspired or prompted by an event that you needed to make the purchase for.

RESEARCH

The time when you actively looked and researched your purchase (looking into price, styles, features, etc.)

PURCHASE

The time when you purchased your item or service

POST

Any behavior you may have participated in **after** you purchased your item or service (sharing your experience/photos, recommending to friends or family, writing a review, etc.)

BASE: RETAIL USERS/PURCHASERS

Q9. ASSUMING YOU USED A SEARCH ENGINE ON YOUR SMARTPHONE TO OBTAIN INFORMATION ON [INSERT SUB-VERTICAL NAME], HOW IMPORTANT IS IT FOR YOU TO BE ABLE TO CALL THE BUSINESS DURING EACH OF THESE PHASES OF THE DECISION-MAKING PROCESS? SELECT ONE FOR EACH PHASE. 5PT SCALE OF "NOT AT ALL IMPORTANT" TO "EXTREMELY IMPORTANT"; TOP 2 BOX SHOWN.

CHECKING BUSINESS HOURS OR INQUIRING ABOUT INVENTORY ARE THE TOP REASONS TO CALL A RETAIL STORE

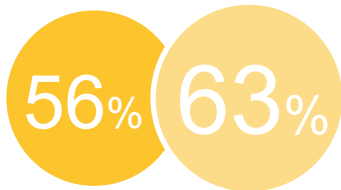


Apparel

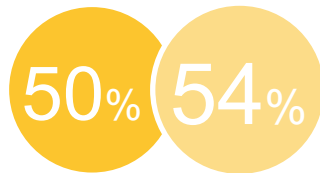


Home Goods

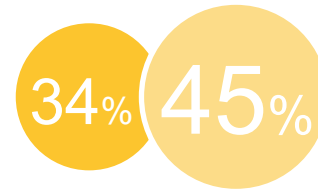
% who may call a business directly from a search for each reason



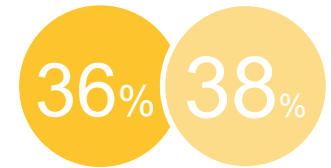
Check for the business's hours



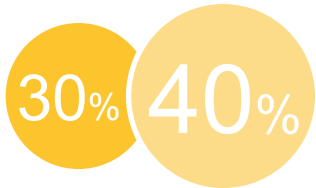
Inquire about available inventory or services offered



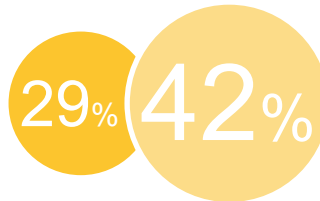
Locate or get directions to a store/business



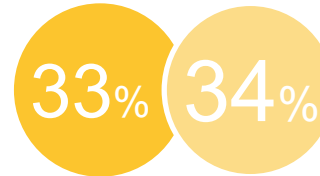
Put an item on hold



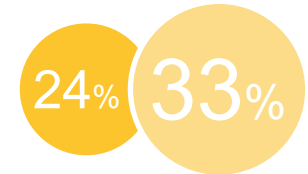
Inquire about or compare pricing



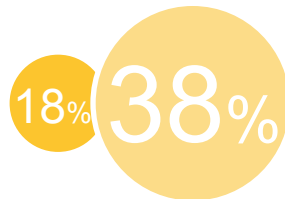
Get directions/location information



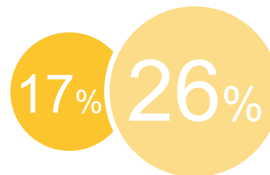
Inquire about/check for promotions, incentives or deals



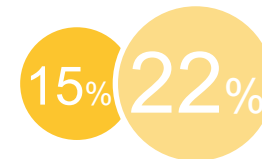
Inquire about or compare specific product/service features



Schedule an appointment/make a reservation



Request more information be sent to me (e.g., brochure, price quote)



