



The Role of Video and Mobile for the 2012 Wireline Shopper

Google/Compete, U.S.

June 2012

Methodology

Goal was to better understand how the online consumer shops for wireline services as well as any cross-channel implications

Compete conducted an online survey using panelists who researched or shopped for wireline services online within the past 6 months. Surveys were fielded May 10th - June 4th 2012. N=630

Using Compete's panel of 2M U.S. consumers, Compete measured consumer behavior within the industry in Q1 2012

Compete also measured wireless shopper query paths during Q1 2012

We **tracked** consumers online to understand their shopping habits and searching patterns



We analyzed the behavior of those purchasing **wireline services**, tracking their behavior backward from the point of purchase.



Surveyed wireline buyers to understand their purchase behavior.



The role of video

More shoppers are watching wireline videos online

Online video plays a role in the evaluation process

Shoppers are 2x more likely to watch online wireline videos in 2012 than 2011



Smartphone and tablet adoption is driving an increase in video use

- Tablet owners (**21.2%**) are more likely than non-tablet owners (**12.5%**)
- Smartphone owners (**20.3%**) are more likely than non-smartphone owners (**10.1%**)

Important segments rely more heavily on video

Movers and switchers are more likely to view wireline online video



24.2%

of recent movers
watched online video
about wireline service

vs.

12.6%

of non-movers used
online video



21.6%

of switchers watched
online video about
wireline service

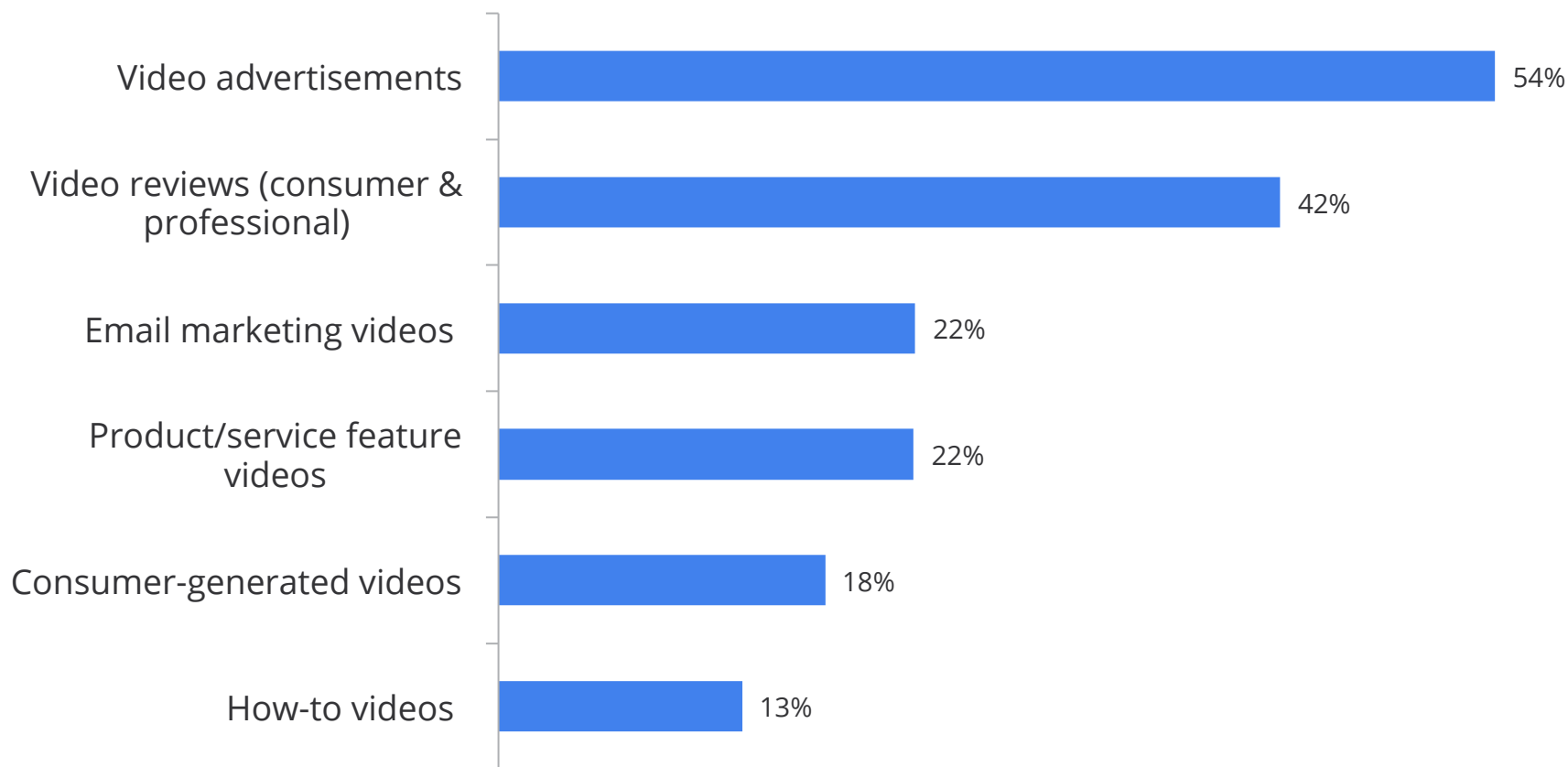
vs.

