

2015 Call Intelligence Index

Research into the role of phone calls in the omni-channel customer journey.



INTRODUCTION: DIGITAL MEETS PHONE CALLS

Nothing beats a voice-to-voice conversation. No other interaction is more personal or influential in a buyer's journey. In fact, executives rank phone calls as one of the top three most popular ways to engage customers, beating social media and even in-person interactions.¹ Paid search experts have also reported calls generate five to ten times more in revenue than a completed web form.²

Consumer-initiated phone calls are on the rise, and marketers are responding by making them a seamless part of the broader customer journey. To maximize ROI, they're harnessing deep call analytics to gain new insights into their customers and the omni-channel path to purchase.

From January to December 2014 Invoca analyzed 32 million inbound phone calls. The calls spanned more than 40 industries and were driven from the top online and offline marketing channels. From Invoca's call intelligence you'll discover how phone conversations and in-depth call analytics can be used to build better, more profitable customer relationships.

Table of Contents

- 03 Call Intelligence Highlights
- 05 Marketers Remember the Advantages of Phone Calls
- 07 Digital's Deep Relationship with Phone Calls
- 09 Key Caller Trends
- 14 Industry Breakout
- 18 Summary
- 19 Report Methodology

CALL INTELLIGENCE HIGHLIGHTS

Callers have high buyer-intent.

People who choose to engage over the phone are quality prospects who are much more likely to convert than a standard online lead. When you combine high buyer-intent with the personal assistance of a sales representative, the result is revenue-generating conversations.



Phone calls have 30-50% conversion rates, compared to only 1-2% for clicks.⁴

Today's consumer loves to call.

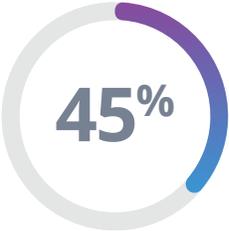
With more than two billion smartphones in use across the globe, people are living their lives digitally connected, and that means they're engaging more online and over the phone.



70% of people have called a business directly from a mobile search ad.³

Most calls come from mobile ads.

With the ease and convenience of click-to-call, mobile search is driving billions of phone calls.



45% of consumer-initiated phone calls to businesses are generated by mobile search.

Calls mean revenue.

Some products or services are best sold over the phone because they need the personal touch of a sales agent. Marketers in these types of industries are taking advantage of phone calls, using digital media to drive more calls and revenue.

For example, in 2014 calls increased **38%** across industries, according to Invoca's data. Not only are calls on the rise, but marketers using Invoca drove **\$2.2 billion** in revenue from phone calls.



Revenue from phone calls driven through Invoca.

MARKETERS REMEMBER THE ADVANTAGES OF PHONE CALLS

Mobile marketing is generating billions of consumer-initiated phone calls. In fact, Invoca found that **54%** of calls came from mobile marketing efforts and **45%** specifically from mobile search. Now that calls have been brought to the forefront of digital advertising, marketers are taking advantage. They are using their marketing campaigns and ad dollars to generate these valuable one-on-one conversations.

Mobile Bridges Online and Offline Conversations

On a mobile device, consumers can move from an ad to a live conversation with a single tap. And that journey has become the norm. As more people shop and research on their smartphones, more people are completing their purchases with a phone call. Marketers are standing in front of a huge opportunity to use mobile marketing to foster real-time, powerful connections with their prospects.

Phone calls beat digital interactions when consumers need ...

More Information



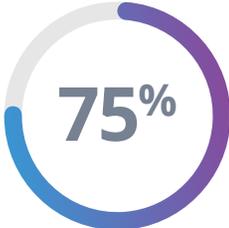
of consumers say mobile websites don't provide enough information.⁵

Convenience



of mobile searchers report that they always or frequently need to call a business from a mobile search ad.⁶

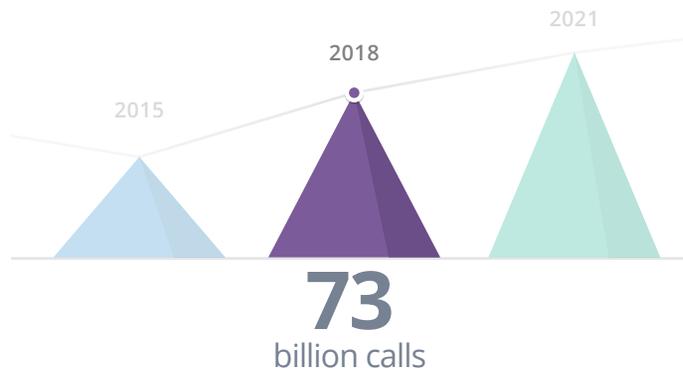
Quick Answers



of consumers say a phone call is the quickest way to get a response.⁷

Calls are Rising

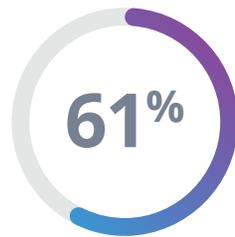
Under the force of mobile, customer behavior has evolved. Consumers expect quick and easy answers, and they won't settle for fat thumbs on small touchscreens. Consumers are making phone calls more than ever.



