



Call Commerce

The What, Why and How

Video Insight Briefing Series



Q1 2016

Michael Boland
Chief Analyst & VP, Content
BIA/Kelsey



Introduction

BIA/Kelsey *Video Insight Briefing*: What is It?

- To complement BIA/Kelsey written reports, we are rolling out a new intelligence resource: **Video Insight Briefings**.
- These are a series of briefings that BIA/Kelsey analysts will complete on “tentpole” topics that are receiving the most investment, innovation, and curiosity. We will also cover topics as client demand dictates.
- ***What can you expect in a Video Insight Briefing?*** Presented in slide format, briefings include a video discussion of the presentation along with key links to multimedia assets about the topic. Our goal is to use a briefing on a particular subject to deliver insights and analysis via video. This format also aggregates our content by topic so it's easy for you to find and access. We will be available to discuss the briefing after you've consumed it. We are also available for customized briefings.

This Video Insight Briefing zeroes in on **Call Commerce**. What is it? Why should you pay attention? How big is it? Who are its main players? And what are best practices from the field? The following slides unpack the key drivers, variables and analyst insight.



Call Commerce

What is it?

BIA/Kelsey defines call commerce as the area of local media that involves driving, tracking and analyzing incoming phone leads. It has taken new forms in the mobile era, due to exploding call volumes and analytics for businesses of all sizes and verticals.



Agenda

1. Video presentation: slides w/voiceover
2. Additional drill-down resources including insight paper, conference videos & recommended reading
3. Presentation slides: *Call Commerce in the Smartphone Era*

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Video Presentation (Video Delivery of Slides 14-32)

CLICK TO WATCH

(Clicking opens a private web page on our YouTube channel.)



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Conference Interview: Marchex

Data, case studies and best practices in driving high-value phone leads

CLICK TO WATCH

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Panel: Defining the Call Commerce Opportunity

Keynote panel at Contact.IO, featuring BIA/Kelsey Chief Analyst Mike Boland

CLICK TO WATCH

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Webinar: It's a Click-to-Call World

Strategies to drive and track phone calls in high-value local verticals

CLICK TO WATCH

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Mike Boland Webcast: Click-to-Call at point of intersect.

Excellence Motors

2015 QX60



Further Reading: BIA/Kelsey Articles

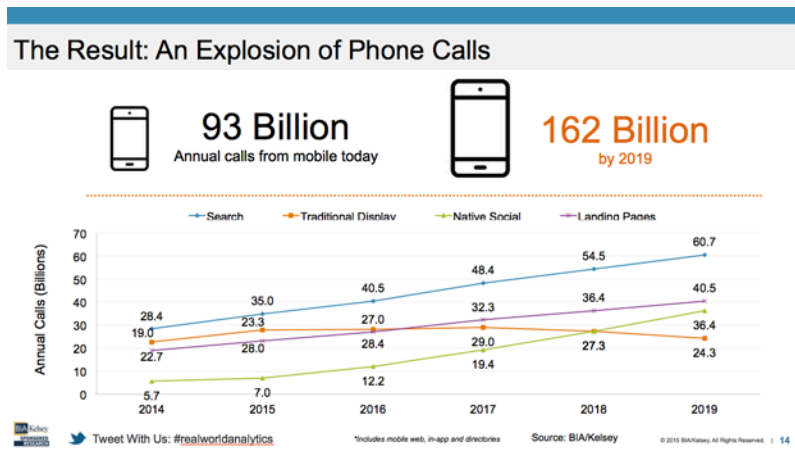
Deeper analysis and analyst coverage of the topics covered in this presentation

Highlights

- 'Big Voice' is the Next Big Market
- Measuring Beyond the 'Last Click'
- Call Commerce Influences \$1T in Spending
- \$162B Mobile Calls to Businesses by 2019
- The Ultimate Native App is Voice

