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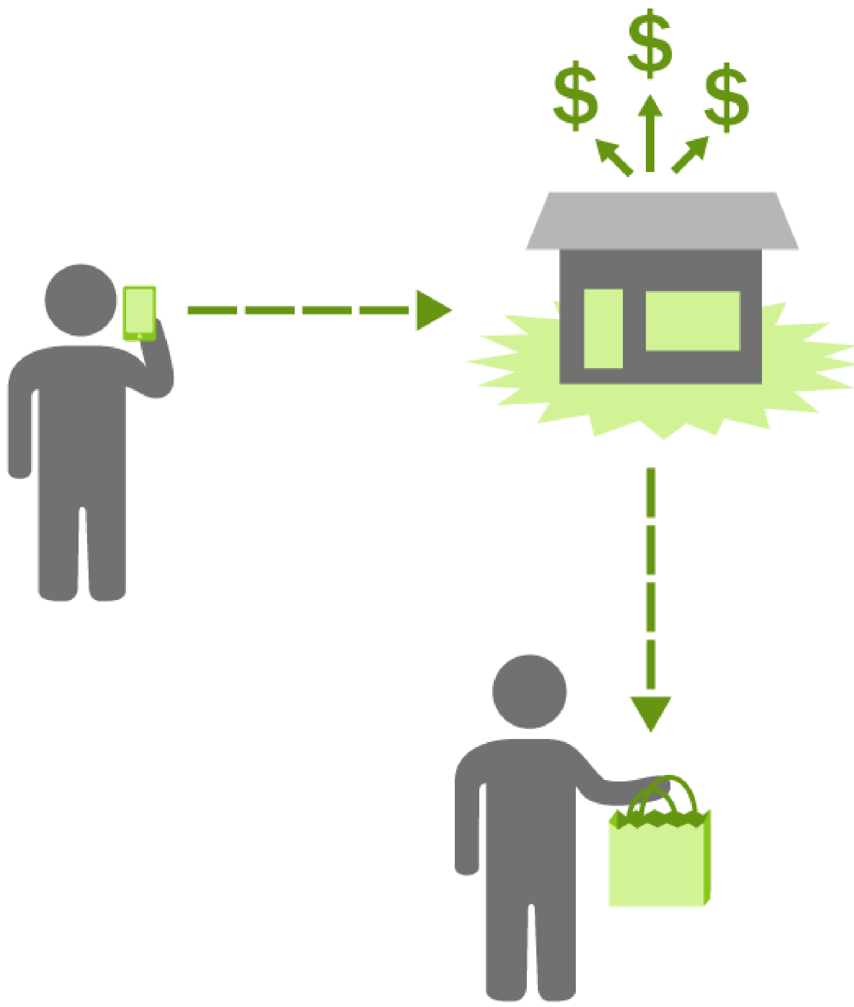
PHONE CALLS ARE THE NEW CLICK: The True SMB Marketing Opportunity

April 2014



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Executive Summary

The U.S. small business (SMB) advertising opportunity is huge. According to BIA/Kelsey, $89 billion is spent annually on advertising by SMBs. This is evolving quickly with location-aware media such as mobile, and the commercially-geared user intent that comes with it.

This opportunity is counterbalanced by significant challenges however. Though large, the SMB segment is characterized by a fragmented customer base that has low technical sophistication. Simplicity and clear ROI are vital to sell to and retain their business.

In addition, SMBs generally have small budgets and little time to manage or monitor marketing campaigns. For all of these reasons, the sophisticated and more complex digital marketing products sold to larger enterprise and national brands don't often work for SMBs.

This has led to difficult advertiser acquisition and high churn for SMB-focused digital marketing products. For example, search – once positioned as the "performance-based" Holy Grail for SMBs – has proven to be too complex for most SMBs to handle on their own.

That's compounded by the fact that most local commerce takes place offline, but is increasingly influenced online. The gap between online and offline however causes a lack of clear causality between clicks/impressions and conversions, thus lowering perceived ROI.

As a result, we've seen a movement towards more tangible and simple lead sources such as foot traffic and phone calls. BIA Kelsey data indicate this is especially true in high-value local verticals such as auto and home services, which close most business by phone.

The smartphone revolution has further boosted the trend towards calls as a lead source. The device's inherent capabilities (native dialer) and common use case for high-immediacy local search make it seamless for ready-to-buy consumers to call local merchants.

Therefore, SMBs that can effectively get in front of consumers with the right messaging and calls to action (e.g., call a business) can achieve high ROI on ad spend and drive high quality leads. Companies that can help them get there are likewise well positioned.

This is only half the battle though. Also needed are effective tracking and analytics to empirically communicate ROI. Developers are building tools to help advertisers attribute campaign effectiveness and optimize and iterate campaigns and operations accordingly.

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The state of call tracking and analytics continues to develop in lots of ways including location targeted ad placements, call recording, keyword tracking and sentiment analysis. These will be ripe areas for development as call monetization continues to evolve.

This report examines opportunities in call monetization for SMBs, and agents operating on their behalf. What's being done today? What are best practices? What's still missing? And where will value be unlocked in the coming months? The phone call is the new click.