11.8%

of people who didn't
switch providers used
online video

Shoppers watch ads & reviews when using online video to research wireline services

Types of online videos consumers watched while shopping for wireline services



Online video drives shoppers to take action

The majority of video viewers look up the wireline service advertiser

77.6%

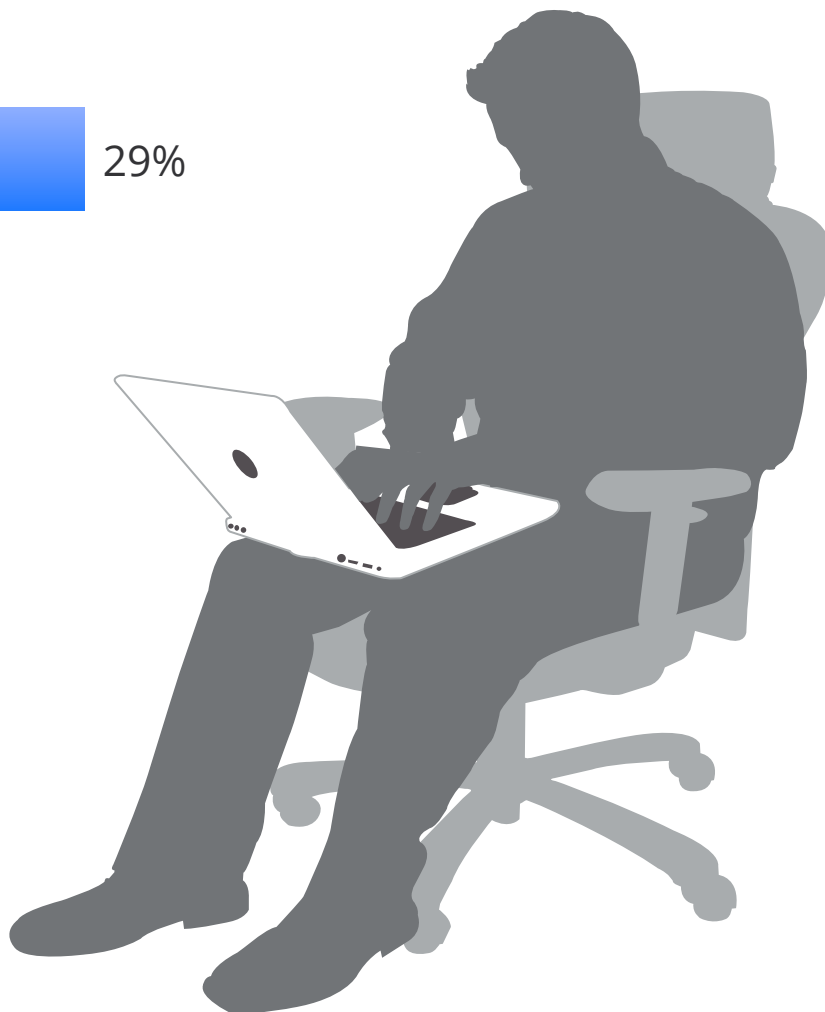
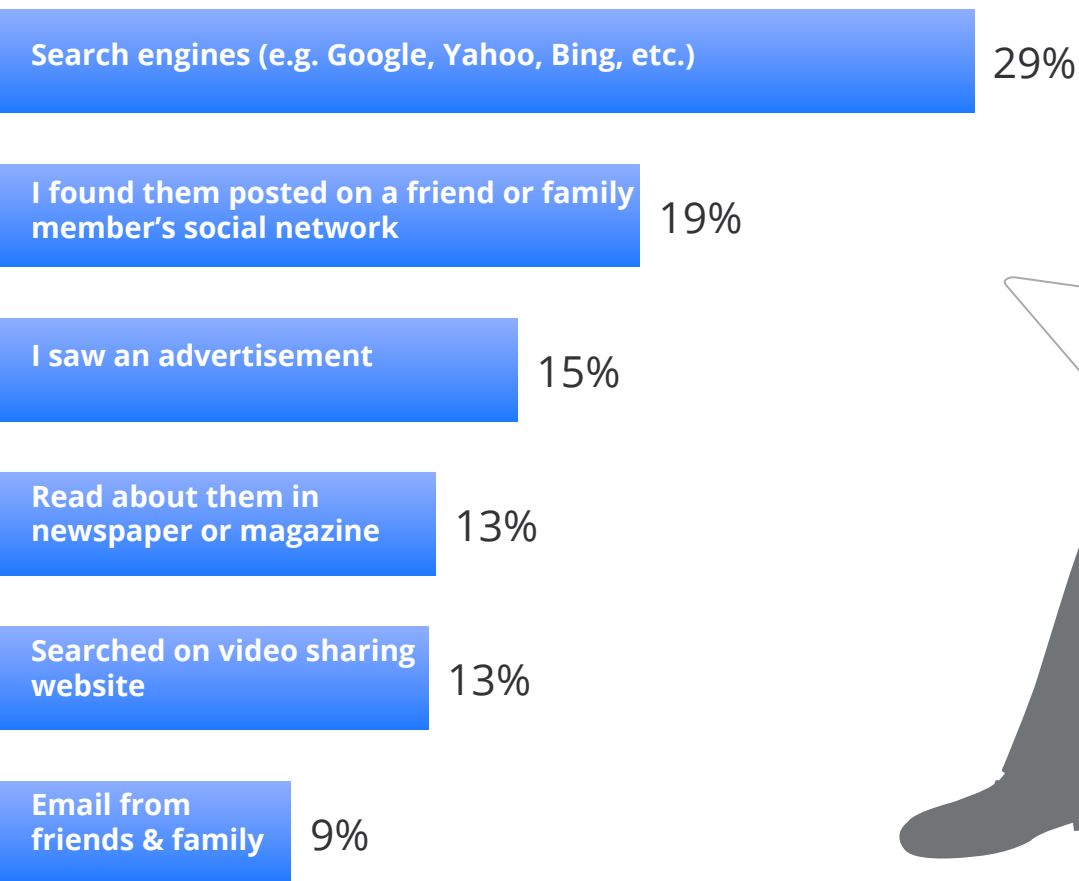
of respondents who saw an online video ad looked up the wireline service advertiser for more information