Full Library

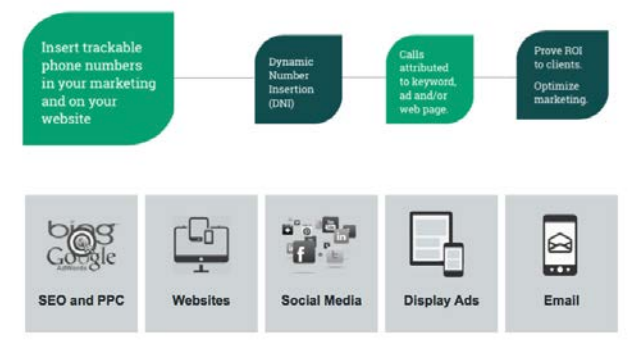
BIA/Kelsey Call Commerce Articles



The Missing 98%
Why display advertising isn't receiving the credit it deserves for inbound phone calls

November 2016 | MARCH

Closed-Loop Attribution for Mobile Marketing





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EDITOR'S NOTE:
REFER TO SLIDE 5 FOR THE AUDIO/VIDEO
DELIVERY OF THE FOLLOWING 18 SLIDES



Call Commerce

The What and the Why



March 2016

Mike Boland

Chief Analyst & VP, Content

BIA/Kelsey



Brief Intro

About Me

- 10-year industry analyst
- Former tech journalist (Forbes, Business 2.0)
- Focus areas: Mobile, Social, On-demand
- Frequent contributor to Huffington Post, Business Insider, the Guardian, Street Fight

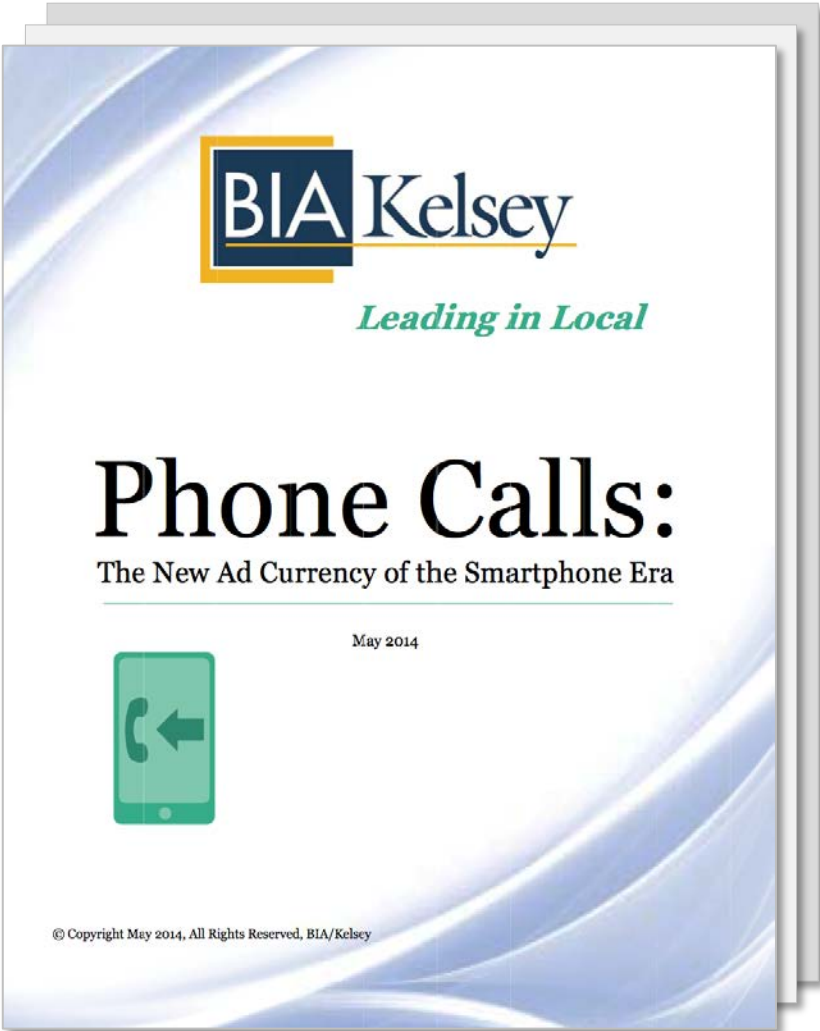


About BIA/Kelsey

- 30-year market research and analyst firm
- Squarely focused on local media & technology
- Conferences, Consulting, Content
- Authoritative daily newsletter, blog, video production, podcasts



Call Commerce: The New Ad Currency of the Smartphone Era

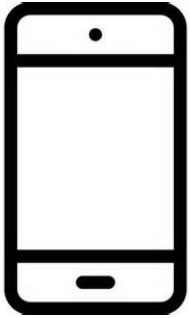


Let's Start with Usage:

Where are we now?