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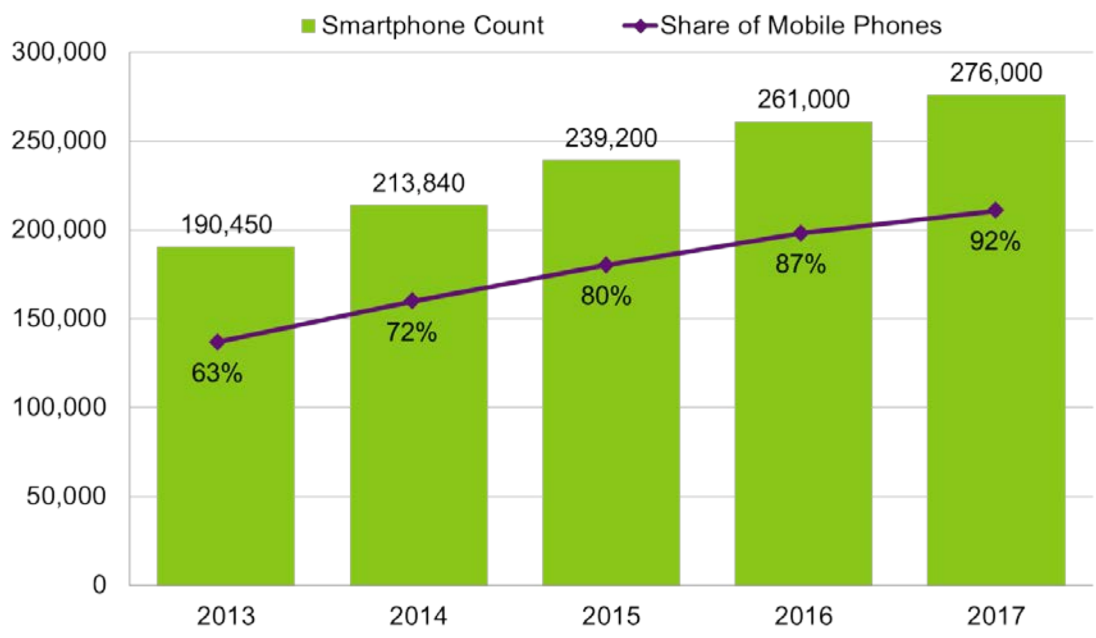
The Age of Smartphones

Over the past half-decade, no other area of technology or media has captured more interest, investment and airtime than mobile innovation. Since the iPhone's 2007 introduction, smartphone penetration has catapulted to 63 percent of U.S. mobile subscribers.

Figure 1 - BIA/Kelsey Projection: US Smartphone Penetration



BIA/Kelsey, 2013

In this age of smartphones, user behavior is quickly evolving along with device capabilities. The portable and location aware nature of smartphones means mobile users more often than not are on the go. And on the go consumers have naturally higher degrees of immediate commercial intent than at-home "lean back" desktop searchers.

For example with search engines, a leading venue for mobile user engagement, BIA/Kelsey forecast data indicate that 25 percent of overall search queries are now on mobile devices. Furthermore, 50 percent of those search queries have "local intent."

That means that mobile searchers have a high likelihood of wanting something to do, see, eat or buy in their immediate local vicinity. By comparison, only 20 percent of desktop searches include local intent.

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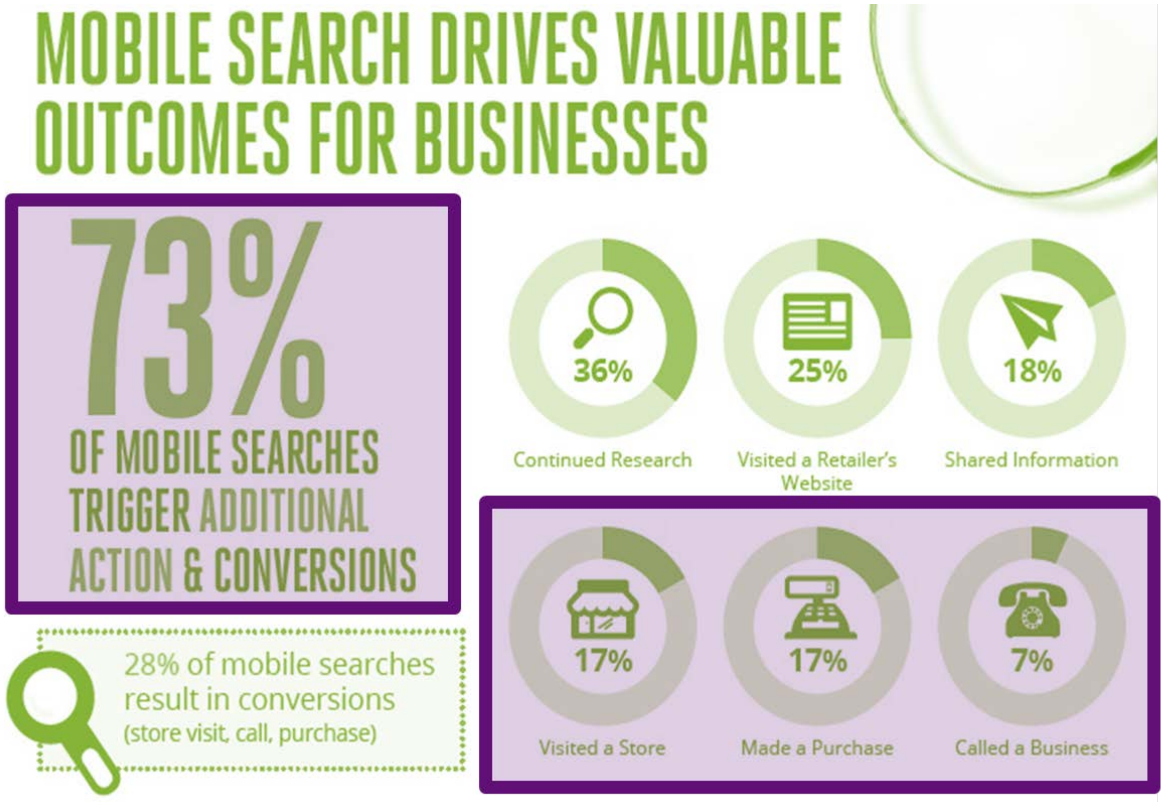
Figure 2 - Proof Points



Google, 2013

This unfolds in various ways: Google reports that 73 percent of mobile searches result in additional actions and conversions. These include things like calling a business, visiting a store or buying something – all very local or proximity-based actions.