Consumers discover video through search

42% first find videos via search engines or searching on video sites

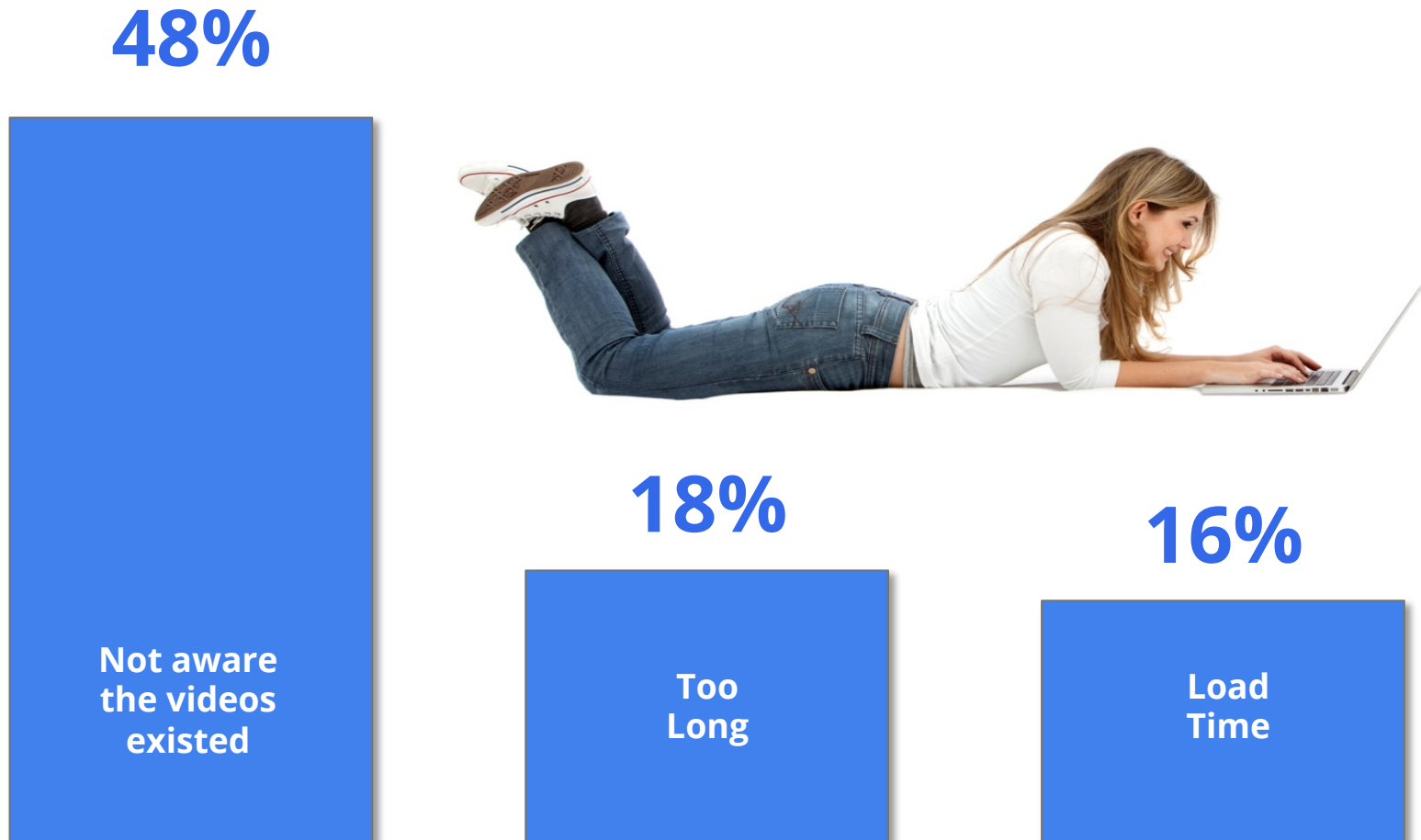
How did you first hear about the videos you watched online?



Online video has room to grow

Awareness, execution and load time can be improved

Main reasons for not watching online video:

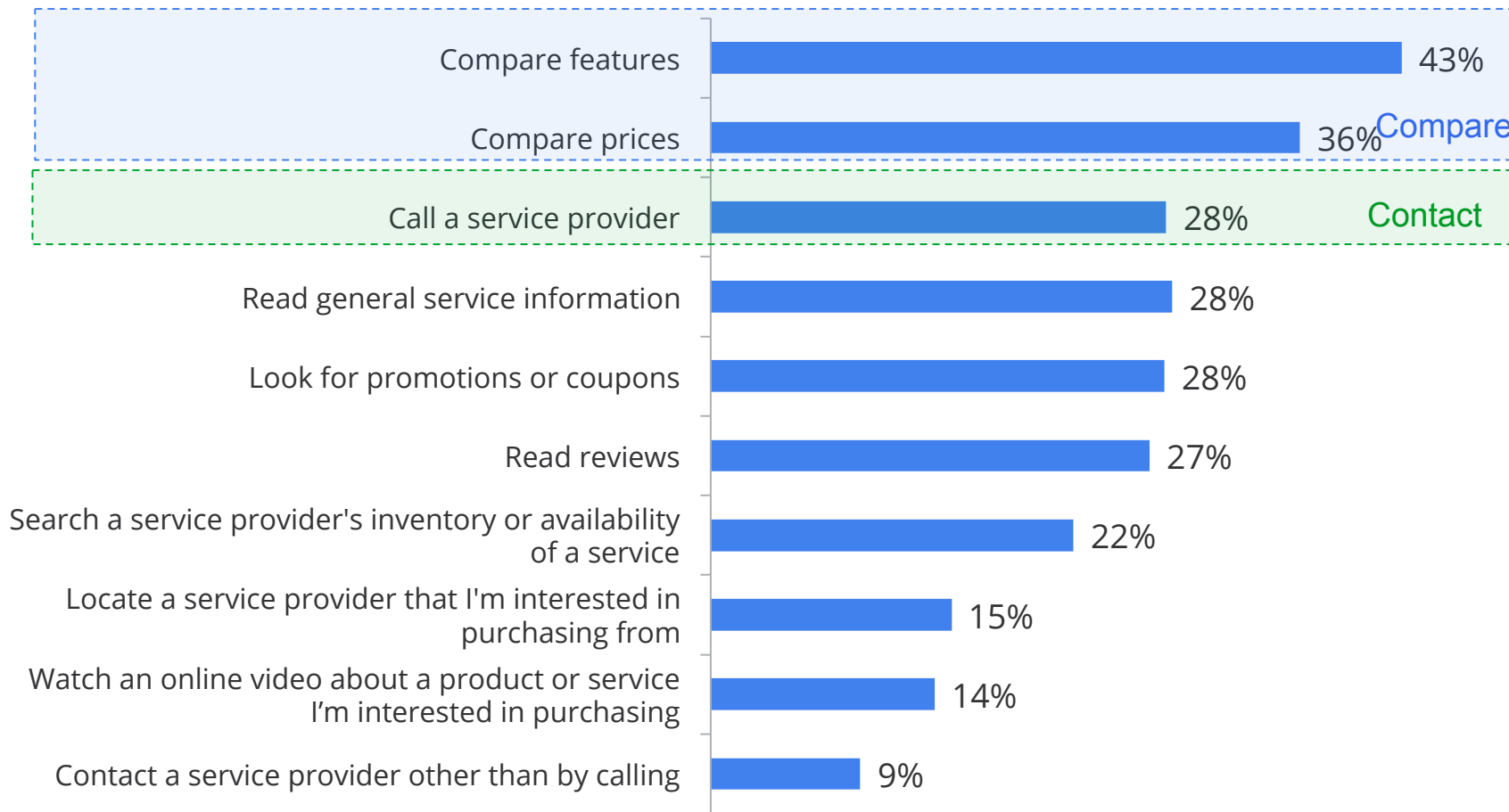


The role of mobile

Wireline research on the go

Mobile helps shoppers compare, contact providers

Research Activities on Mobile Device



Search is the #1 source used by wireline shoppers on a mobile device

Top Sources (Any Mobile Device)