Mobile Usage: The Starting Point



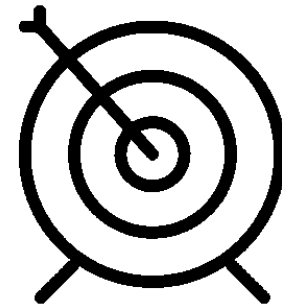
79%

U.S. Smartphone penetration
(BIA/Kelsey)



51%

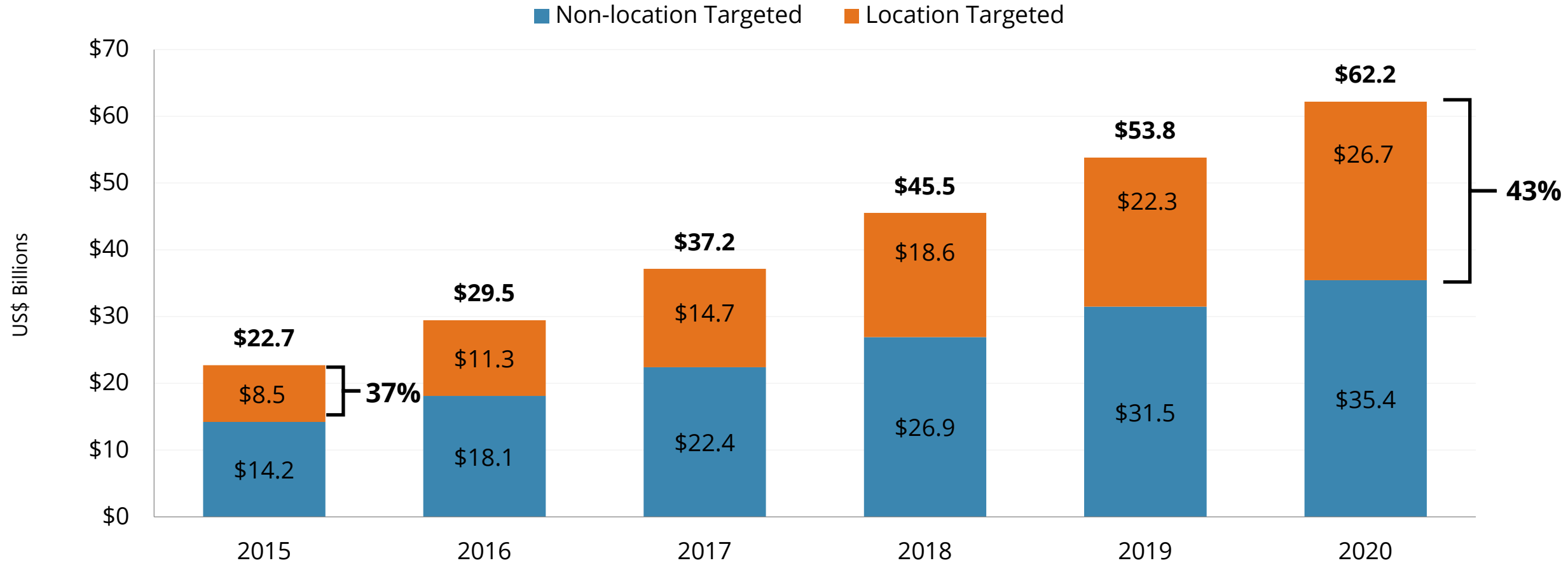
of search query volume is on
smartphones (Google)