Mobile search will drive 73 billion calls to businesses by 2018.⁸



of people that connect with a business after a mobile search do so over the phone.⁹



of mobile searchers say click-to-call is most valuable in the purchase phase of shopping.¹⁰



Marketing Takeaway: Make It Easy For Consumers To Call

Consumers are spending increasing amounts of time on their smartphones and marketers are taking action. In fact, mobile ad spend increased **85%** in 2014 and accounted for over a quarter of global media ad spend according to eMarketer. But those dollars will be wasted unless you bring calls to your digital marketing dashboard.

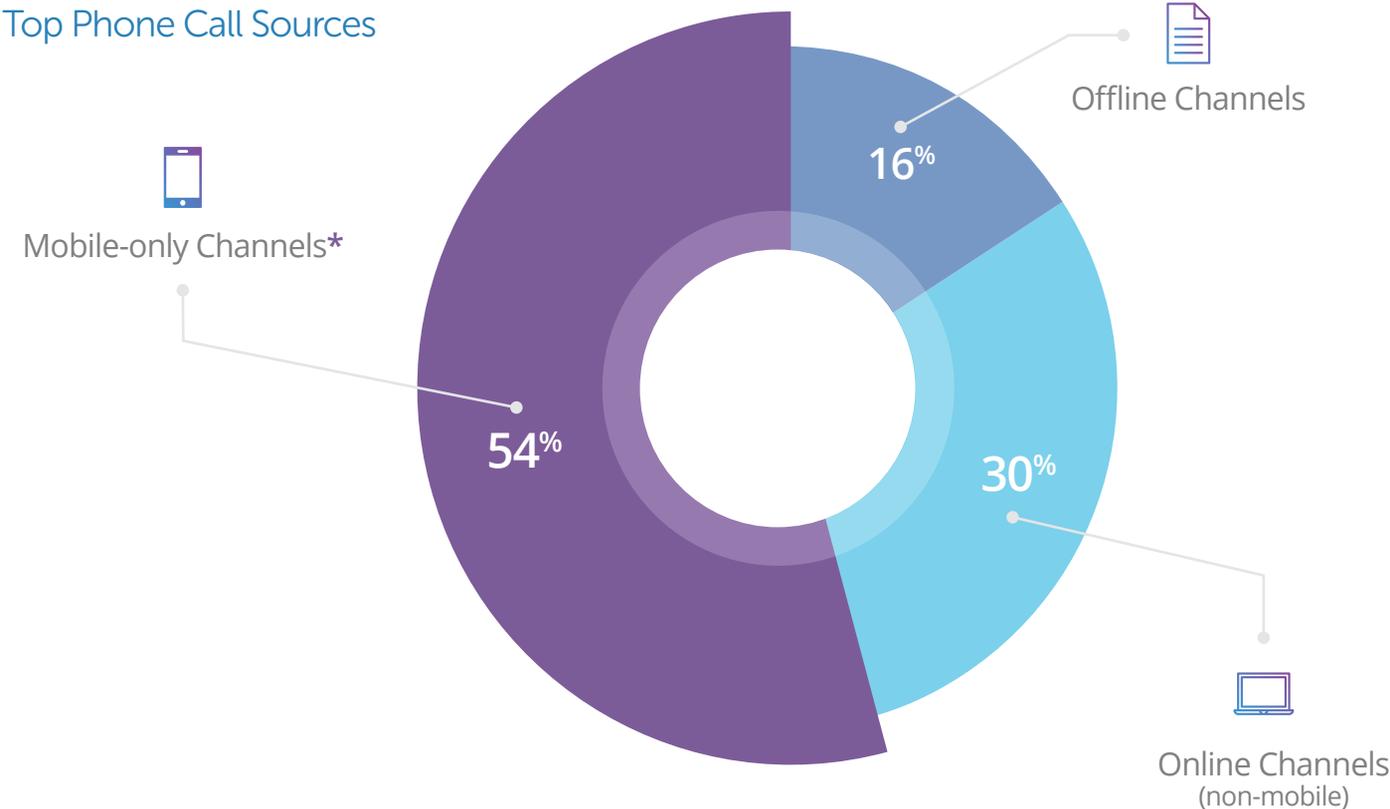
You've got to make it easy for consumers, especially those on a smartphone, to make a phone call. Failing to put phone numbers and click-to-call buttons in your ads, website, and landing pages will drive away potential customers. Make sure your phone number stands out and be sure to test its position, size and color for optimal results.

Making it easy for prospects to call is the first step. The second step is using call analytics to learn more about your customers and how they interact with and respond to your marketing efforts. Use these insights to make data-backed optimizations.

DIGITAL'S DEEP RELATIONSHIP WITH PHONE CALLS

Most Phone Calls Come from Digital Advertising

Marketers are responding to the new mobile consumer by designing digital campaigns with the specific goal of driving phone calls. While offline media remains a massive call-driver, digital marketing is responsible for billions of consumer-initiated calls every year. Consumers are bouncing between digital and real-world interactions more than ever, and companies are realizing that calls have got to be part of their marketing strategy. Here's how mobile-only, online and offline channels are contributing to total call volume.



