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”

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Always</td>
<td>12%</td>
</tr>
<tr>
<td>Frequently</td>
<td>39%</td>
</tr>
<tr>
<td>Sometimes</td>
<td>35%</td>
</tr>
<tr>
<td>Rarely</td>
<td>12%</td>
</tr>
<tr>
<td>Never</td>
<td>2%</td>
</tr>
</tbody>
</table>

**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 directly call a business from the mobile search results?

SPT scale from “Never” to “Always”; Top 2 box shown.
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.

**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

- Local Services: 69%
- Auto: 60%
- Tech: 51%
- Travel: 49%
- Finance: 47%
- Restaurant: 44%
- Retail: 37%

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

- To quickly get an answer/accomplish my goal: 59%
- To talk to a real person: 57%
- I have more questions or need more information than a website can answer: 54%
- To accomplish something that can't be done through the business's website: 44%
- To get more accurate information than can be found from other sources: 43%
- It's convenient: 42%
- The product or service is expensive, and therefore a conversation is required: 12%

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

- Check for business hours: 52%
- Schedule an appointment/make a reservation: 51%
- Inquire about inventory/availability/booking information: 47%
- Inquire about or compare pricing: 43%
- Inquire about/check for promotions, incentives or deals: 39%
- Get directions/local information: 39%
THE TASKS ACCOMPLISHED VIA CLICK TO CALL VARY BY INDUSTRY

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

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

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

- **INSPIRATION**: The time when you realized you needed to purchase
  - 30%

- **RESEARCH**: The time when you actively looked and researched your purchase
  - 52%

- **PURCHASE**: The time when you purchased
  - 61%

- **POST**: Any behavior you may have participated in after you purchased
  - 40%

**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 phase of the decision-making process? Select one for each phase. SPT scale of "NOT AT ALL IMPORTANT" to "EXTREMELY IMPORTANT"; top 2 box shown.

[Click to call function icon]
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

31% Call frequently

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Always</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Frequently</td>
<td>39%</td>
<td></td>
</tr>
<tr>
<td>Sometimes</td>
<td>41%</td>
<td></td>
</tr>
<tr>
<td>Rarely</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>Never</td>
<td>4%</td>
<td></td>
</tr>
</tbody>
</table>
PRICE IS AN IMPORTANT FACTOR IN DETERMINING WHETHER A CONSUMER PREFERENCES TO CALL BEFORE MAKING A PURCHASE

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Price Point</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUTO</td>
<td>$1,195</td>
</tr>
<tr>
<td>FINANCE</td>
<td>$416</td>
</tr>
<tr>
<td>TRAVEL</td>
<td>$320</td>
</tr>
<tr>
<td>TECH</td>
<td>$265</td>
</tr>
<tr>
<td>LOCAL</td>
<td>$170</td>
</tr>
<tr>
<td>RETAIL</td>
<td>$119</td>
</tr>
<tr>
<td>RESTAURANT</td>
<td>$33</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Statement</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>More likely to explore other brands</td>
<td>47%</td>
</tr>
<tr>
<td>Frustrated or annoyed</td>
<td>47%</td>
</tr>
<tr>
<td>Disappointed in the brand or company</td>
<td>35%</td>
</tr>
<tr>
<td>It doesn't affect how I view the brand/company</td>
<td>34%</td>
</tr>
<tr>
<td>Less likely to use the brand/company in future</td>
<td>33%</td>
</tr>
<tr>
<td>Less likely to recommend the brand/co.</td>
<td>33%</td>
</tr>
<tr>
<td>Less trusting of the brand or company</td>
<td>27%</td>
</tr>
</tbody>
</table>

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:

- Restaurant: 2.9 minutes
- Retail: 3.8 minutes
- Tech: 4.3 minutes
- Local: 4.4 minutes
- Auto: 4.8 minutes
- Travel: 4.8 minutes
- Finance: 5.3 minutes

Overall average call length: 4.4 minutes

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

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

SOURCE: GOOGLE INTERNAL DATA
On average, 40 million calls are driven by Google ads each month.
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

- Hotel: 58%
- Car: 60%
- Airline: 30%

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

**Car**
- INSPIRATION: 35%
- RESEARCH: 49%
- PURCHASE: 26%
- EXPERIENCE: 43%
- POST: 25%

**Hotel**
- INSPIRATION: 51%
- RESEARCH: 42%
- PURCHASE: 22%
- EXPERIENCE: 45%
- POST: 38%

**Airline**
- INSPIRATION: 62%
- RESEARCH: 56%
- PURCHASE: 22%
- EXPERIENCE: 57%
- POST: 38%

**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**
  - Schedule an appointment/make a reservation: 44%
  - Inquire about/check for promotions, incentives or deals: 39%
  - Make a purchase/transaction over the phone: 41%
  - Locate or get directions to a store/business: 37%

- **Hotel**
  - Schedule an appointment/make a reservation: 52%
  - Inquire about/check for promotions, incentives or deals: 50%
  - Get directions/location information: 52%
  - Inquire about or compare specific product/service features: 35%

- **Airline**
  - Schedule an appointment/make a reservation: 65%
  - Inquire about booking or itinerary information: 46%
  - Check for the business's hours: 41%
  - Request more information to be sent to me (e.g., brochure...): 32%

- **Make changes to my reservation/booking**
  - 55%

- **Inquire about or compare pricing**
  - 66%

- **Locate or get directions to a store/business**
  - 20%

- **Check or redeem loyalty program points/frequent flier miles, etc.**
  - 27%

**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.**

BASE: TRAVEL USERS/PURCHASERS
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

- Quick Service: 49%
- Fine Dining: 38%

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.)