50%

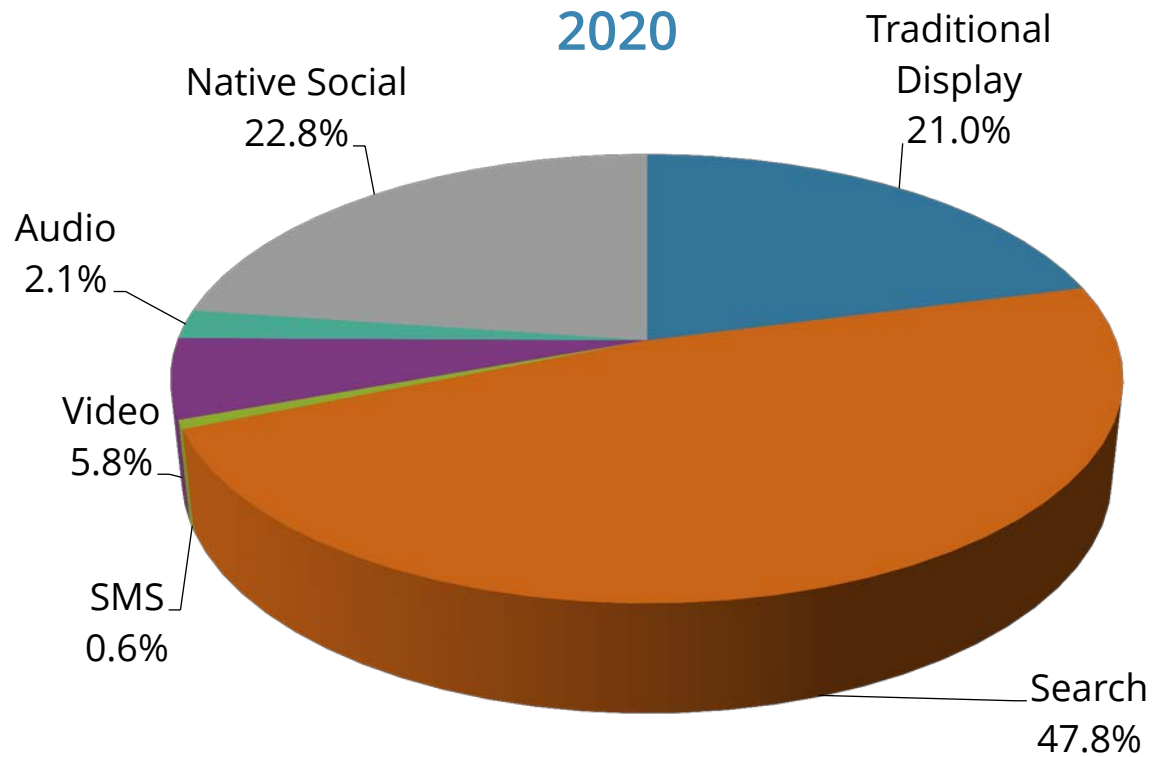
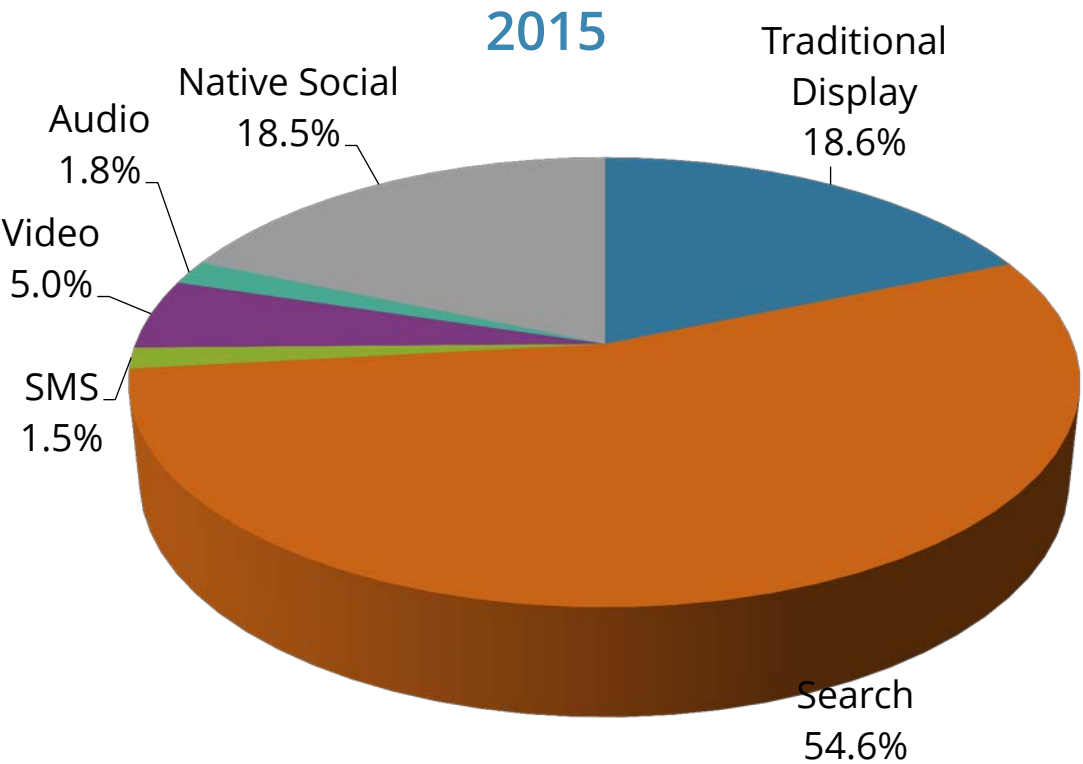
of mobile search queries have
local intent (BIA/Kelsey)