Equally interesting is that 55 percent of those conversions occur within an hour of the initial search, clear evidence that mobile users are high-intent, "lower funnel" consumers.

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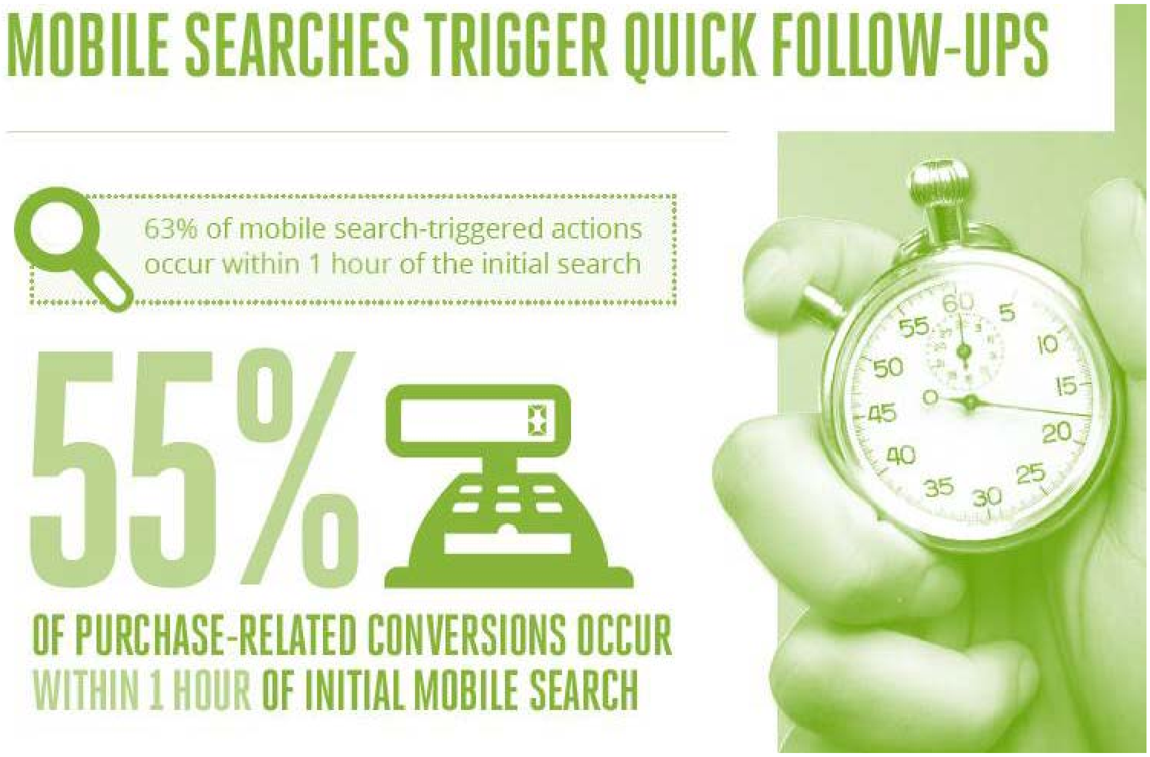
Figure 3 - Mobile Searches Trigger Quick Follow-Ups



Google, 2013

One more statistic: Despite the excitement and media attention ecommerce has generated over the past decade, it only accounts for about 7 percent of U.S. retail spending. The rest occurs offline, in most cases within 10-15 miles of one's home.

Online and mobile are increasingly used by consumers to find offline items and services. Online and mobile *influenced* offline shopping now represents $1.4 trillion in the U.S (Forrester Research, 2012).

Figure 4 - The Online-to-Offline Factor

Forrester Research, 2012

Local Calls to Action

These data point to the need to influence high-intent mobile consumers at key decision making stages. For example, it's vital to meet their high buying intent half way by providing the right calls to action to capture it.

This sounds obvious but isn't happening on a large scale. Many mobile publishers, developers or advertisers operate in a desktop mindset by delivering more branding-oriented advertising such as display ads without local calls to action.

However, the mobile advertising world is starting to come around, led by innovative ad tech companies (xAd for example). Due to the mobile device's high user intent and its ability to capture many inputs and "signals," ad effectiveness is being measured more than ever.

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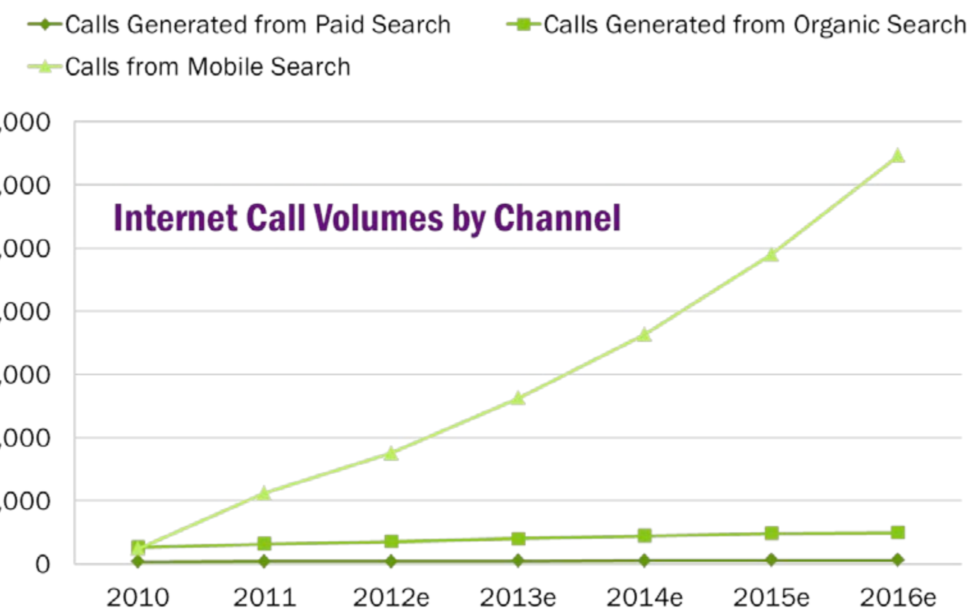
This has led to the art of *attribution*[1]. It takes many forms such as tracking whether someone showed up at a store after an ad engagement. Did they generate a map to drive to a business? Or did they call to qualify a purchase decision or make an appointment?