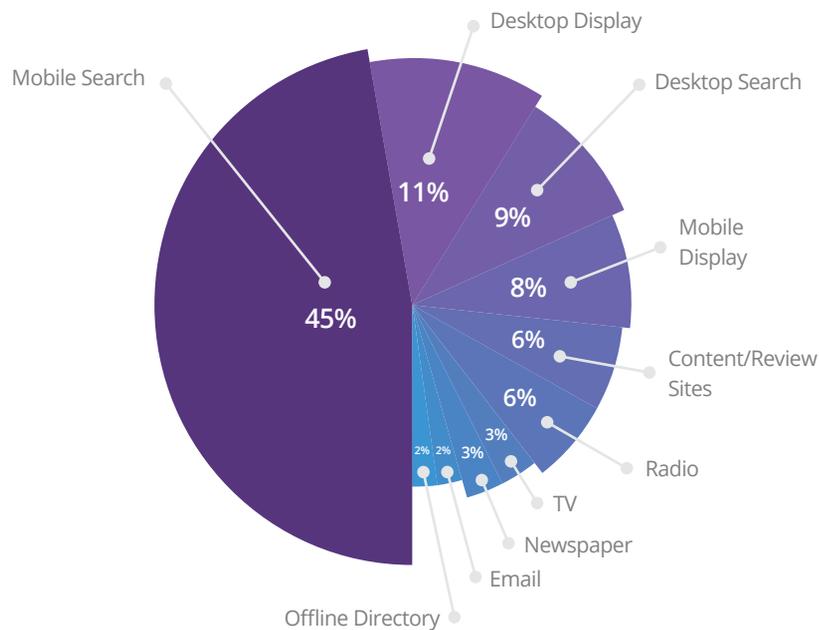
* Mobile includes mobile search, mobile display, mobile apps, and mobile websites.

Calls Are Flooding in from Mobile Search

More calls come from mobile search than any other channel. Consumers are opting to call from mobile search because it is convenient and aligns with their need for immediate and personal service.

New consumer behavior is not the only reason mobile search makes the top of the list. Platforms like Google AdWords and Bing have built click-to-call functionality within their ad platforms, making it easy for marketers to take advantage of this new ad format.

Top 10 Marketing Channels Driving Calls



Marketing Takeaway: Optimize Mobile Search Campaigns To Drive Phone Calls

With mobile search alone driving billions of phone calls, you need to design your mobile search campaigns with calls in mind.

Here are five tips to drive more calls from mobile search:

1. Use call extensions in your ads.
2. Include click-to-call buttons on your landing pages.
3. Increase bids on keywords that are driving quality calls.
4. Use targeting options to focus on prospects likely to make a call.
5. Analyze call analytics to spot areas to optimize your paid search spend and keyword bidding, landing pages, ad copy, and the caller experience.

KEY CALLER TRENDS

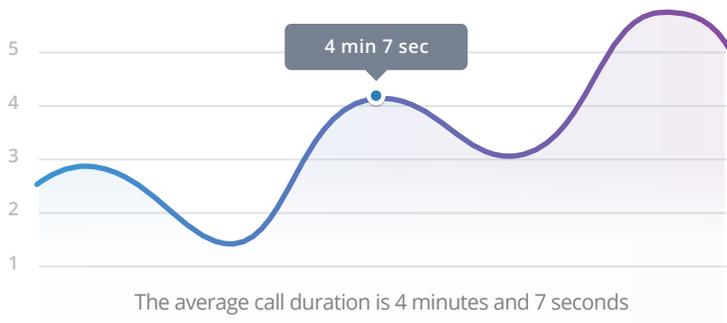
Call Durations Indicate High Buyer-Intent

In addition to driving more phone calls, marketers are focused on maximizing quality calls. While call duration is a key indicator of quality, it's important to understand how call durations vary by industry and marketing channel.

Desktop display, desktop search, and content/review sites refer calls that average over four minutes long, which reflect both the quality of traffic and the nature of these channels. Desktop search and content/review sites refer callers who have shown high-buyer intent and who are deliberately conducting research and looking for answers.

While desktop display may not consistently deliver high-quality click traffic, it does drive quality calls that average more than five minutes in duration. Callers referred by desktop display

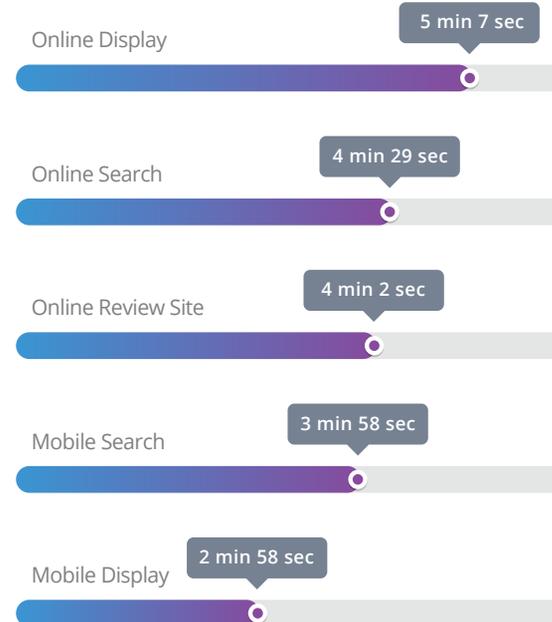
Average Call Duration



had to click an ad, visit a landing page, and dial their phone. The multi-step process indicates a quality lead.