Make a purchase/transaction over the phone

BASE: RETAIL USERS/PURCHASERS

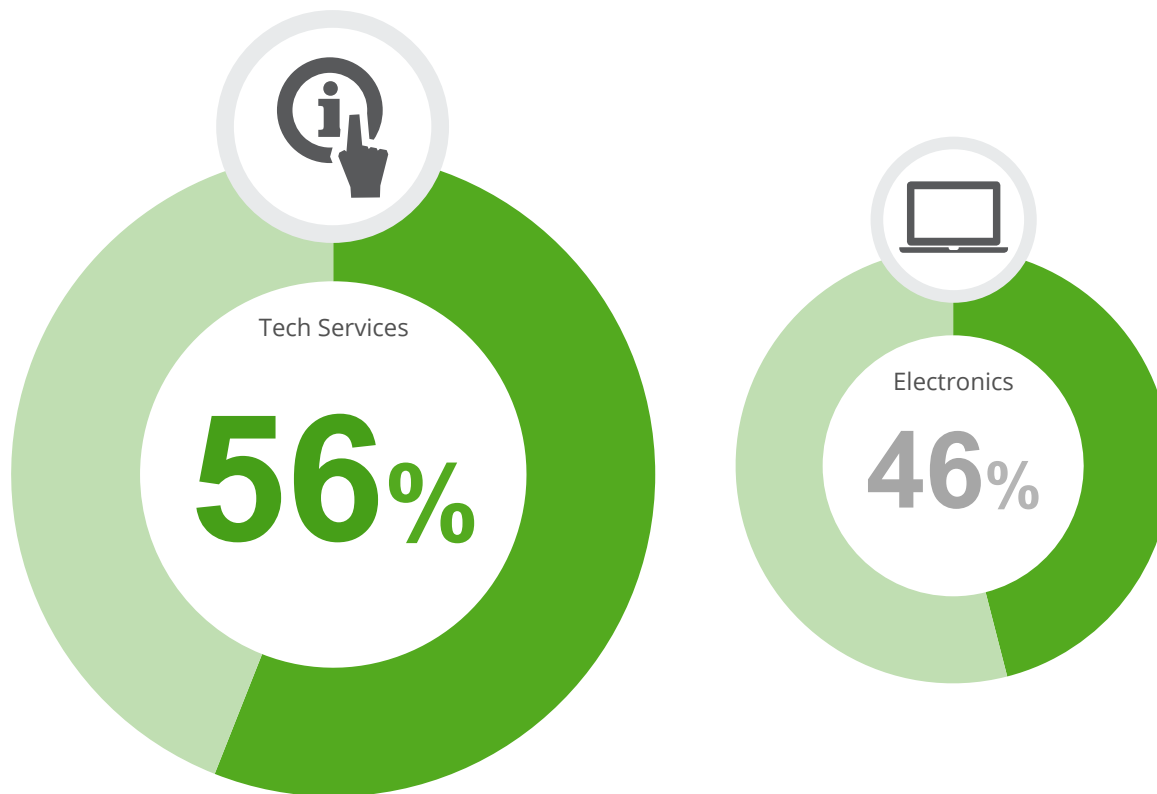
Q10. WHEN THINKING ABOUT ALL OF THE SEARCHES YOU CONDUCT FOR [INSERT SUB-VERTICAL NAME] INFORMATION, WHICH OF THE FOLLOWING ARE REASONS WHY YOU MAY CALL A BUSINESS DIRECTLY? SELECT ALL THAT APPLY.



Technology

ABOUT HALF OF THOSE SEARCHING FOR TECH PRODUCTS/SERVICES WOULD LIKELY PLACE A PHONE CALL

% who would be extremely/very likely to call if the call capability was available in smartphone search

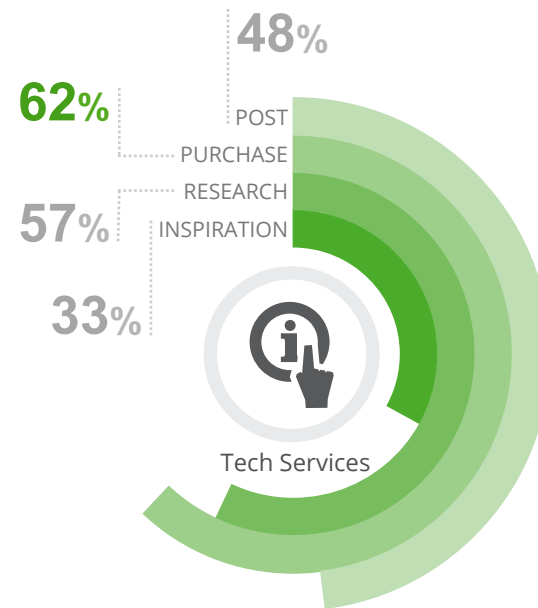
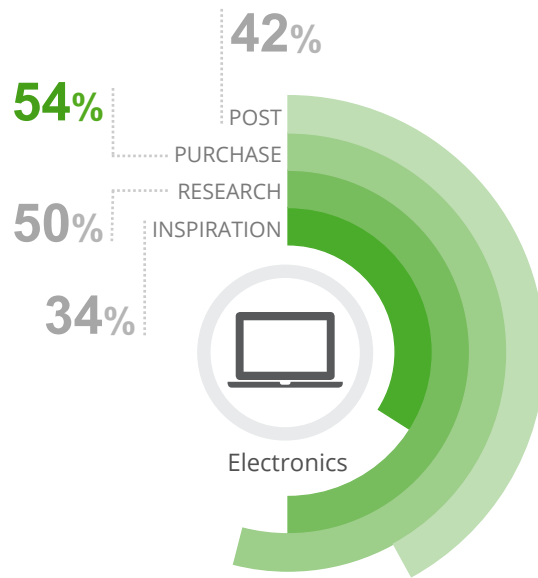


BASE: TECH USERS/PURCHASERS
Q8 IS THE FIRST IN THE SET OF QUESTIONS BASED AMONG SUB-VERTICAL QUOTA ASSIGNMENTS.

Q8. IF YOU HAD BEEN CONDUCTING A SEARCH FOR [INSERT SUB-VERTICAL NAME] INFORMATION AND RECEIVED RESULTS ON YOUR SMARTPHONE SIMILAR TO THOSE SHOWN BELOW (BUT RELEVANT TO YOUR LOCATION AND SEARCH), HOW LIKELY WOULD YOU BE TO CALL A BUSINESS? 5PT SCALE FROM "NOT AT ALL LIKELY" TO "EXTREMELY LIKELY"; TOP 2 BOX SHOWN.

OVER HALF FIND IT VERY IMPORTANT TO PLACE A CALL DURING THE RESEARCH OR PURCHASE PHASES OF A TECH PURCHASE

% who find it extremely/very important to be able to call the business during each phase of decision-making



INSPIRATION

The time when you realized you wanted or needed to purchase a retail or technology product; when you started thinking about your purchase or when you were inspired or prompted by an event that you needed to make the purchase for.