The latter is simple yet powerful as smartphone penetration continues to escalate. Not only is there high commercial intent in mobile search but the device itself – where 25 percent of search happens – is coupled with native dialing capabilities (fancy way of saying "phone").

Calls Calls Calls

BIA/Kelsey expects a sizable boost in call volumes to local businesses as a result of these trends. Mobile search in particular will eclipse other sources and drive 65 billion calls to businesses by 2016, a volume that will grow at a 42 percent compound annual growth rate.

Figure 5 - Calls to Businesses: Where Will They Come From?



BIA/Kelsey, 2013

[1] See BIA/Kelsey Report: Attribution: The Next Phase in the Age of Mobile Advertising, January 2014

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Mobile searches also have higher conversion rates in driving calls (57 percent) compared to desktop searches (7 percent). The reasons simply go back to the data in the previous section: Mobile users are more ready-to-buy, in the right location and with a device whose core function is to make phone calls.

Figure 6 - Mobile Driving Calls to Action

BIA/Kelsey's U.S. Local Media Forecast (2012 – 2017)

SMBs Like It Too

The smartphone's tendency to drive phone calls is well aligned with its appeal to businesses. Many businesses – especially small businesses without websites or search marketing campaigns – want the phone to ring. It's a tangible and manageable lead form.

This is supported by BIA/Kelsey data that peg incoming phone calls as the lead form SMBs value most. The firm's Local Commerce Monitor™ survey reports 66 percent of SMBs rate phone calls as a good or excellent source of leads – more than any category.

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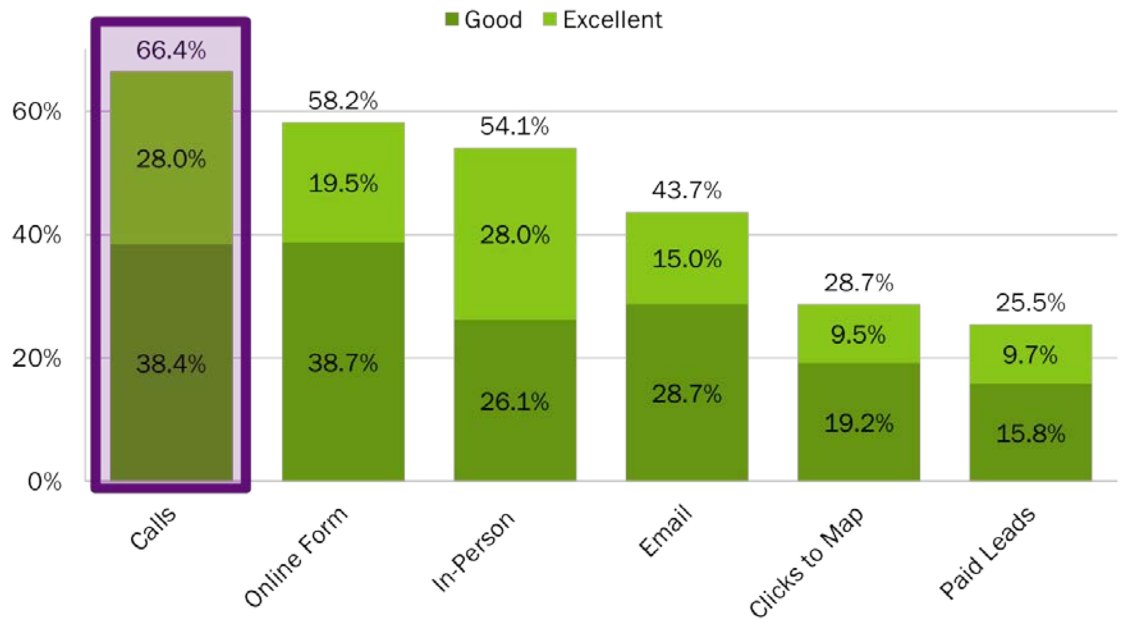
Figure 7 - Quality Assessment of Select Lead Sources



BIA/Kelsey Local Commerce Monitor™ (LCM) Wave 17, Q3/2013

Drilling down a bit further, it's clear that this value assessment is highest in categories that close new business over the phone, for example, appointment-based services. It's notable that the affinity for calls maps to high value business categories.

Specifically, calls are rated highest within local verticals such as financial services, home services, and professional services (lawyers, doctors). These categories place a high value on new customer acquisition, underscoring the business opportunity to drive phone leads.