Phone calls from mobile search are slightly below the average duration at 3 minutes and 58 seconds because many of these callers are looking for local information and need quick assistance, such as making an appointment or reservation.

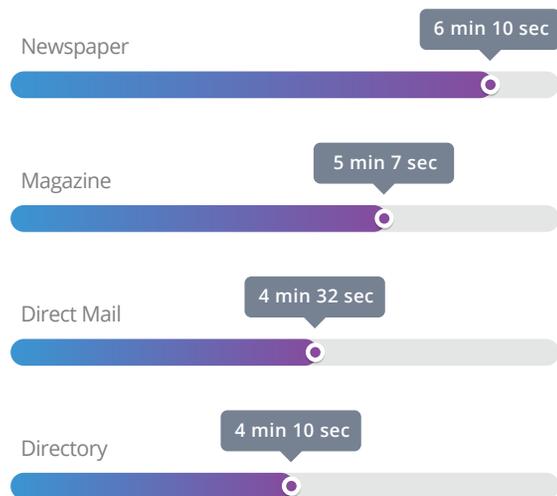
Average Call Durations by Online Call Sources



Offline Media Still Drives Great Quality Calls

Offline channels have relatively long call durations that coincide with the consumer's level of interest. Consumers calling from a print ad had to write down the phone number, grab their phone, and make the call. The level of effort reflects high buyer-intent.

Average Call Duration by Top Five Offline Call Sources



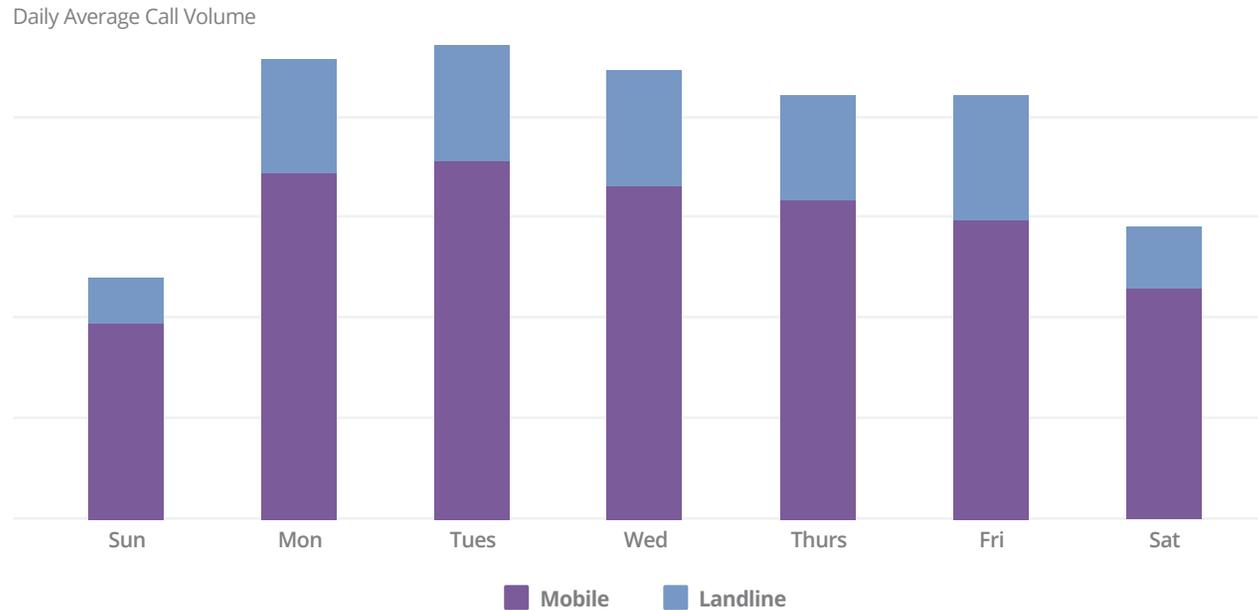
Marketing Takeaway: Measure Call Quality

Call duration is a key indicator of quality, though the optimal call duration varies across industries and organizations and even marketing channels. To gauge true call quality look beyond call duration. If you're serious about measuring marketing ROI, make sure to attribute revenue to phone calls and the marketing campaign that drove them.

You can also use call intelligence tools to capture the actual outcome of each call so you know when calls result in a sale or other type of conversion action.

When are People Calling?

Tuesdays receive the highest volume of calls, with **48%** more calls than Sundays, which receive the least amount of calls.