RESEARCH

The time when you actively looked and researched your purchase (looking into price, styles, features, etc.)

PURCHASE

The time when you purchased your item or service

POST

Any behavior you may have participated in **after** you purchased your item or service (sharing your experience/photos, recommending to friends or family, writing a review, etc.)

BASE: TECH USERS/PURCHASERS

Q9. ASSUMING YOU USED A SEARCH ENGINE ON YOUR SMARTPHONE TO OBTAIN INFORMATION ON [INSERT SUB-VERTICAL NAME], HOW IMPORTANT IS IT FOR YOU TO BE ABLE TO CALL THE BUSINESS DURING EACH OF THESE PHASES OF THE DECISION-MAKING PROCESS? SELECT ONE FOR EACH PHASE. 5PT SCALE OF "NOT AT ALL IMPORTANT" TO "EXTREMELY IMPORTANT"; TOP 2 BOX SHOWN.

WITHIN TECH, TECH SERVICES CALLS ARE MORE LIKELY AND ARE PROMPTED BY THE FOLLOWING NEEDS: CHECKING BUSINESS HOURS, INQUIRING ABOUT SERVICES, PRICES, AND PROMOTIONS

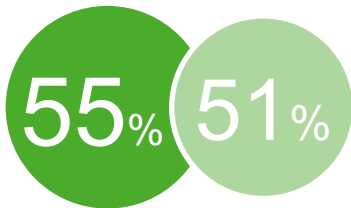


Tech Services

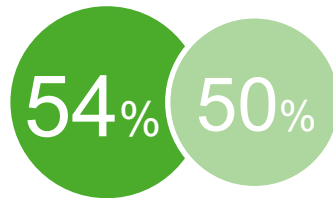


Electronics

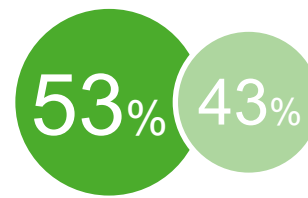
% who may call a business directly from a search for each reason



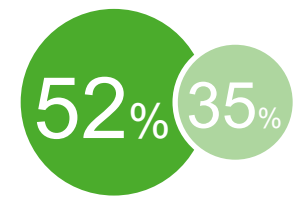
Check for the business's hours



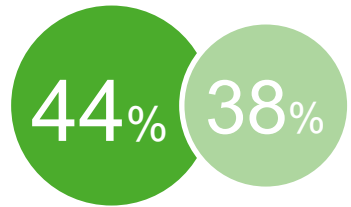
Inquire about available inventory or services offered



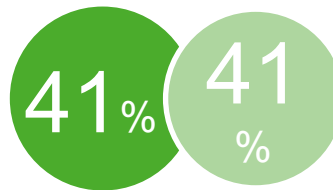
Inquire about or compare pricing



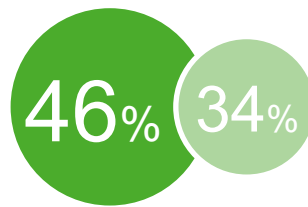
Inquire about/check for promotions, incentives or deals



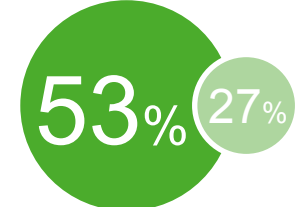
Get directions/location information



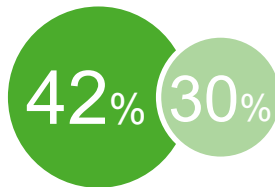
Locate or get directions to a store/business



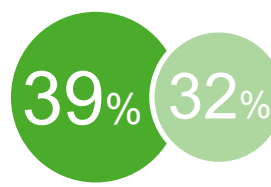
Inquire about or compare specific product/service features



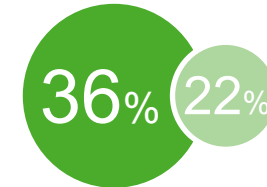
Schedule an appointment/make a reservation



Request more information be sent to me (e.g., brochure, price quote)