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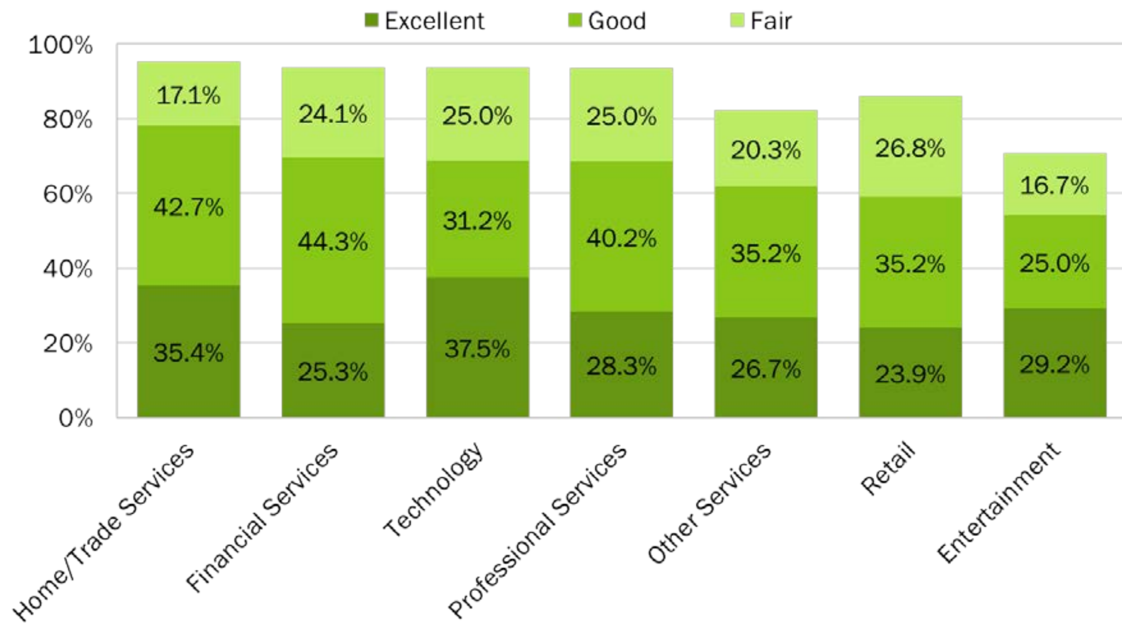
Figure 8 - Assessment of Calls by Vertical



BIA/Kelsey Local Commerce Monitor™ (LCM) Wave 17, Q3/2013

Businesses that have complex or variable products sets also tend to assign higher value to calls. These include high ad spending categories like insurance and auto repair, where human contact is often needed to answer questions.

This demand is evident in the marketplace, as reported by call analytics providers BIA/Kelsey talks to. Telmetrics for example says demand growth for mobile call tracking is showing signs of outpacing the rapid growth of mobile advertising demand overall.

"The number of marketers adopting calls as a cross-media ad performance metric is growing significantly," said Bill Dinan, president of Telmetrics, "because digital marketers recognize the value of using call analytics as key engagement and conversion indicators."

A $68 Billion Market

The alignment of user intent and advertiser interest – both explored above – create opportunities to channel mobile users towards businesses. For the same reasons, call monetization is an area where BIA/Kelsey sees sizeable opportunity and continued growth.

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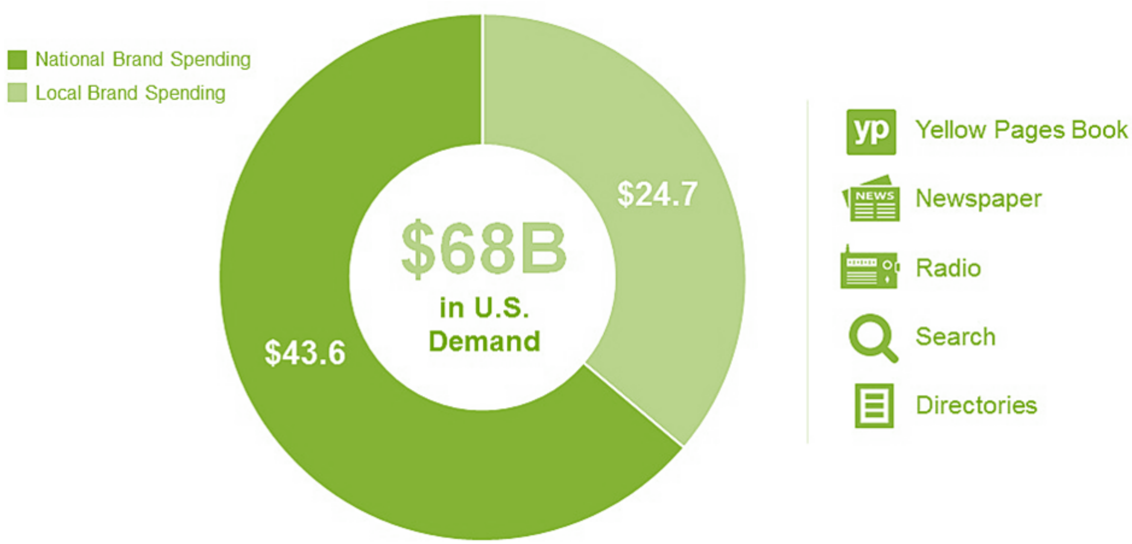
Specifically, the firm estimates that $68 billion is spent each year on advertising that is placed with the intention of driving phone leads. This includes ads in newspapers, radio, TV, Yellow Pages, and any advertising that's targeted to reach audiences in specific locales.

These local media will continue to drive the call-based ad market, but its growth will accelerate due to mobile usage growth. Due to all of the factors outlined above, call monetization's growth will follow the natural growth in consumer mobile usage.

It's also worth mentioning that SMBs only account for 36 percent of the $68 billion currently. Along with the "down market" trends in technology platforms explored in the next section, this market share supports lots of headroom for SMB call monetization growth.

How that will happen is the key question. And the answer lies in the developing forms of call monetization at many points along its value chain. This opens up the art of pay-per-call, tracking, routing, management and a growing suite of functions we'll explore next.

Figure 9 - Driving Phone Calls to Local Businesses: A $68 Billion Market



BIA/Kelsey, 2013

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Drilling Down on Call Monetization

It's clear from the projected increase in mobile calls, and from mobile users' high local intent, that SMBs will see increasing call volumes in the coming years. Because they highly value these calls, monetizing them more directly will be an opportunity for innovation.