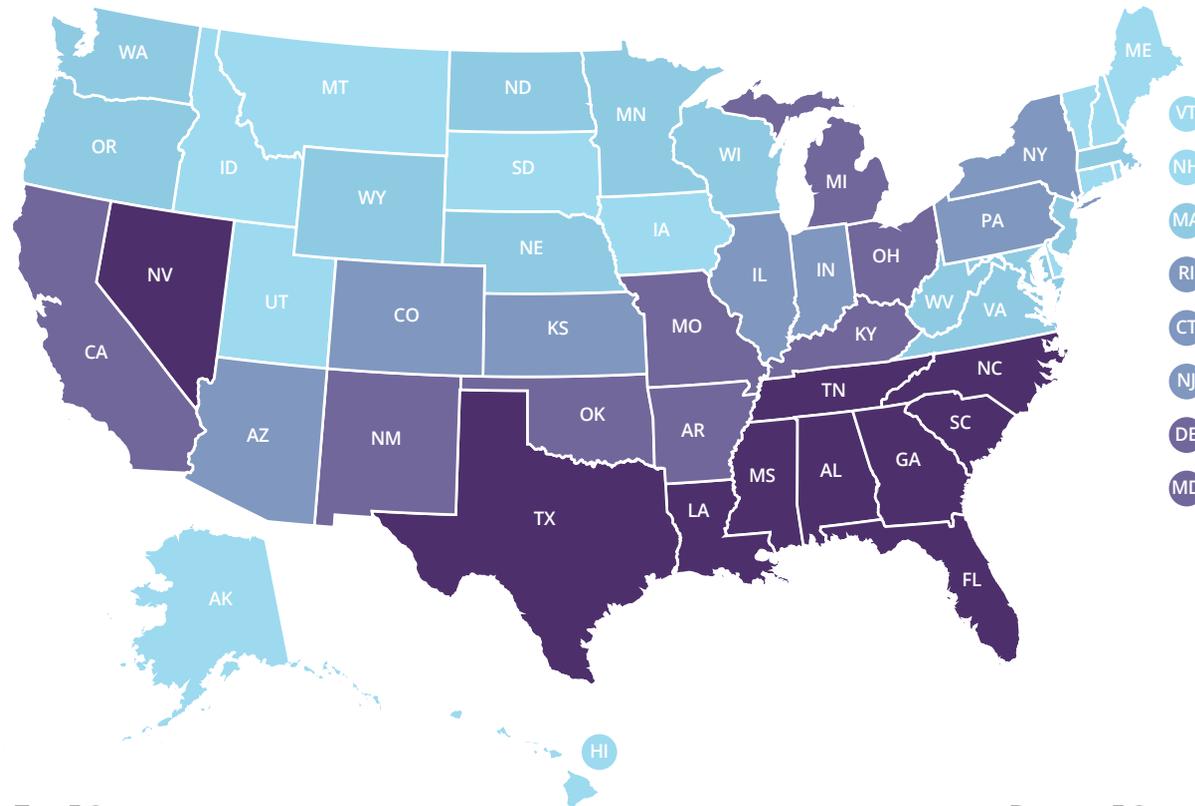
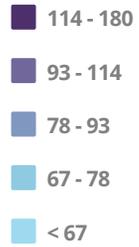
Marketing Takeaway: Capitalize On Peak Call Times

Monitor the days and times your business gets the most calls so you can target customers with call-based ads during these times. For example, serve your mobile ads with click-to-call buttons during days and times with peak mobile call volume.

You can also make sure call center or sales agent resources are allocated based on the days and times with the highest call volume.

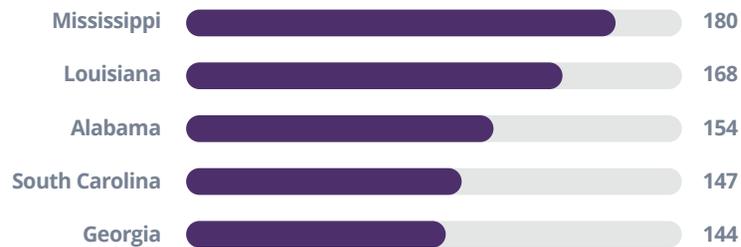
States Driving Highest Call Volume Per Capita

Calls Per 1000 People



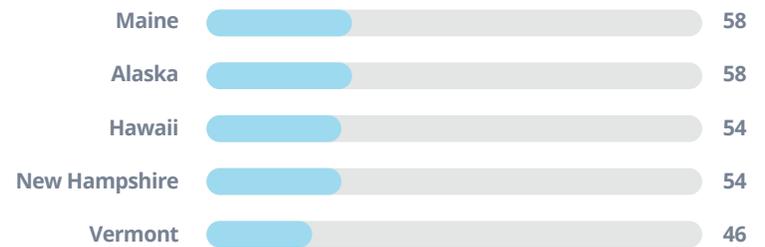
Top 5 States

(Calls per 1,000 people)