Put an item on hold



Make a purchase/transaction over the phone

BASE: TECH USERS/PURCHASERS

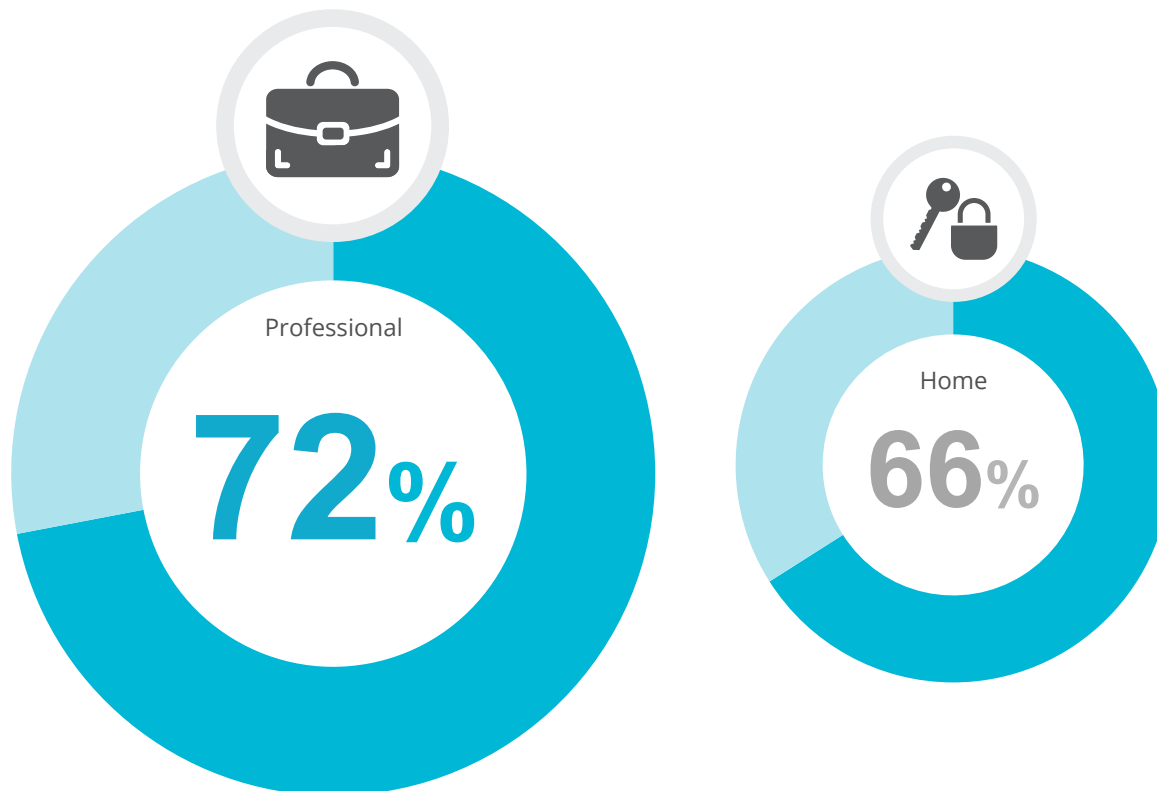
Q10. WHEN THINKING ABOUT ALL OF THE SEARCHES YOU CONDUCT FOR [INSERT SUB-VERTICAL NAME] INFORMATION, WHICH OF THE FOLLOWING ARE REASONS WHY YOU MAY CALL A BUSINESS DIRECTLY? SELECT ALL THAT APPLY.



Local Services

LOCAL SERVICES SEARCHERS HAVE THE HIGHEST LIKELIHOOD TO PLACE A PHONE CALL FROM SEARCH, LED BY PROFESSIONAL SEARCHES

% who would be extremely/very likely to call if the call capability was available in smartphone search

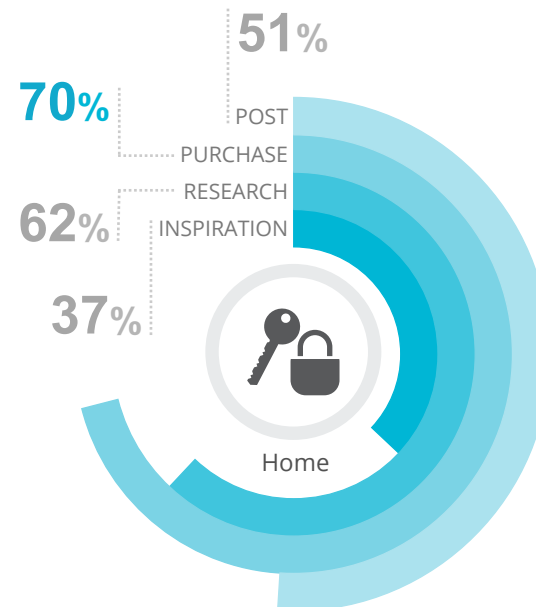
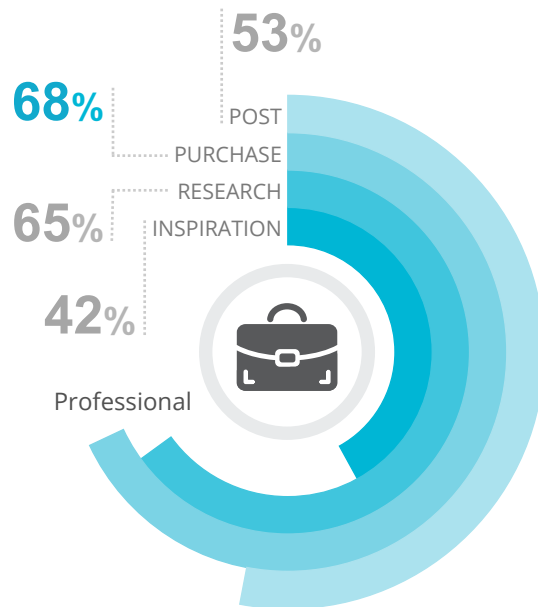


BASE: LOCAL SERVICE USERS/PURCHASERS
Q8 IS THE FIRST IN THE SET OF QUESTIONS BASED AMONG SUB-VERTICAL QUOTA ASSIGNMENTS.

Q8. IF YOU HAD BEEN CONDUCTING A SEARCH FOR [INSERT SUB-VERTICAL NAME] INFORMATION AND RECEIVED RESULTS ON YOUR SMARTPHONE SIMILAR TO THOSE SHOWN BELOW (BUT RELEVANT TO YOUR LOCATION AND SEARCH), HOW LIKELY WOULD YOU BE TO CALL A BUSINESS? 5PT SCALE FROM "NOT AT ALL LIKELY" TO "EXTREMELY LIKELY"; TOP 2 BOX SHOWN.