That will include platforms to drive and track inbound calls. And given SMBs' need for simplicity, the name of the game for digital marketing products will be to help SMBs easily understand why they are getting more calls, and where they're coming from.

This builds from previous sections, in which we've detailed the massive market opportunity in driving calls to businesses, and introduced terms like "call monetization" and "call based ad market." But what exactly do we mean by call monetization?

"Click to call" (and its monetization structure "pay-per call") is the most common association with call monetization. Google's work in this area has driven the phrase into the mainstream consciousness, as tends to be the case with all things Google.

Several other companies are tackling various aspects of this opportunity. Local Corporation offers pay-per-call as part of its offering to local advertisers. And providers like Marchex, Telmetrics, Ifbyphone, Invoca and Callfire fulfill different parts of the call monetization ecosystem.

There are also important components that unlock further value in call monetization, such as call tracking and analytics. There's predictive modeling to determine caller intent and route calls accordingly – for instance to an automated system versus a live person.

Many of these technologies are developing today for big national brands or enterprises that field large volumes of incoming calls (think call centers). But as they develop and are simplified they will move down market to be applied to SMBs.

This will start with the M (medium) in SMB before moving to the S (small). Both groups value calls and collectively represent tens of billions in marketing spending. Next in the progression await very small businesses (VSBs) that likewise represent a large opportunity.

This down market shift will result from natural market evolution that typically drives technologies to the SMB segment. But it will also importantly result from the expected rise in calls to SMBs which will compel more sophisticated tools to manage higher volumes.

"Supporting digital marketing companies is and will remain a significant component of our business," says Steve Leonard, Executive Vice President and General Manager at

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Bandwidth. “Beyond companies serving large national brands, we see increased demand for local phone numbers as ad tracking tools for local businesses.”

Currently, many online marketing and presence products for local businesses (websites, social media, local listings, and email marketing) naturally drive phone calls. Call monetization in these cases happens in more of an indirect way through subscription service. Yelp is one example.

These subscription-based products potentially miss an opportunity to monetize valued inbound leads more substantially. This will evolve among many platforms to place more direct measurement and value on calls as part of a bundle of SMB marketing tools.

These are all important and growing areas we’ll detail in the sections below. It’s important also to see how they come together in a “whole is greater than the sum of its parts” manner. As these areas develop, they are fusing together in more holistic ways.

Pay-Per-Call

Google, 2014

Pay-per-call has existed for years in traditional media such as newspapers and Yellow Pages. Dedicated metered numbers track and attribute calls back to a given ad campaign, or even a given placement within a campaign. Advertisers can often be charged per call.

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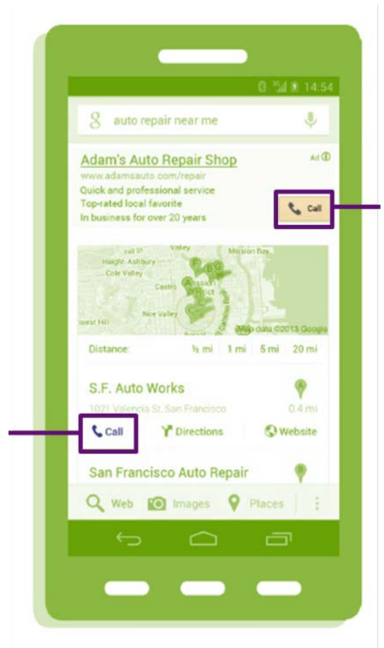
Today, call analytics can not only measure calls, but assess "call quality." This quality assessment is based on variables that include call duration, keyword spotting and other factors described in the following section on "call tracking."

Pay-per-call has evolved in step with digital media such as search. As noted earlier, search's high-intent use case aligns with the consumer need to make phone calls to qualify purchase decisions.

During search marketing's tenure on the desktop, conducting calls was cumbersome for users given that the PC and the phone are separate devices. Beyond the tech savvy minority using "softphones" like Skype, there was little direct connection between search results and calls.

The advent of the smartphone has fused the search device to the calling device for a more intuitive process. Hardware aside, the high intent nature of mobile searchers drives higher quality billable leads to businesses.



Google, 2014

This has all created an environment ripe for mobile pay per call. Phone numbers in search results and local apps like Yelp and YP mobile are hyperlinked to launch phone calls. Many of these apps have responded in turn by charging advertisers for calls driven from the app.

This can happen on a per-call basis, usually powered by companies like Marchex, Telmetrics and others that work with publishers and advertisers. It can also be an incentive to buy into a premium subscription-based ad package proposed to drive higher call volumes (what Yelp does).

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In either case the models developing to monetize calls show high value leads resulting from mobile search, app usage, and overall mobile engagement. Analytics providers such as Marchex can qualify ROI in more granular ways, as explored further below.

The Big G

Another key proponent of mobile pay-per-call is Google. The company has pushed the medium heavily within its AdWords paid search platform. This recently evolved with its new Enhanced Campaign platform that includes better tools for bidding on calls, among other things.

With Enhanced Campaigns, advertisers can set conditions and adjust bids based on where and when they want the phone to ring. For example, a need for calls during business hours or from within a service area can govern ad placements that comply with those variables.

For multi-location businesses, Google can automatically show the number for the closest location to a mobile searcher. That can better serve the user while also giving more authenticity to the ad (presence of a local phone number instead of a 1-800 number).

This has resulted in higher performing ads: Google reports 8 percent more clicks on ads that contain such local phone numbers. And just like clicks on ads, calls are monetized by Google depending on the demand-driven bids placed by advertisers for certain keywords.

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Figure 10 - Phone Numbers Boost Search Ad Performance

Google, 2014

Call Tracking

A vital component of pay-per-call and broader SMB marketing platforms is call tracking. This art has evolved over the past decade to better identify qualitative aspects of incoming phone leads, including things like call duration and a growing list of identifiers.