71%

Search Engine



63%

Service Provider Website



38%

Social Networking Website



32%

Consumer Generated Online Review



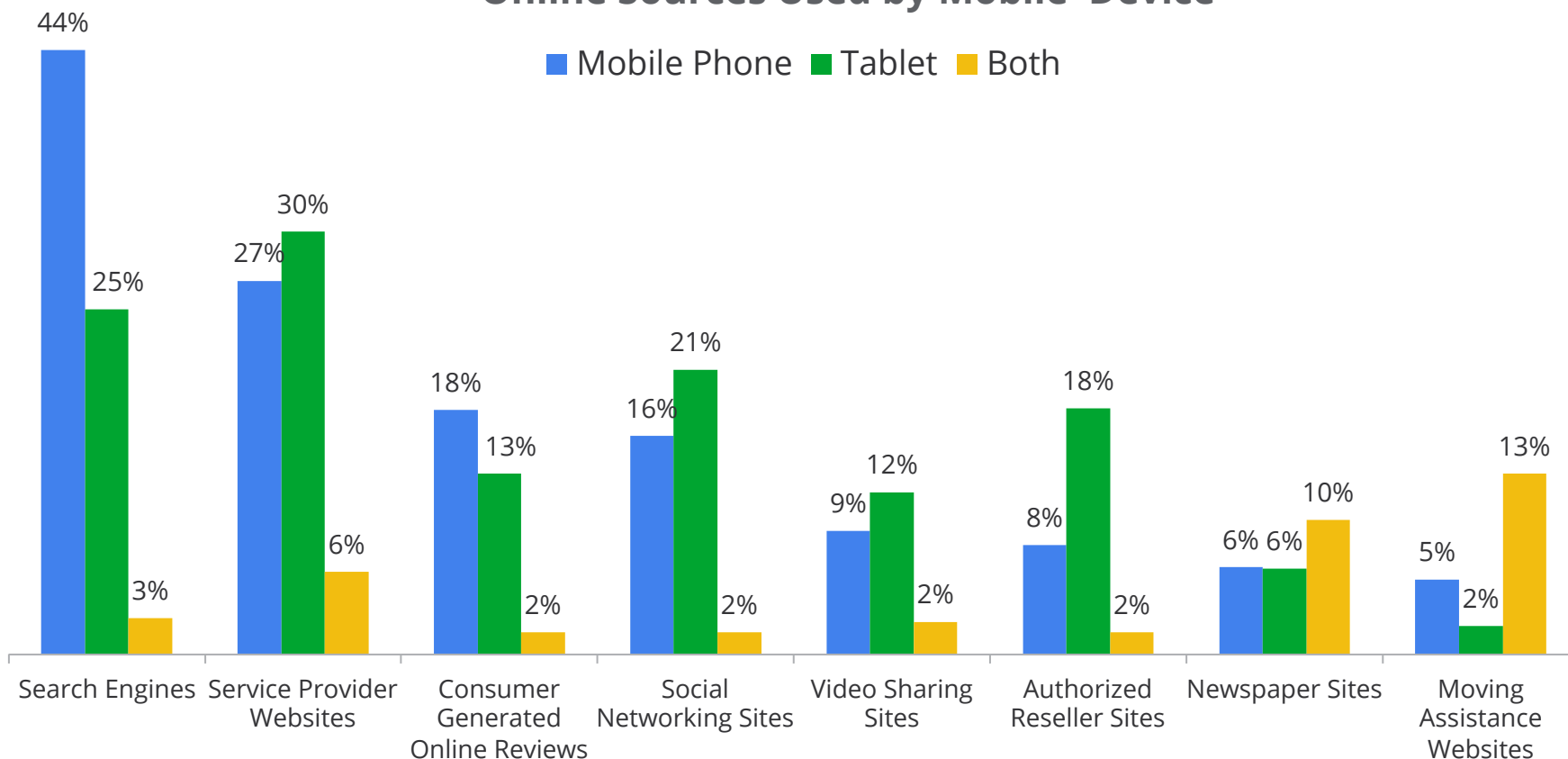
27%

Authorized Reseller Website

Sources vary by mobile device

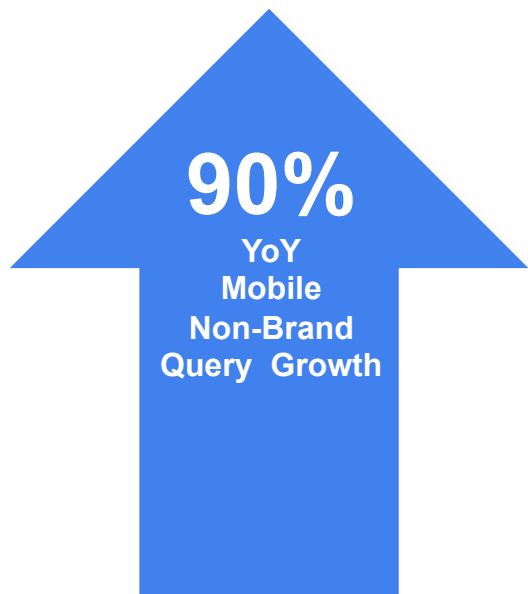
Search engines used most on phones, provider sites used most on tablets