Bottom 5 States

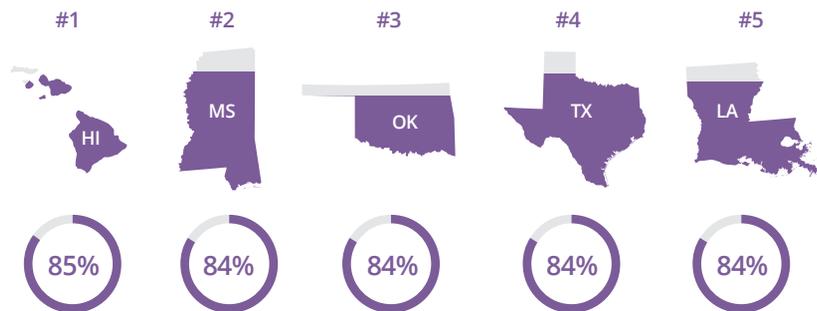
(Calls per 1,000 people)



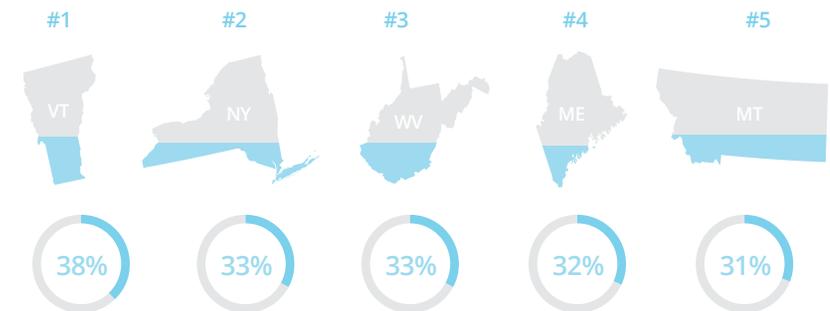
Mobile Versus Landline

Smartphone usage has skyrocketed. As of 2015, **80%** of adults own a smartphone, according to research by GlobalWebIndex. While smartphones have permeated nearly every aspect of modern life, there is still a place for landlines. In fact, **25%** of calls still come from landlines. Below you can see how each state uses mobile versus landline phones.

States with Highest Mobile to Landline Ratio



States with Highest Landline to Mobile Ratio



Marketing Takeaway: Use Call Analytics To Make Powerful Optimizations

When marketers know where customers are calling from and what device they're calling on, they can make smart targeting decisions.

For example, if most of your calls come from landlines, you know better than to target people on mobile search. Instead you can turn to desktop search, and other non-mobile specific channels, and even offline channels to drive calls. Likewise, you can target key regions for call volume that coincide with your business.

INDUSTRY BREAKOUT

Calls are Happening Across Industries

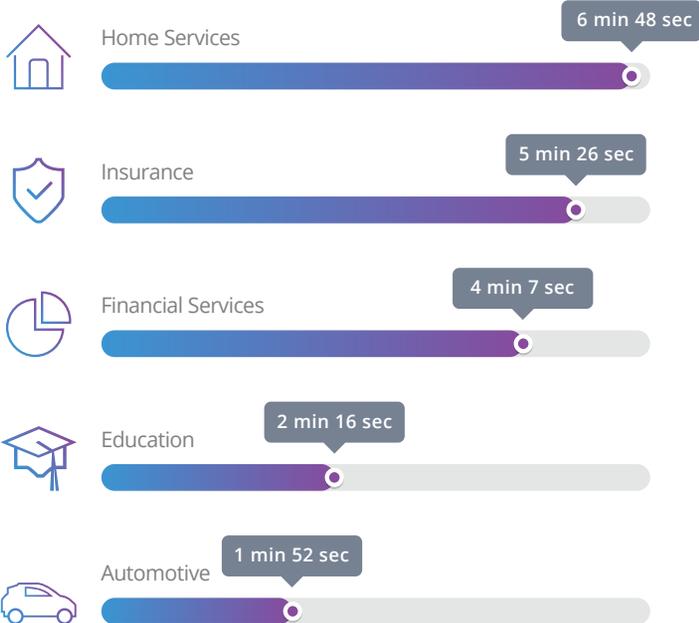
Phone calls are a key point of contact for most industries. Over two-thirds of calls placed in 2014 were spread across more than 40 different industries.

Nearly one-third of calls were concentrated in industries with a focus on generating leads or sales for “high-consideration” purchases. These industries include: insurance (auto and health), financial services, home services, education, and automotive.

Top 10 Industries with Highest Call Volume

- ✓ Recreation and Leisure
- ✓ Insurance
- ✓ Financial Services
- ✓ Health and Wellness
- ✓ Home Services
- ✓ Education
- ✓ Computer and Electronics
- ✓ Legal
- ✓ Auto
- ✓ Travel