BIA/Kelsey Fresh Mobile Ad Revenue Forecast (U.S.)



Note: Numbers are rounded.

Mobile Ad Share by Format

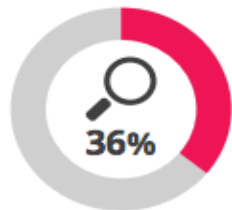


Why Does That Matter?

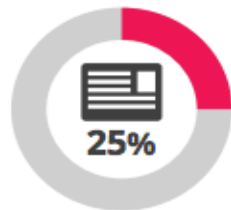


Mobile searches drive valuable outcomes for businesses

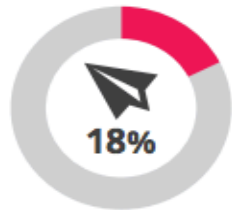
3 of 4 mobile searches trigger follow-up actions



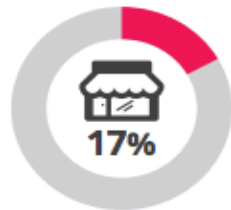
Continued Research



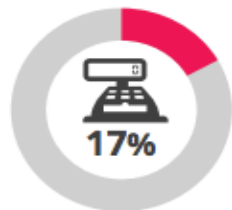
Visited a Retailer's Website



Shared Information



Visited a Store



Made a Purchase



Called a Business



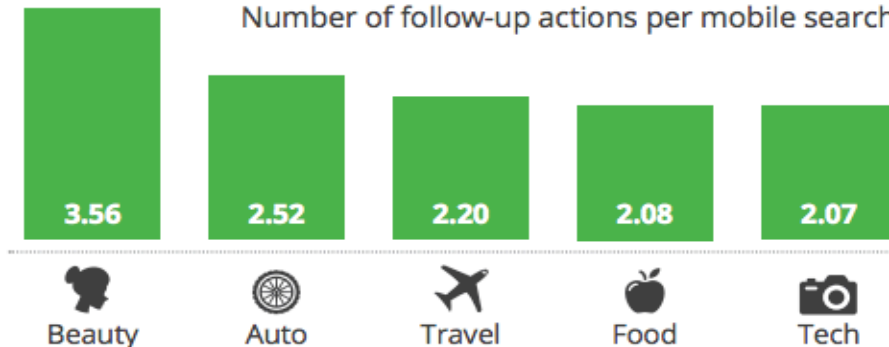
Actions triggered by mobile search also happen very quickly

55% of conversions (store visit, phone call or purchase) happening within an hour