TWO-THIRDS FIND IT VERY IMPORTANT TO BE ABLE TO PLACE A CALL WHEN RESEARCHING OR PURCHASING LOCAL SERVICES

% who find it extremely/very important to be able to call the business during each phase of decision-making



INSPIRATION

The time when you realized your need for a local service (e.g., real estate, legal, plumber or home service). This is the moment you began dreaming or thinking about your need for a real estate, legal, plumber or home service but had not yet started researching

RESEARCH

The time when you actively looked and researched local services (looking into prices, companies, locations and other service options)

PURCHASE

The time when you committed to paying for your local service

POST

Any behavior you may have participated in after you used your local service (sharing your experience/photos, recommending to friends or family, writing a review, etc.)

BASE: LOCAL SERVICE USERS/PURCHASERS

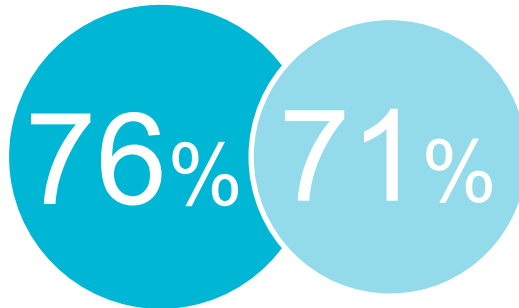
Q9. ASSUMING YOU USED A SEARCH ENGINE ON YOUR SMARTPHONE TO OBTAIN INFORMATION ON [INSERT SUB-VERTICAL NAME], HOW IMPORTANT IS IT FOR YOU TO BE ABLE TO CALL THE BUSINESS DURING EACH OF THESE PHASES OF THE DECISION-MAKING PROCESS? SELECT ONE FOR EACH PHASE. 5PT SCALE OF "NOT AT ALL IMPORTANT" TO "EXTREMELY IMPORTANT"; TOP 2 BOX SHOWN.

THE MOST LIKELY TO REASON TO PLACE A CALL RELATED TO LOCAL SERVICES IS TO SCHEDULE AN APPOINTMENT

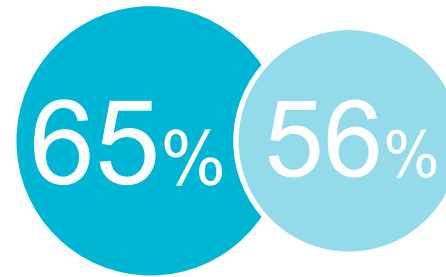
% who may call a business directly from a search for each reason



Professional



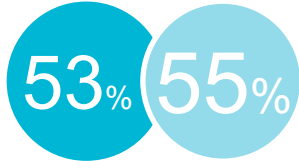
Schedule an appointment/make a reservation



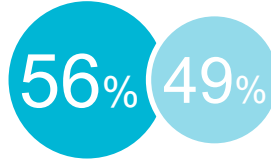
Check for the business's hours



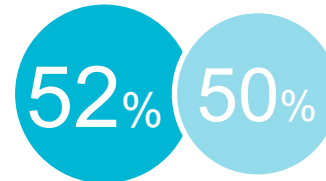
Home



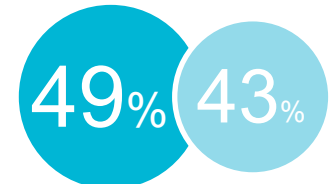
Inquire about or compare pricing



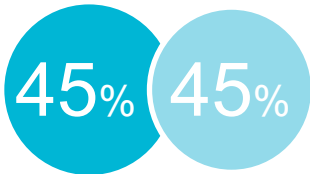
Inquire about available inventory or services offered



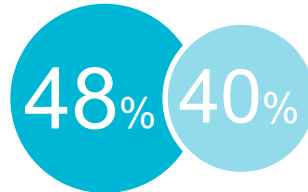
Inquire about or compare specific product/service features



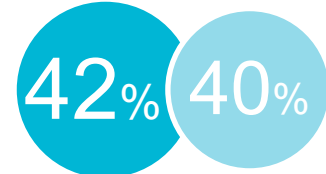
Get directions/location information



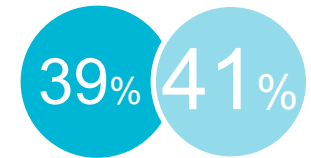
Request more information to be sent to me (e.g., brochure...)