Average Call Durations for Top Industries

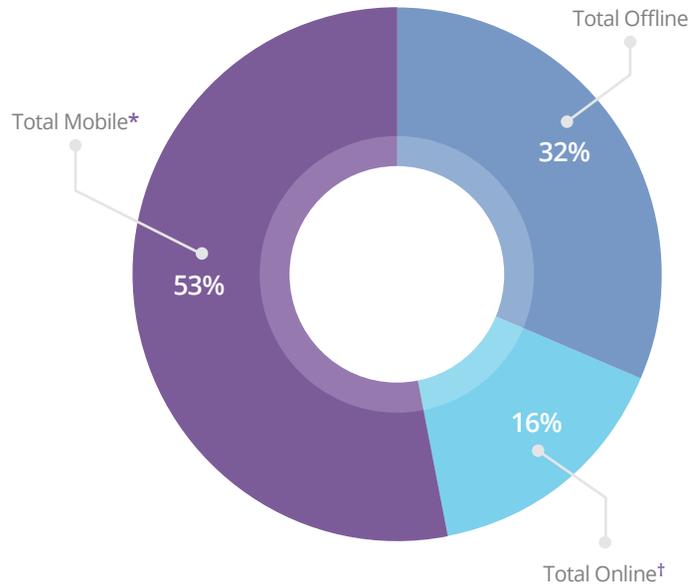


Top Call Sources for Each Industry



Home Services:

Digital marketers in Home Services are taking advantage of mobile search to drive phone calls. Mobile-specific channels drive **53%** of Home Services calls, with mobile search alone accounting for **41%** and mobile display accounting for **9%**.



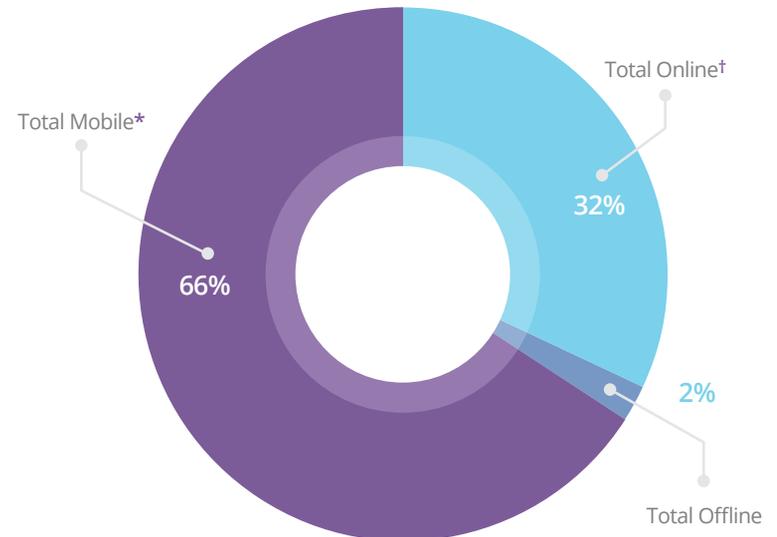
* Mobile includes mobile search, display, app, and mobile websites.

† Non-mobile



Education:

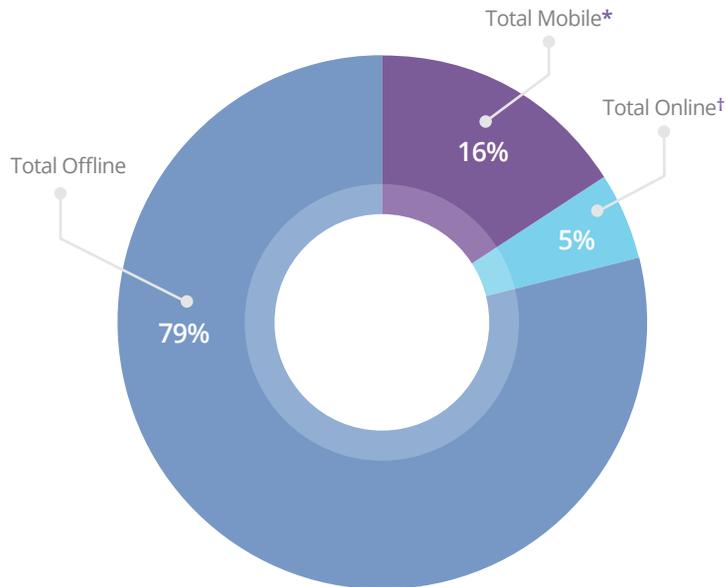
Education marketers are turning to digital channels to drive new student enrollments. The biggest source of calls comes from mobile search, which drives **56%** of all Education calls, followed by desktop search at **11%**.





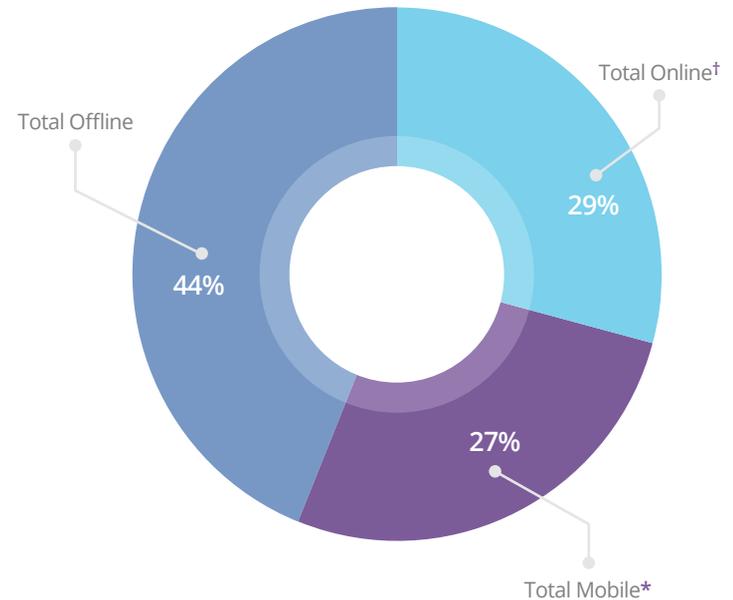
Automotive:

Automotive relies heavily on offline advertising, specifically television, which indicates a huge opportunity to expand into digital media. As a result of offline advertising, **57%** of Automotive calls come from landlines.