On average, each mobile search triggers nearly 2 follow-up actions

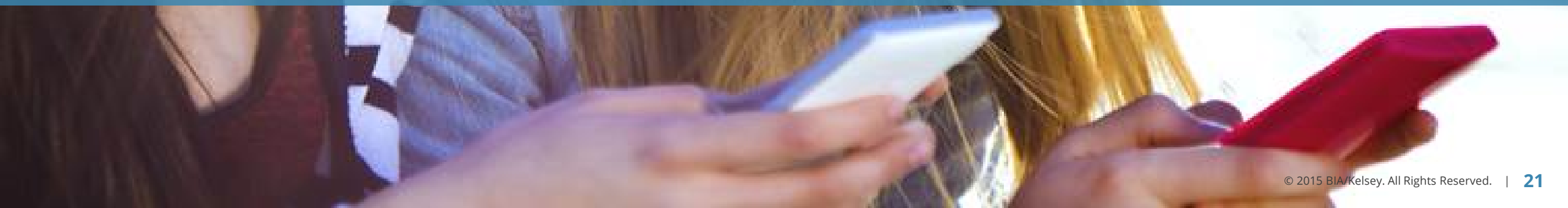
Product & shopping searches have a higher number of outcomes

Number of follow-up actions per mobile search





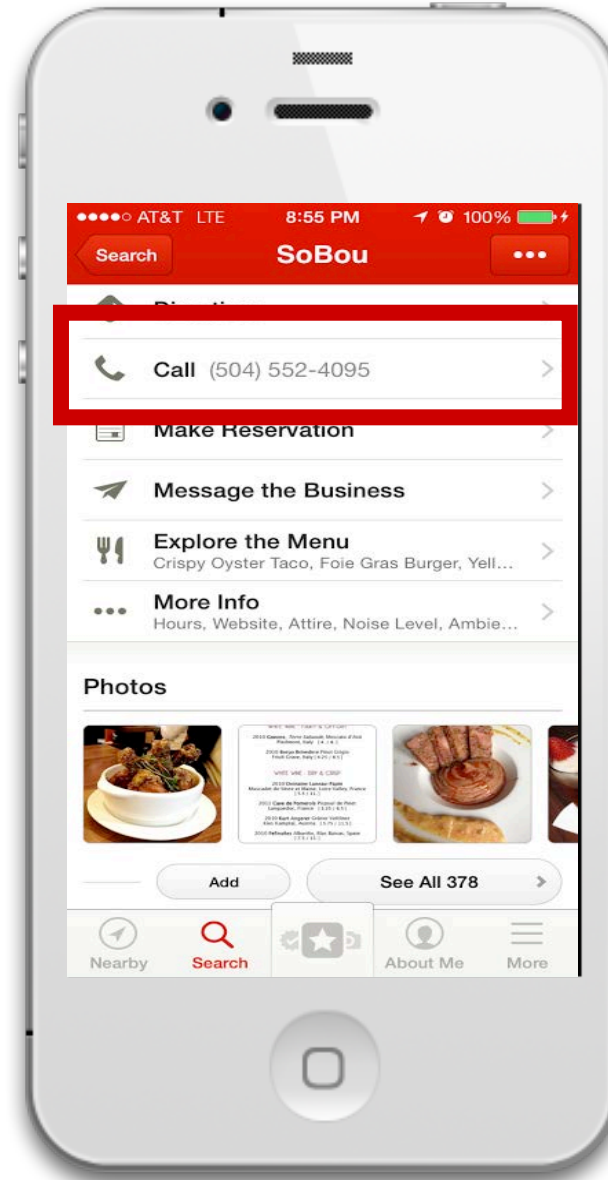
The Lesson:
The intent is there... it just needs to be captured.
(...But how?)