Locate or get directions to a store/business



Inquire about/check for promotions, incentives or deals



Make a purchase/transaction over the phone

BASE: LOCAL SERVICE USERS/PURCHASERS

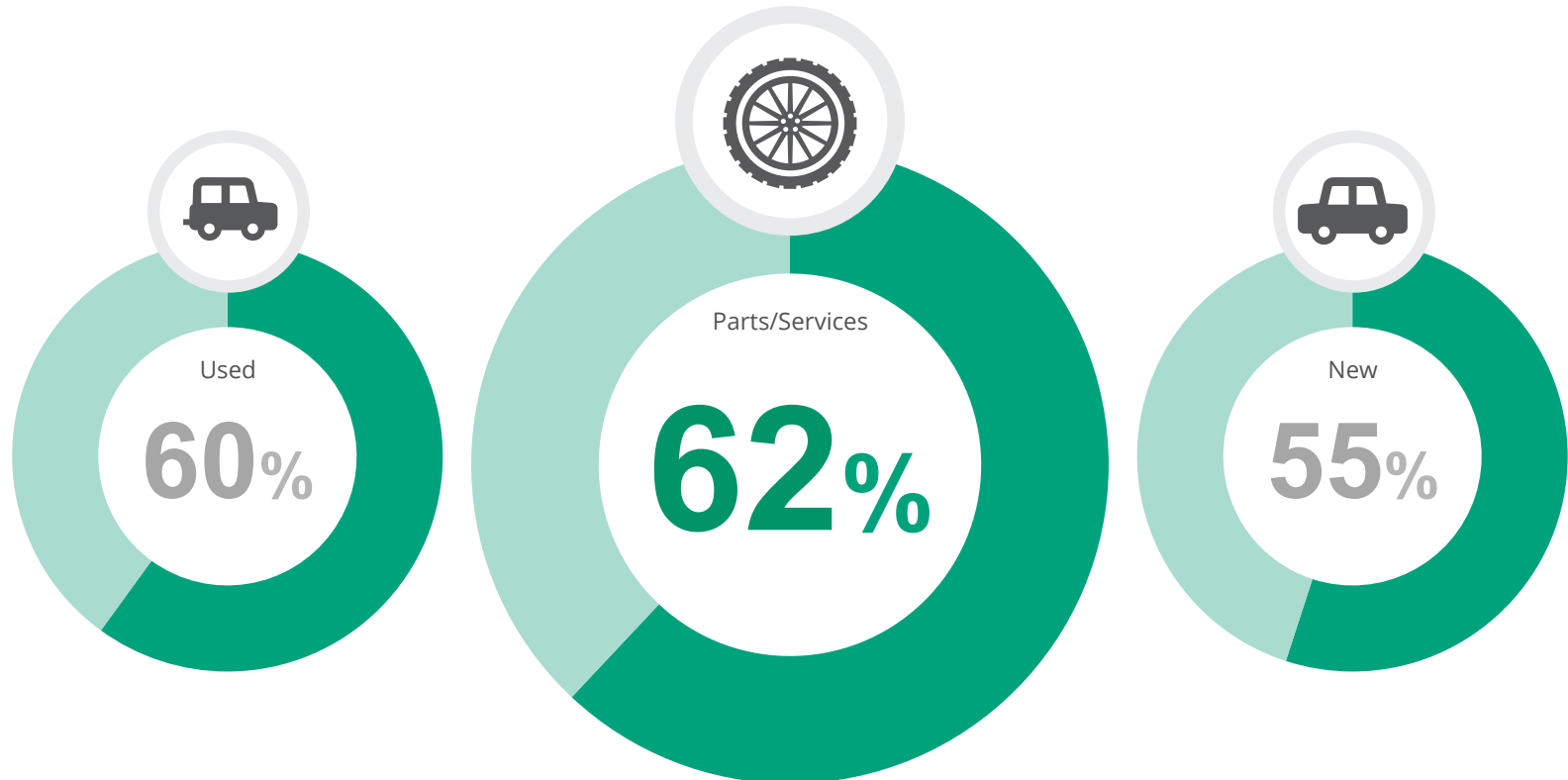
Q10. WHEN THINKING ABOUT ALL OF THE SEARCHES YOU CONDUCT FOR [INSERT SUB-VERTICAL NAME] INFORMATION, WHICH OF THE FOLLOWING ARE REASONS WHY YOU MAY CALL A BUSINESS DIRECTLY? SELECT ALL THAT APPLY.



Auto

OVER HALF OF AUTO SEARCHERS WOULD BE VERY LIKELY TO USE CLICK TO CALL FOR PARTS/SERVICES OR VEHICLES

% who would be extremely/very likely to call if the call capability was available in smartphone search

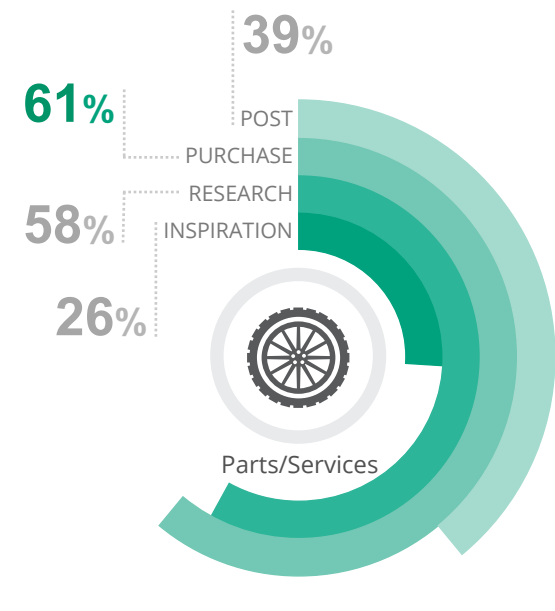
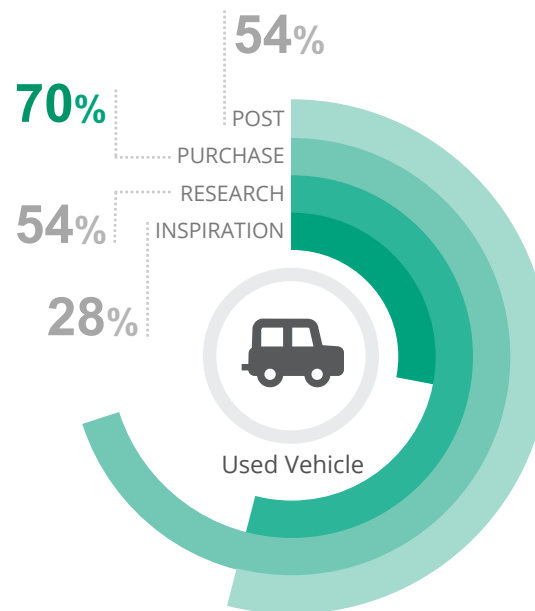
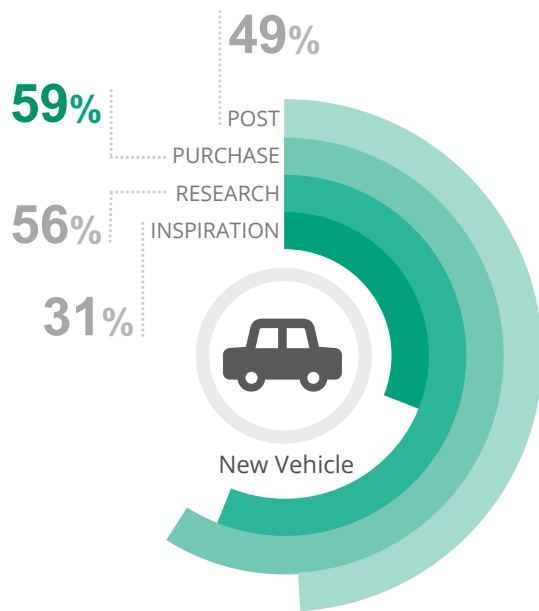