Financial Services:

While offline channels account for **44%** of Financial Service calls, mobile search is the single biggest source of call volume accounting for **21%** of all calls.



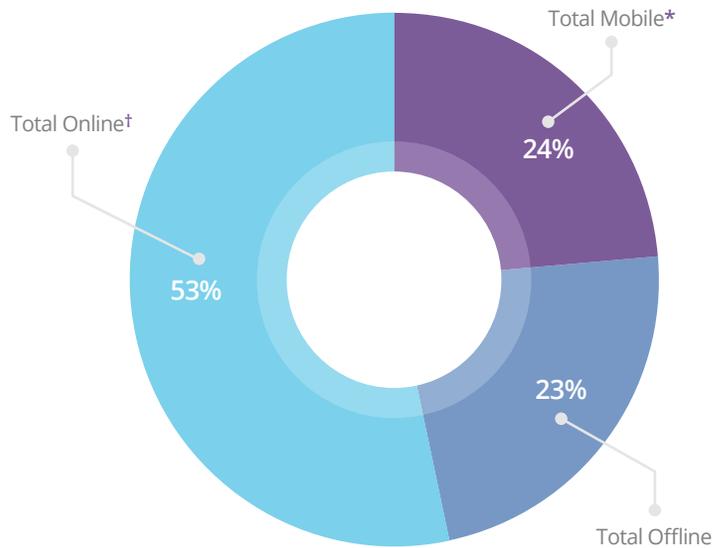
* Mobile includes mobile search, display, app, and mobile websites.

† Non-mobile



Insurance:

While desktop channels drive more than **53%** of Insurance consumer-initiated phone calls, mobile search is the largest single source, accounting for **19%**. A significant number of Insurance phone calls also come from radio, which generated **7%** of phone calls.



* Mobile includes mobile search, display, app, and mobile websites.

† Non-mobile

SUMMARY

The marketing landscape has dramatically changed under the force of mobile. Marketers have more opportunities to connect with consumers in meaningful, convenient, and innovative ways than ever before. The key to unlocking mobile's potential is thinking beyond the digital realm. Consumers blend real-world and digital interactions for a better overall buying experience. It's time marketers aim to do the same.

With emerging solutions like call intelligence, it's easy to bring phone calls to the marketer's digital dashboard. Call intelligence is the key to creating, tracking and optimizing powerful online to offline customer experiences.



REPORT METHODOLOGY

Invoca analyzed 32 million phone calls, a representative sample of calls that ran through its platform between January 1, 2014 to December 31, 2014. The calls spanned over 40 verticals and sub verticals. The top five verticals in terms of call volume include:

- Insurance (Health, Auto, and Life)
- Home Services (Cable/Internet Providers, Home and Garden Services, etc.)
- Financial Services (Credit Repair, Loan/Mortgage, Refinancing, etc.)
- Education (Adult education, For Profit Universities)
- Auto (Auto dealers)

Sources

1. Teradata, 2015 Global Data-Driven Marketing Survey...
2. Conversion Sciences via marketingland.com
3. Google, The Role of Click to Call in the Path to Purchase
4. Invoca proprietary data
5. ExactTarget, 2014 Mobile Behavioral Report
6. See 3
7. New Voice Media
8. BiA/Kelsey, Phone Calls: The New Currency of the Smartphone Era
9. Luma Partners
10. See 3

Explanation of terms:

Online Channels: Any digital channel that is not designated specifically as “Mobile” falls under online channels. This includes email, search, display, and organic.

Mobile Channels: These are mobile-only channels used to target people on their mobile device. This includes mobile search, mobile display, mobile apps and mobile websites.

Search: Paid search media that is typically purchased on a pay-per-click basis from platforms like AdWords and Bing.

Display: Banners running on websites, including retargeting. This media is typically purchased on an impression bases (CPM).

About Invoca

Invoca helps the modern marketer drive inbound calls and turn them into sales. By bringing call intelligence to marketers and their existing marketing technology systems, Invoca's platform delivers the visibility required to engage mobile customers beyond the click. From attribution to intent, marketers gain a complete understanding of the customer's journey across digital, mobile and offline touch points so they can optimize their marketing spend, drive quality inbound calls and deliver a better customer experience. Founded in Santa Barbara in 2008, Invoca has powered more than \$2.5 billion in sales for its customers and is backed by Salesforce Ventures, Accel Partners, Upfront Ventures and Rincon Venture Partners.

For more information, please visit
www.invoca.com or call 855-383-2650