The need for call tracking is driven by two main factors:

1. Attribution: Identifying where quality calls happened so advertisers can be billed accordingly and be educated on ROI metrics for their call campaigns. This can support ongoing campaign effectiveness, optimization, and low churn.

2. Call Routing: Analyzing incoming calls to optimally route them. This can utilize data such as the call source or other attributes to predictively model where calls should be routed within an organization to optimize resources and effectiveness.

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Attribution

In the age of big data, there is more expectation from advertisers of all sizes to have a clearer sense of advertising ROI.

“SMBs increasingly need things to be multichannel, actionable and measurable,” said GoDaddy CEO Blake Irving during BIA/Kelsey’s December Leading in Local Conference. “So a business that made a connection with a customer has metrics and can say ‘I made these offers and this is the percentage that converted, here’s how conversion looked, and here’s what it did for my business.’”

Herein lies the tension between simple product design and more feature-rich (but complex) tools. The latter is compelled in call tracking by increasing levels of call volumes due to mobile trends outlined in earlier sections.

At the more “simple” end of the spectrum are products like Google’s AdWords which provide tools for SMBs to get an understanding of the basics of attribution. A top objective for any technology provider in this situation is to show that they are responsible for driving these calls.

Figure 11 - Google’s Call Analytics Dashboard

Campaigns | Ad groups | Settings | Ads | Keywords | Networks | Audiences | Ad extensions | Auto targets | Dimensions | Topics

View: Call details | Filter | Columns

Start time	End time	Status	Duration (seconds)	Caller area code
Jul 26, 2011 9:20:25 AM	Jul 26, 2011 9:20:25 AM	Missed	0	352
Jul 20, 2011 2:08:44 PM	Jul 20, 2011 2:08:48 PM	Received	4	718
Jul 20, 2011 5:07:48 PM	Jul 20, 2011 5:07:48 PM	Missed	0	--
Jul 20, 2011 5:20:09 PM	Jul 20, 2011 5:20:09 PM	Missed	0	512
Jul 20, 2011 4:25:35 PM	Jul 20, 2011 4:25:35 PM	Missed	0	719
Jul 26, 2011 4:02:57 PM	Jul 26, 2011 4:02:57 PM	Missed	0	918
Jul 26, 2011 4:06:05 PM	Jul 26, 2011 4:06:05 PM	Missed	0	918
Jul 25, 2011 11:02:53 AM	Jul 25, 2011 11:15:02 AM	Received	729	561
Jul 20, 2011 2:18:08 PM	Jul 20, 2011 2:18:08 PM	Missed	0	574

Google, 2014

From there the sophistication can grow through features like call recording to help SMBs understand call quality. As explored below, call quality assessment is vital. Call recording for SMBs is at the lower end of the spectrum, but passes the “keep it simple” requirement.

As SMB call volumes increase, it will compel features to manage and analyze call quality in more automatic or algorithmic ways. It’s important to look to more advanced and enterprise-geared products as an indication of what will eventually be available for SMBs.

Such products are developed for national brands that field high call volumes and need detailed measurement. Marchex is a good example of a provider which has advanced

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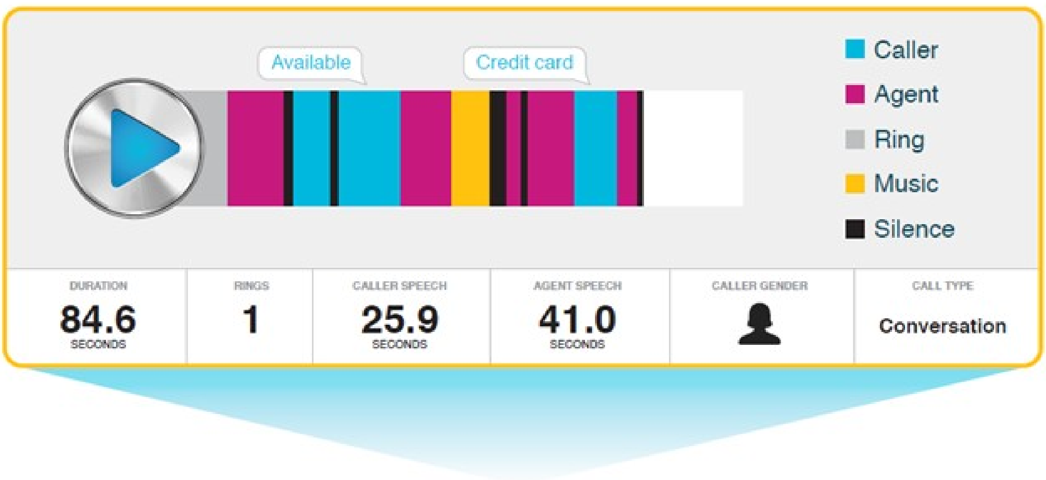
well beyond basic call analytics explored above such as frequency, duration and source.

More granular variables of call quality include things such as spotting keywords that are indicative of high value conversions (think "transmission" in auto repair calls). A credit card number being given over the phone can be another conversion signpost.

Marchex's CallDNA platform analyzes calls in real time and in turn reports the value of these calls in an intuitive color coded way. It can pick up variables such as the caller's voice versus the business's voice, and other important factors that can begin to qualify calls.

Figure 12 - Marchex Real Time Call Analytics



Marchex, 2014

A caller's gender can help determine if ads are reaching target demographics. Other attributes such as duration, hold time, voice inflection and a litany of factors can map to prototypes that have been established for quality calls within specific business categories.

Once a given business defines these quality metrics with the help of a provider like Marchex, its call tracking platform can sniff for those desired criteria. Businesses can then be billed only for calls that meet those standards. The rest are weeded out.