BASE: AUTO USERS/PURCHASERS
Q8 IS THE FIRST IN THE SET OF QUESTIONS BASED AMONG SUB-VERTICAL QUOTA ASSIGNMENTS.

Q8. IF YOU HAD BEEN CONDUCTING A SEARCH FOR [INSERT SUB-VERTICAL NAME] INFORMATION AND RECEIVED RESULTS ON YOUR SMARTPHONE SIMILAR TO THOSE SHOWN BELOW (BUT RELEVANT TO YOUR LOCATION AND SEARCH), HOW LIKELY WOULD YOU BE TO CALL A BUSINESS? 5PT SCALE FROM "NOT AT ALL LIKELY" TO "EXTREMELY LIKELY"; TOP 2 BOX SHOWN.

SEVEN IN TEN FIND IT VERY IMPORTANT TO BE ABLE TO CALL A BUSINESS WHEN PURCHASING A USED VEHICLE – HIGHEST OUT OF ALL AUTO OCCASIONS

% who find it extremely/very important to be able to call the business during each phase of decision-making



INSPIRATION

The time when you realized you needed to purchase a vehicle or automobile part(s) or service(s). This is the moment you began dreaming or thinking about your desire to purchase but had not yet started shopping/researching.

RESEARCH

The time when you actively looked and researched your purchase (looking into price, makes/models, brands, stores, dealerships, etc.)

PURCHASE

The time when you purchased your vehicle, part(s) or service(s). This includes using the device while at the dealer or retailer.

POST

Any behavior you may have participated in **after** you purchased your vehicle, part(s), or service(s) (sharing your experience/photos, recommending to friends or family, writing a review, etc.)

BASE: AUTO USERS/PURCHASERS

Q9. ASSUMING YOU USED A SEARCH ENGINE ON YOUR SMARTPHONE TO OBTAIN INFORMATION ON [INSERT SUB-VERTICAL NAME], HOW IMPORTANT IS IT FOR YOU TO BE ABLE TO CALL THE BUSINESS DURING EACH OF THESE PHASES OF THE DECISION-MAKING PROCESS? SELECT ONE FOR EACH PHASE. 5PT SCALE OF "NOT AT ALL IMPORTANT" TO "EXTREMELY IMPORTANT"; TOP 2 BOX SHOWN.

AUTO SEARCHERS WOULD USE CLICK TO CALL LESS FOR PURCHASES AND MORE TO CHECK HOURS, MAKE APPOINTMENTS, AND ASK ABOUT INVENTORY/SERVICES

% who may call a business directly from a search for each reason



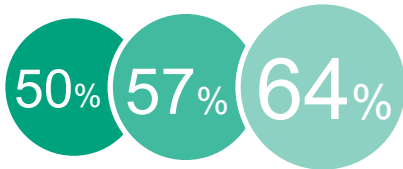
New Vehicle



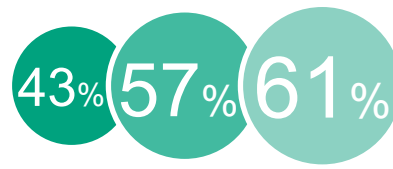
Used Vehicle



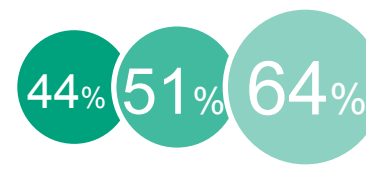
Parts/Services



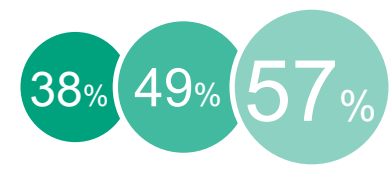
Check for the business's hours



Schedule an appointment/make a reservation



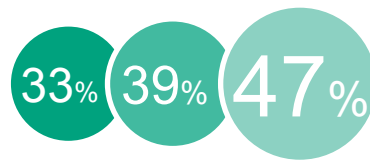
Inquire about available inventory or services offered