**Fine Dining**
- Inspiration: 30%
- Research: 56%
- Purchase: 28%
- Experience: 24%
- Post: 39%

**Quick Service**
- Inspiration: 23%
- Research: 64%
- Purchase: 28%
- Experience: 24%
- Post: 28%

**BASE:** RESTAURANT 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 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**
  - Schedule an appointment/make a reservation: 37%
  - Inquire about reservation availability, menus: 43%
  - Locate or get directions to a store/business: 41%
  - Inquire about/check for promotions, incentives or deals: 42%
  - Check for the business's hours: 60%
  - Make a purchase/transaction over the phone: 60%

- **Fine Dining**
  - Schedule an appointment/make a reservation: 58%
  - Inquire about reservation availability, menus: 54%
  - Locate or get directions to a store/business: 38%
  - Inquire about/check for promotions, incentives or deals: 32%
  - Check for the business's hours: 58%
  - Make a purchase/transaction over the phone: 30%
  - Get directions/location information: 43%
  - Request more information be sent to me (e.g., brochure, price quote): 42%

**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
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.

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

- Bank Account: 58%
- Investment: 45%
- Insurance: 41%

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.

- **Bank**: 66%
- **Investment**: 68%
- **Insurance**: 38%

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

- **Bank**: 57%
- **Investment**: 46%
- **Insurance**: 34%

**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.

- **Bank**: 60%
- **Investment**: 50%
- **Insurance**: 27%

**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.).

- **Bank**: 58%
- **Investment**: 53%
- **Insurance**: 45%

*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. 5 PT 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**
  - Make changes to my account: 55%
  - Schedule an appointment/make a reservation: 51%
  - Inquire about or compare pricing: 40%
  - Request more information to be sent to me (e.g., brochure...): 38%
  - Inquire about or compare specific product/service features: 34%
  - Make a purchase/transaction over the phone: 37%
  - Check for the business's hours: 53%
  - Inquire about/check for promotions, incentives or deals: 40%
  - Inquire about available inventory or services offered: 32%
  - Locate or get directions to a store/business: 37%
  - Get directions/location information: 36%

- **Investment**
  - Make changes to my account: 61%
  - Schedule an appointment/make a reservation: 57%
  - Inquire about or compare pricing: 34%
  - Request more information to be sent to me (e.g., brochure...): 44%
  - Inquire about or compare specific product/service features: 41%
  - Make a purchase/transaction over the phone: 38%
  - Check for the business's hours: 31%
  - Inquire about/check for promotions, incentives or deals: 28%
  - Inquire about available inventory or services offered: 36%
  - Locate or get directions to a store/business: 29%
  - Get directions/location information: 30%

- **Insurance**
  - Make changes to my account: 53%
  - Schedule an appointment/make a reservation: 41%
  - Inquire about or compare pricing: 54%
  - Request more information to be sent to me (e.g., brochure...): 49%
  - Inquire about or compare specific product/service features: 45%
  - Make a purchase/transaction over the phone: 35%
  - Check for the business's hours: 30%
  - Inquire about/check for promotions, incentives or deals: 36%
  - Inquire about available inventory or services offered: 31%
  - Locate or get directions to a store/business: 24%
  - Get directions/location information: 21%

**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:

- **Home Goods**: 46%
- **Apparel**: 29%

**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 boxes 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.)

- **Home Goods**:
  - Inspiration: 51%
  - Research: 48%
  - Purchase: 30%
  - Post: 35%

- **Apparel**:
  - Inspiration: 32%
  - Research: 34%
  - Purchase: 38%
  - Post: 18%
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.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Apparel %</th>
<th>Home Goods %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check for the business's hours</td>
<td>56%</td>
<td>36%</td>
</tr>
<tr>
<td>Inquire about available inventory or services offered</td>
<td>50%</td>
<td>54%</td>
</tr>
<tr>
<td>Locate or get directions to a store/business</td>
<td>34%</td>
<td>45%</td>
</tr>
<tr>
<td>Put an item on hold</td>
<td>36%</td>
<td>38%</td>
</tr>
<tr>
<td>Inquire about or compare pricing</td>
<td>30%</td>
<td>40%</td>
</tr>
<tr>
<td>Get directions/location information</td>
<td>29%</td>
<td>42%</td>
</tr>
<tr>
<td>Inquire about/check for promotions, incentives or deals</td>
<td>33%</td>
<td>34%</td>
</tr>
<tr>
<td>Inquire about or compare specific product/service features</td>
<td>24%</td>
<td>33%</td>
</tr>
<tr>
<td>Schedule an appointment/make a reservation</td>
<td>18%</td>
<td>38%</td>
</tr>
<tr>
<td>Request more information be sent to me (e.g., brochure, price quote)</td>
<td>17%</td>
<td>26%</td>
</tr>
<tr>
<td>Make a purchase/transaction over the phone</td>
<td>15%</td>
<td>22%</td>
</tr>
</tbody>
</table>
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