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Call Routing: Helping SMBs Manage

Much of the same technology that goes into tracking calls and determining quality can also be used to route those calls optimally. In other words, the ability to pre-determine call quality in some cases can save valuable time due to where it's routed.

SMB needs today don't usually involve advanced call routing. As call volumes increase, however, helping them better manage those calls will be a sizeable opportunity. SMB phone systems, marketing and CRM will also continue to merge.

Following a theme in the sections above, with call routing it's likewise valuable to examine what national brands are using today. Many of these tools will become more accessible, simplified and – due to increasing inbound call volumes – needed at the SMB level.

Enterprise call routing can include integrated voice response systems (IVR) that pre-qualify caller intent. It can also be more sophisticated predictive modeling that ingests data such as where calls come from, or if they've called before (existing customer, "bad" customer, etc.).

This is important because accurately routing calls can support customer satisfaction by avoiding needless bouncing around to various individuals or departments. Customer service is a vastly underrated form of marketing and reputation management.

Emerging forms of call tracking and call routing include things like location targeting. In some cases, this is the same technology that powers location based ad targeting. Knowing a caller's location joins the many attributes by which to assign value and route calls.

Marchex SVP John Busby gives the example of a rental car agency. A customer can be better served if the agency knows she's at the airport. And is she in the terminal, or in the lot waiting for a shuttle? Hopefully a "Planes Trains & Automobiles" scene can be avoided.

Though this is isn't an SMB example, it is analogous to what can be accomplished for an SMB. Indeed, many of the emerging technologies that BIA/Kelsey track start at the national advertiser level before moving down market.

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Figure 13 - Smart Call Routing Avoids Customer Service Nightmares

Paramount Pictures, 1987

Time is Money

Call routing also has benefits for businesses in directly revenue generating ways. Incoming warm leads for example can be routed to the best person to close a sale. Routing can also alleviate one of the biggest pain points for businesses of all sizes: opportunity cost.

For all businesses and SMBs especially, time is money. They are often time-starved, with their proprietors wearing many hats. Spending time on sub-optimal tasks like giving directions can negatively impact productivity or time otherwise spent generating revenue.

Another way to look at this is to compare it with other forms of marketing. Though calls offer advantages to SMBs over clicks, the opportunity cost of fielding low-quality calls is much larger.

Put another way, there's little incremental cost to accepting more clicks, beyond the imperceptibly small increase in machine capacity and bandwidth. Bad telephone calls, by comparison are a tax on a small business' finite resources.

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"Bad" calls can include solicitations, job seekers, mundane questions like directions and hours, service requests and misdials. Bad calls waste time, and fortunes are made by those who find new ways to save people time – SMBs included.

For these reasons and more we'll see an industry develop around call analytics to find, route and promote high-quality calls and their sources on one end of the spectrum. At the other end will be the ability to demote and exclude non-productive calls.

Conclusion: Bringing It All Together

We're seeing the tech and media worlds finally embrace the notion that phone calls are what many SMBs want. That's especially true in high value categories like professional services. Clicks and impressions, despite a sexier image, aren't as highly valued let alone fully understood by local business owners.

This notion of calls as currency has accelerated in the age of smartphones, which combined the search device with the phone. Calling a business post-engagement is intuitive for users, in addition to being valuable for businesses. That's compounded by smartphone users' high commercial intent.

These are key reasons behind BIA/Kelsey's estimate that $68 billion is spent annually across media on localized ads to generate calls to businesses. BIA/Kelsey data also indicate that 66 percent of SMBs consider phone calls the most valuable form of incoming leads.

There's also a trend towards converging functionality for operational and marketing platforms for enterprises a la Salesforce. The next step is down-market migration to SMBs. The idea is that it's not just about pay-per-call, but call analytics and routing.

So how does this all come together? It's important to acknowledge another important element of call monetization: call management. This usually plays out as hosted cloud based platforms that manage pay-per-call, routing and other functions.

"Tracking the call is not enough," says Ifbyphone CEO Irv Shapiro. "You need tools to route that call to the optimal party to close a sale; and a third set of tools manage the call once it's routed. The last leg is outbound customer notification. If you're running a business engaging customers by phone, we think you need all four."

These types of packages aren't yet as relevant to the SMB sector as they are to large businesses with high call volumes and call centers to manage, as addressed by providers such as Invoca and others mentioned throughout this report.

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Like many things that are subject to eventual SMB adoption, this technology began at the enterprise level. But it should be recognized by anyone addressing the SMB segment for its potential migration down market.

This down market shift will come about as growing inbound call volumes to local businesses compel more sophisticated solutions. But as these platforms address the massive local marketing opportunity, they'll have to meet another vital criteria for any SMB-focused product: Simplicity.

"We see from customers and our own research that SMBs are an underserved market segment for call tracking," said Bandwidth's Steve Leonard. "This is due to the over-engineered nature of the solution SMBs are expected to consume."

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About BIA/Kelsey

BIA/Kelsey is a market research and analyst firm that focuses on all things local. Local media is an increasingly dynamic area of ad spending, and is quickly evolving with emerging digital platforms like mobile, social and search. Over the past three decades, BIA/Kelsey has been an authoritative voice on these developing technologies as well as their forbearers in traditional media, which continue to transform as they likewise compete for local ad dollars and consumer affinity.

Through a growing suite of products and media like research reports, articles, conferences, and client consulting, BIA/Kelsey analyzes the business, financial, social and technology trends affecting local media. Readers, event attendees, partners and clients are given the inside track on critical data, analysis, and recommendations needed to grow and transform in a rapidly evolving media and advertising landscape.

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About Bandwidth

Bandwidth is the phone company driving today's leading call analytics providers including Google, Marchex, Telmetrics, Callfire, and Ifbyphone. Bandwidth's nationwide footprint covers more than 7,100 rate centers with approximately 30 million active phone numbers on its network, making it the sixth largest voice provider in the country.

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