Online Sources Used by Mobile Device

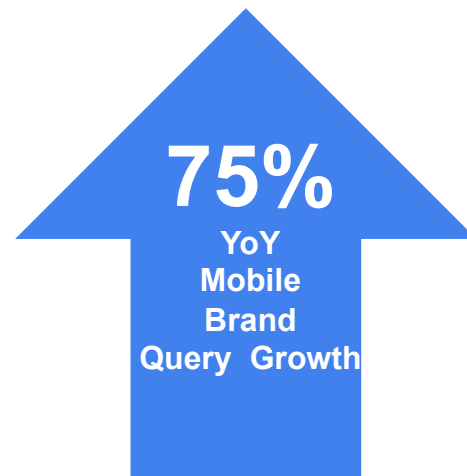


Mobile shoppers increasingly use search

1 in 5 non-brand wireline queries is made on a mobile device

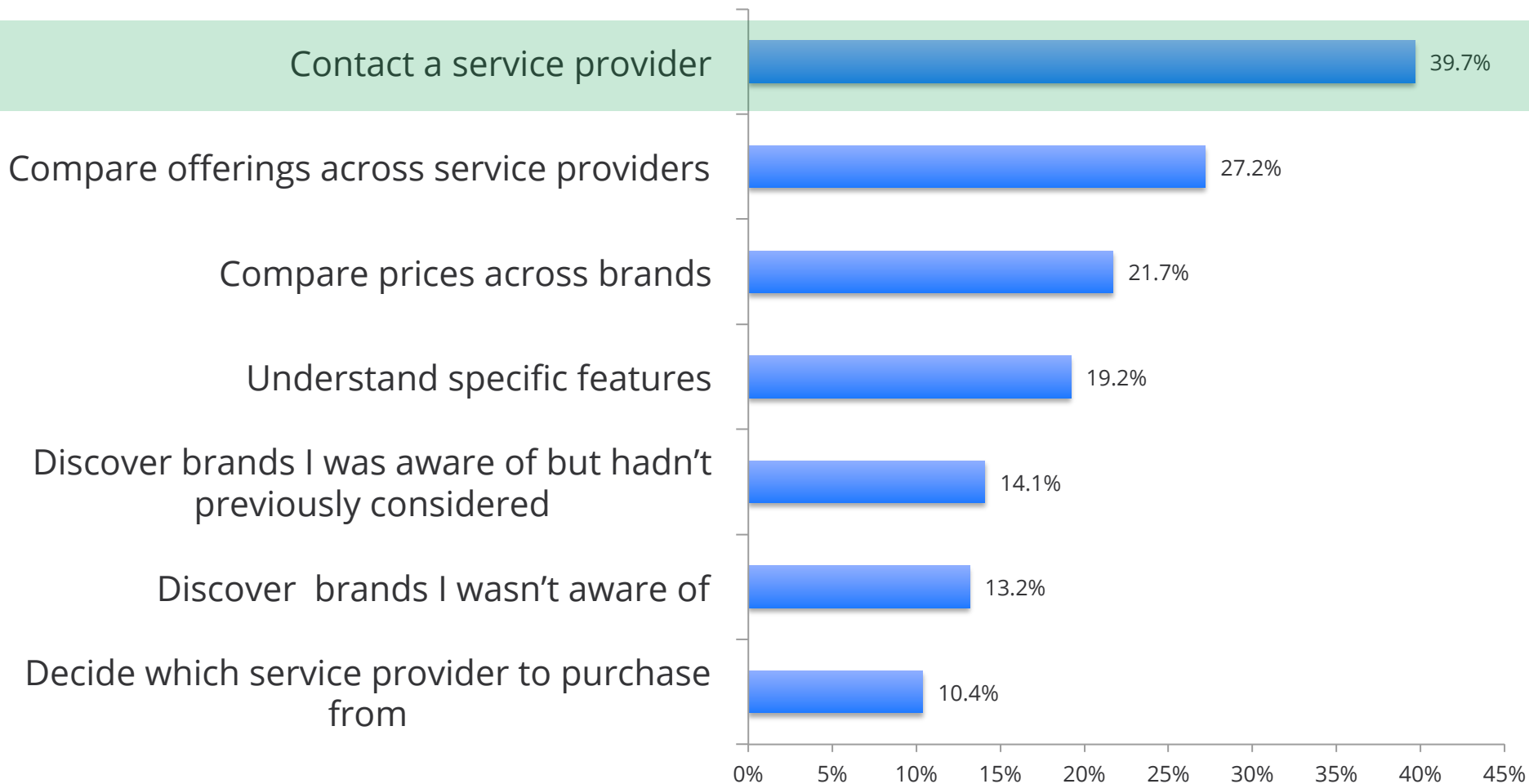


1 in 4 brand wireline queries is made on a mobile device



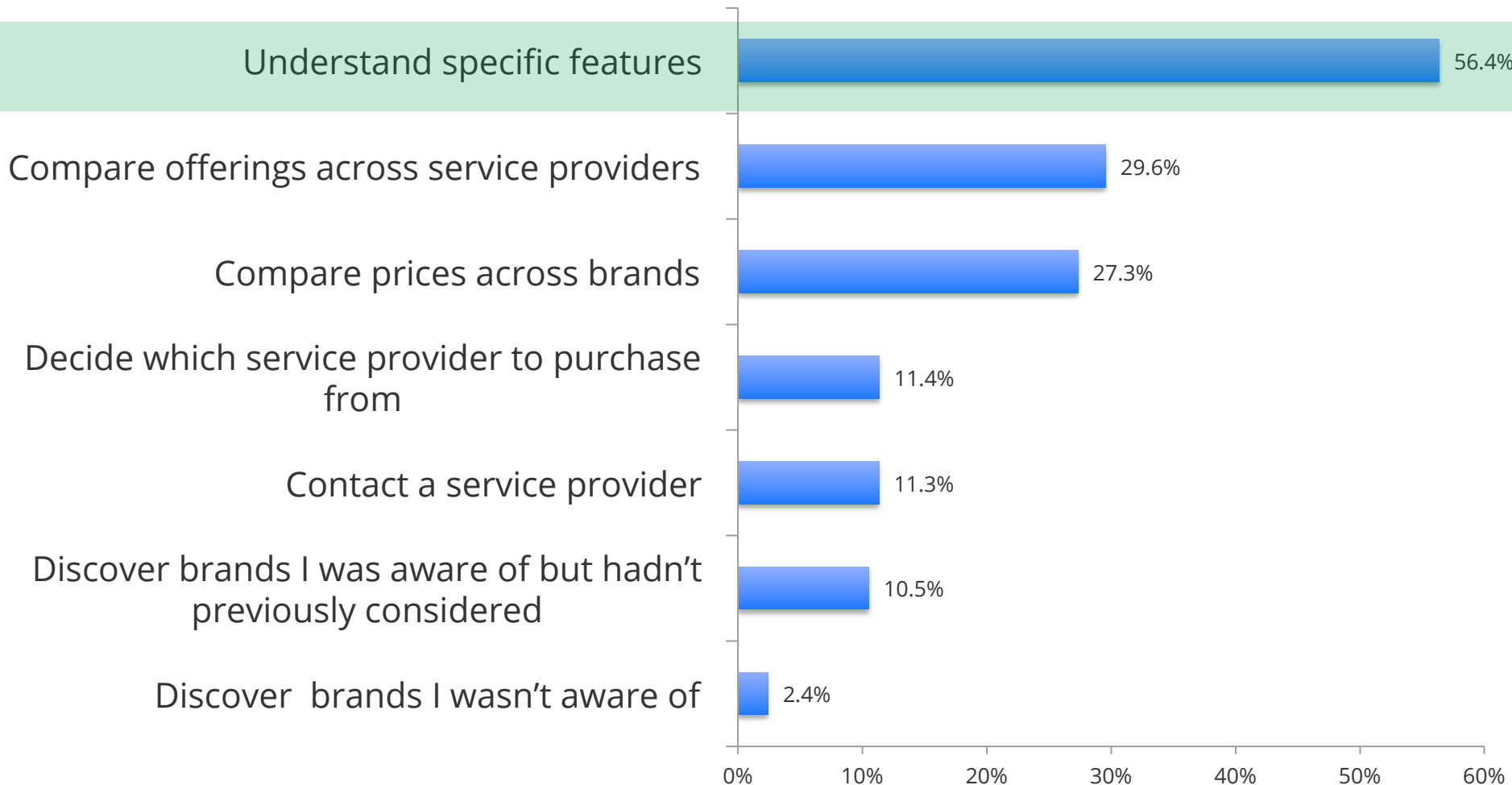
Search connects mobile shoppers with providers

How Search Engines Helped Consumers Shop on their Mobile Device



Provider sites help explain features

How Service Provider Sites Helped Consumers Shop on the Mobile Device



Key Takeaways: Video & Mobile

- 1 Wireline shoppers that use online video has doubled from last year.** Online video has become a part of the wireline research process; make sure it is part of your marketing plan.
- 2 Online video viewers take action:** 77.6% of respondents who saw an online video ad looked up the wireline service advertiser for more info
- 3 Online video has room to grow:** 48% of customers are not aware that wireline videos exist. Use media to drive awareness of your videos.
- 4 Search is the #1 source used by mobile researchers and is most likely to be used at the beginning of mobile research process.** Implement full coverage on mSearch, including category terms to reach undecided shoppers.
- 5 Mobile search helps shoppers contact service providers.** Enable click to call ads.