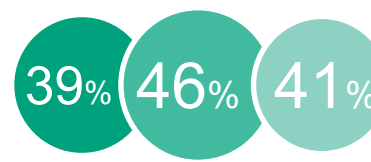
Inquire about or compare pricing



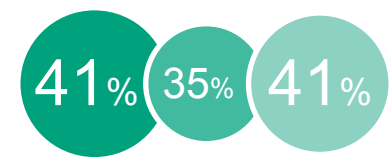
Locate or get directions to a store/business



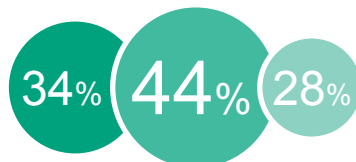
Inquire about or compare specific product/service features



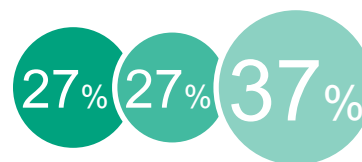
Get directions/location information



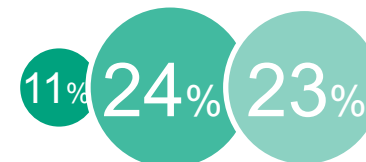
Inquire about/check for promotions, incentives or deals



Request more information to be sent to me (e.g., brochure...)



Put an item on hold



Make a purchase/transaction over the phone

BASE: AUTO USERS/PURCHASERS

Q10. WHEN THINKING ABOUT ALL OF THE SEARCHES YOU CONDUCT FOR [INSERT SUB-VERTICAL NAME] INFORMATION, WHICH OF THE FOLLOWING ARE REASONS WHY YOU MAY CALL A BUSINESS DIRECTLY? SELECT ALL THAT APPLY.

APPENDIX

PHASES OF THE DECISION-MAKING PROCESS

RESTAURANT:

- 1. Inspiration:** When you started thinking about visiting or ordering from a restaurant; when you were inspired by an occasion that would prompt visiting or ordering from a restaurant.
- 2. Research:** The time when you actively looked and researched your restaurant plans (looking into menus, prices, reviews, etc.).
- 3. Purchase/Ordering:** The time when you placed an order for food or beverages at a restaurant.
- 4. Experiencing:** Any behavior you may have participated in **during** your visit or meal (uploading photos, "checking in" at the restaurant via a social network, etc.).
- 5. Post Experience:** Any behavior you may have participated in **after** you bought at a restaurant (sharing your experience/photos, recommending to friends or family, writing a review, etc.).

FINANCE

- 1. Inspiration:** The time when you realized you wanted or needed to make a finance-related transaction or purchase (perhaps prompted or triggered by a specific event). This is the moment you began dreaming or thinking about your desire to transact or purchase but had not yet started shopping/researching.
- 2. Research:** The time when you actively looked and researched your account or financial transaction/purchase (looking into price, interest rates, services, etc.).
- 3. Purchase:** The time when you opened your account or made a financial transaction/purchase. This includes using the device while at a bank or financial institution.
- 5. Post Purchase:** Any behavior you may have participated in **after** you opened your account or made a financial transaction/purchase (sharing your experience, recommending to friends or family, writing a review, etc.).

AUTO

- 1. Inspiration:** The time when you realized you needed to purchase a vehicle or automobile part(s) or service(s). This is the moment you began dreaming or thinking about your desire to purchase but had not yet started shopping/researching.
- 2. Research:** The time when you actively looked and researched your purchase (looking into price, makes/models, brands, stores, dealerships, etc.).
- 3. Purchase:** The time when you purchased your vehicle, part(s) or service(s). This includes using the device while at the dealer or retailer.
- 5. Post Purchase:** Any behavior you may have participated in **after** you purchased your vehicle, part(s), or service(s) (sharing your experience/photos, recommending to friends or family, writing a review, etc.).

LOCAL

- 1. Inspiration:** The time when you realized your need for a local service (e.g., real estate, legal, plumber or home service). This is the moment you began dreaming or thinking about your need for a real estate, legal, plumber or home service but had not yet started researching.
- 2. Research:** The time when you actively looked and researched local services (looking into prices, companies, locations and other service options).
- 3. Purchase:** The time when you committed to paying for your local service.
- 5. Post Purchase:** Any behavior you may have participated in **after** you used your local service (sharing your experience/photos, recommending to friends or family, writing a review, etc.).

TRAVEL

- 1. Inspiration:** The time when you identified you wanted or needed to book travel; when you started thinking about taking a trip or when you were inspired or prompted by an event that you needed to attend.
- 2. Research:** The time when you actively looked and researched your trip or travel plans (looking into destinations, prices, travel times, etc.).
- 3. Purchase/Booking:** The time when you booked your trip
- 4. Experiencing/Traveling:** Any behavior you may have participated in **during** your trip (looking for a restaurant, uploading photos, status messaging about your trip, etc.).
- 5. Post Traveling:** Any behavior you may have participated in **after** you took your trip (sharing your experience/photos, recommending to friends or family, writing a review, etc.).

RETAIL/TECH

- 1. Inspiration:** The time when you realized you wanted or needed to purchase a retail or technology product; when you started thinking about your purchase or when you were inspired or prompted by an event that you needed to make the purchase for.
- 2. Research:** The time when you actively looked and researched your purchase (looking into price, styles, features, etc.).
- 3. Purchase:** The time when you purchased your item or service.
- 5. Post Purchase:** Any behavior you may have participated in **after** you purchased your item or service (sharing your experience/photos, recommending to friends or family, writing a review, etc.).