It's All About Calls to Action



- Reservations/scheduling
- Ordering
- Messaging
- Click-to-call
- Real-time Inventory
- Photos
- Videos





Drilling Down on Click-to-Call

Smartphones drive voice and call activity

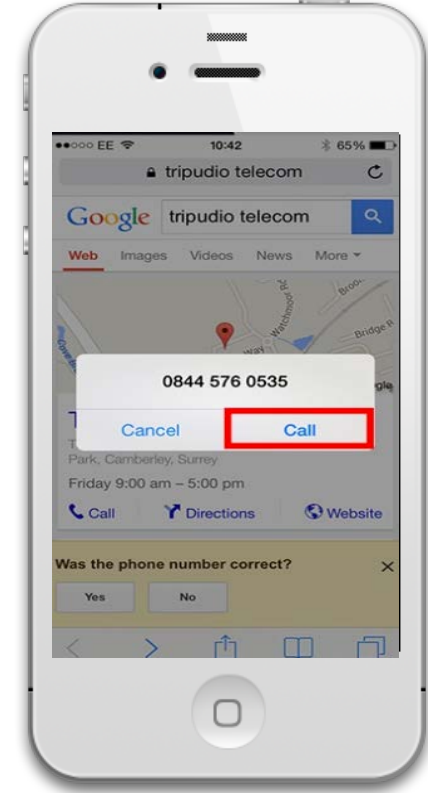
- Hardware realities (voice input, dialer)
 - High transaction intent
 - Products that have complexity
 - Autos
 - Healthcare/medical
 - Financial services



Google Adwords



Google Organic



Click-to-Call Example

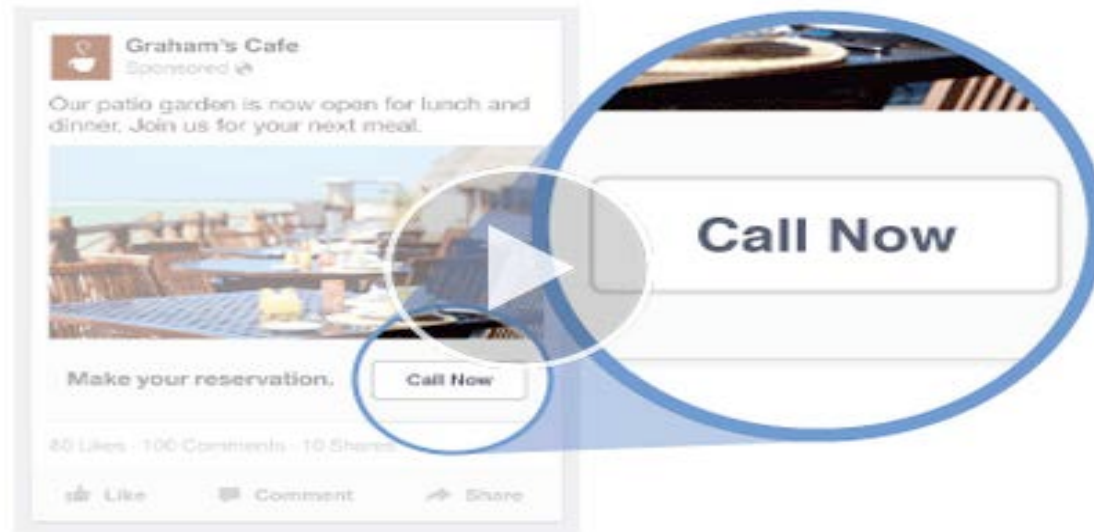
Not Just Search... All the Places a Phone Number Can Show Up

The image illustrates how a phone number can appear in multiple mobile contexts:

- Website Header:** Miller's Bakery website showing the phone number 1-800-123-4567.
- Map Listing:** Best Buy Mobile Phone Center listing for San Francisco with phone number (415) 626-9682.
- Social Media:** A tweet from Renault France with a call-to-action to call +80087362858.
- Restaurant App:** SoBou app interface showing a call button with the number (504) 552-4095.

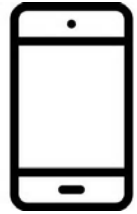
Blue lines and circles connect these phone numbers to the SoBou app interface on the right, demonstrating how a single number can be associated with different locations and services.

... Including Social Apps: The Next Frontier



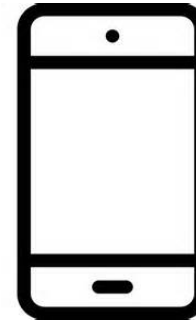
- In the last 6 months alone, Google, Facebook, Pinterest and Instagram have launched "buy" buttons for ecommerce.
- This is part of a push towards more action-oriented social content and app *deep-linking*.
- **Offline commerce is next**, in many cases facilitated through voice and *call buttons* (Facebook is already there).