Tech Services: 56%
Electronics: 46%

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 FACES OF A TECH PURCHASE

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

**Electronics**
- Inspiration: 34%
- Research: 50%
- Purchase: 54%
- Post: 42%

**Tech Services**
- Inspiration: 33%
- Research: 57%
- Purchase: 62%
- Post: 48%

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

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.

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

- **Tech Services**
  - Check for the business's hours: 55%
  - Inquire about available inventory or services offered: 54%
  - Get directions/location information: 44%
  - Locate or get directions to a store/business: 41%
  - Request more information be sent to me (e.g., brochure, price quote): 42%
  - Make a purchase/transaction over the phone: 36%

- **Electronics**
  - Inquire about or compare pricing: 53%
  - Inquire about/check for promotions, incentives or deals: 52%
  - Inquire about or compare specific product/service features: 46%
  - Schedule an appointment/make a reservation: 53%
  - Put an item on hold: 36%
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

Professional: 72%
Home: 66%

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.
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 phase of the decision-making process? Select one for each phase. 5pt scale of "Not at all important" to "Extremely important"; 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.
  - Professional: 68%
  - Home: 42%

- **Research**: The time when you actively looked and researched local services (looking into prices, companies, locations and other service options).
  - Professional: 65%
  - Home: 37%

- **Purchase**: The time when you committed to paying for your local service.
  - Professional: 53%
  - Home: 70%

- **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.).
  - Professional: 62%
  - Home: 51%

Base: Local service users/purchasers
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: 76%
  - Inquire about or compare pricing: 53%
  - Request more information to be sent to me: 45%

- **Home**
  - Check for the business's hours: 65%
  - Inquire about available inventory or services offered: 56%
  - Locate or get directions to a store/business: 48%

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**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.**

- **Schedule an appointment/make a reservation**
  - Professional: 76%
  - Home: 65%

- **Inquire about or compare pricing**
  - Professional: 53%
  - Home: 56%

- **Request more information to be sent to me**
  - Professional: 45%
  - Home: 48%

- **Locate or get directions to a store/business**
  - Professional: 45%
  - Home: 40%

- **Inquire about available inventory or services offered**
  - Professional: 56%
  - Home: 52%

- **Inquire about/check for promotions, incentives or deals**
  - Professional: 42%
  - Home: 40%

- **Get directions/location information**
  - Professional: 55%
  - Home: 49%

- **Make a purchase/transaction over the phone**
  - Professional: 43%
  - Home: 41%
Auto
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 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

- **Used**
  - 60%

- **Parts/Services**
  - 62%

- **New**
  - 55%
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

**New Vehicle**
- Inspiration: 59%
- Research: 70%
- Purchase: 61%
- Post-Purchase: 39%

**Used Vehicle**
- Inspiration: 56%
- Research: 54%
- Purchase: 58%
- Post-Purchase: 28%

**Parts/Services**
- Inspiration: 31%
- Research: 28%
- Purchase: 61%
- Post-Purchase: 26%

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**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-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.)

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

- **Check for the business's hours**: New Vehicle 50%, Used Vehicle 57%, Parts/Services 64%
- **Schedule an appointment/make a reservation**: New Vehicle 43%, Used Vehicle 57%, Parts/Services 61%
- **Inquire about available inventory or services offered**: New Vehicle 44%, Used Vehicle 51%, Parts/Services 64%
- **Inquire about or compare pricing**: New Vehicle 38%, Used Vehicle 49%, Parts/Services 57%
- **Locate or get directions to a store/business**: New Vehicle 41%, Used Vehicle 50%, Parts/Services 43%
- **Inquire about or compare specific product/service features**: New Vehicle 33%, Used Vehicle 39%, Parts/Services 47%
- **Get directions/location information**: New Vehicle 39%, Used Vehicle 46%, Parts/Services 41%
- **Inquire about/check for promotions, incentives or deals**: New Vehicle 41%, Used Vehicle 35%, Parts/Services 41%
- **Request more information to be sent to me (e.g., brochure...)**: New Vehicle 34%, Used Vehicle 44%, Parts/Services 28%
- **Put an item on hold**: New Vehicle 27%, Used Vehicle 27%, Parts/Services 37%
- **Make a purchase/transaction over the phone**: New Vehicle 11%, Used Vehicle 24%, Parts/Services 23%

*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.*
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: The time when you placed an order for food or beverages at a restaurant; when you purchased your item or service.
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.
4. Experiencing: The time when you actively looked and researched local services (looking into prices, companies, locations and other service options).
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.
4. 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.
4. 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.
4. 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.).