The Result: An Explosion of Phone Calls



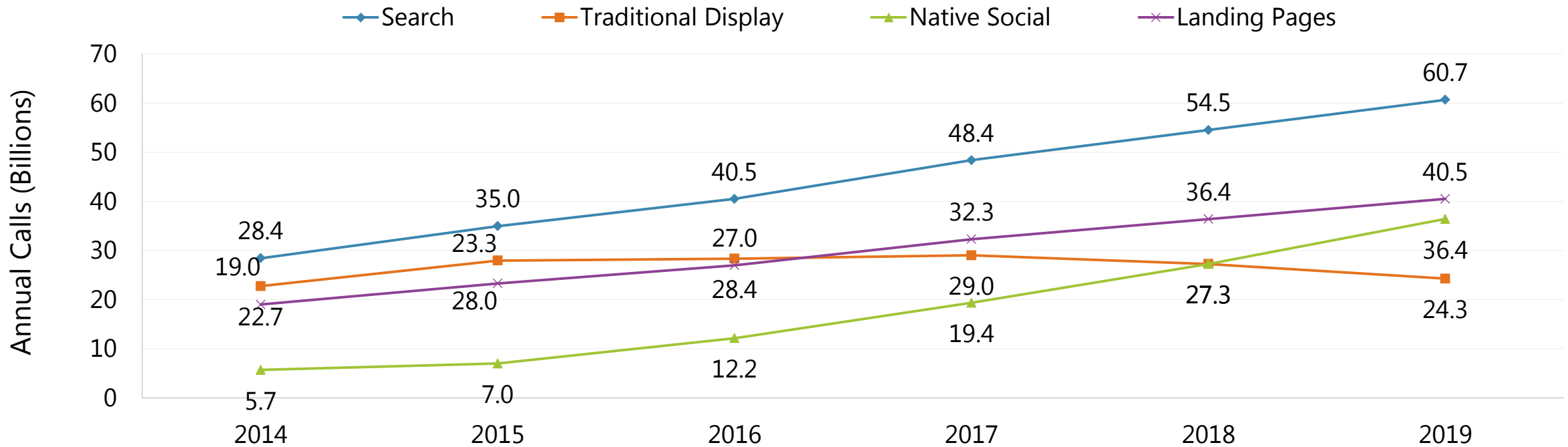
93 Billion

Annual calls from mobile today



162 Billion

by 2019



*Includes mobile web, in-app and directories

A young man with short brown hair, wearing a dark suit, white shirt, and blue striped tie, is smiling and talking on a black mobile phone. He is looking slightly to the right. The background is a blurred outdoor setting with a large white building, possibly a government or institutional building, under a bright sky.

These calls are happening either way....

It's a matter of channeling, tracking,
analyzing and optimizing them.

This all happens on two levels...

Marketing

- Driving call - based leads
- Optimizing inbound call routing
- Tracking ROI
- Iterating campaigns using call data

Service & Support

- Call Center Management
- Rep/CSR Training
- Call Routing
- Quality control (i.e. reducing hold times)

Why is this important?

Trend #1

Marketing is Becoming more Empowered and Independent

*“Marketing is now a fundamental driver of IT purchasing, and that trend shows no signs of stopping –or even slowing down –any time soon. In fact, Gartner analyst Laura McLellan recently predicted that **by 2017, CMOs will spend more on IT than their counterpart CIOs.**”*

--Forbes

Why is this important?

Trend # 2

Cloud/SaaS Products are Enabling this Shift.

“SaaS products delivered in the cloud will empower marketers to have more purchasing power and not go through the red tape of the IT department. It also democratizes previously-unavailable capacity to small businesses, given a low barrier subscription service that can scale up and down as needed... as opposed to capital requirements for on site technologies, servers, etc.”

-- Mike Boland, BIA/Kelsey 2015

Given the *What* and *Why*...The Remaining Question:

“How?”



Questions & Comments:



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