

# **Yellow Pages Calls Increased in 2010!**



## **March 2011**

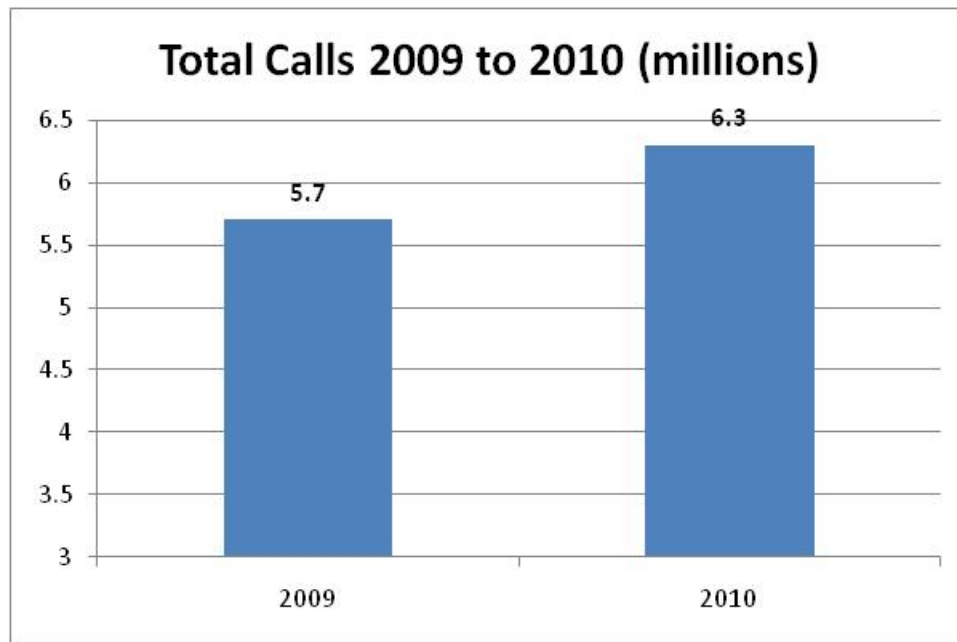
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The 2011 Metered Ad Study had 14,671 advertisers with the same size ad (and same UDAC) in the same heading tracked for both 2009 and 2010. These ads were in 771 different directories (ranging from distributions of 2k up to 2.3 million) representing the four largest publishers and were found in 740 different headings.

Across the entire set of ads, **calls increased by 10%** between 2009 and 2010, from 5.7 million calls in 2009 to 6.3 million calls in 2010. This increase follows a 3% increase in calls observed between 2008 and 2009.



*Based on a sample of 14,671 Yellow Pages advertisers.*

**60%** of advertisers saw an increase in calls in 2010 over 2009. These advertisers typically had calls increase by 41% in 2010. The 40% of advertisers that saw a decrease in calls typically saw a 23% reduction in calls. Across all advertisers, the typical change was an 11% increase in calls<sup>1</sup>. The disproportionate increases suggest that the content and competitive dynamics within the markets play significant roles. Advertisers who have better content, or who improve their content year-over-year, can win at the expense of their competitors.

<sup>1</sup> 11% represents the "median" increase across all advertisers. The "Average" increase was 30% .

### Call Changes by Product Type

The table below summarizes call changes by ad types. Calls are on the increase for each of the major ad types.

	<b>Advertisers</b>	<b>% with Increase</b>	<b>Median Increase</b>
Display	12114	59%	11%
Incolumn	973	61%	17%
Restaurant/Menu	434	67%	15%
Leader Ad	306	63%	21%
IYP	123	56%	10%

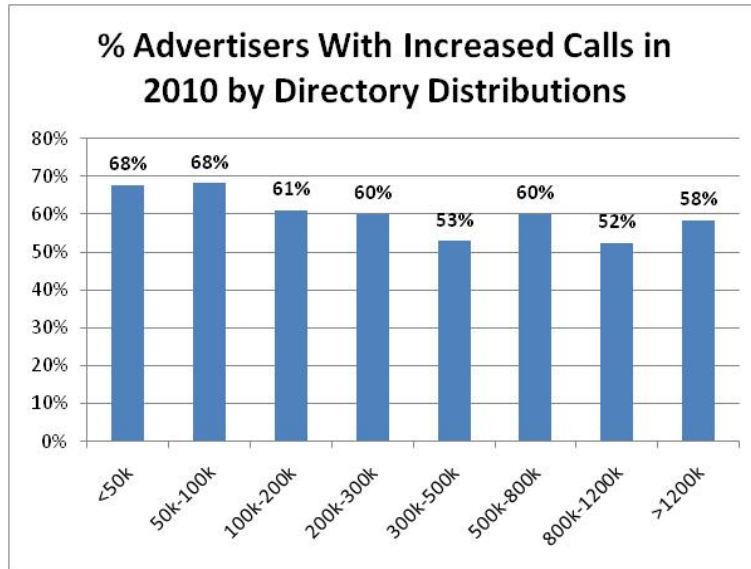
59% of display advertisers saw an increase in calls in 2010, with a median increase of 11% (average of 30%). 61% of incolumn advertisers saw an increase, with a median increase of 17% (average of 47%).

Two thirds of Restaurant and/or Restaurant-menu advertisers received an increase in calls in 2010, with a median increase of 15% (average of 34%). 63% of Leader Ad advertisers saw an increase in 2010, with a median increase of 21%.

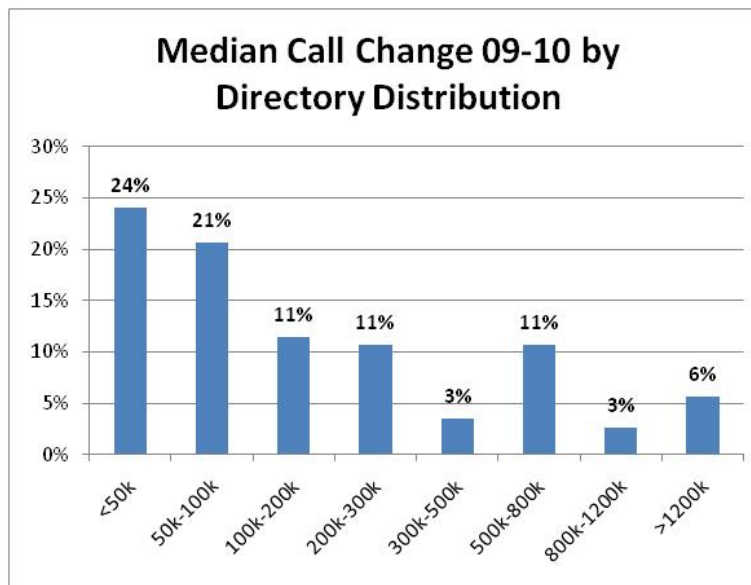
56% of IYP advertisers saw an increase in calls in 2010 with a median increase of 10% (average of 41%).

### Call Changes by Market Size / Directory Distributions

While the majority of advertisers saw an increase in calls for all markets, smaller markets saw the largest percentage of increases (see the figure below). Over two-thirds of advertisers (68%) received increased calls in 2010 for markets with distributions under 100,000. All other markets saw increases of between 52% and 61% of advertisers.



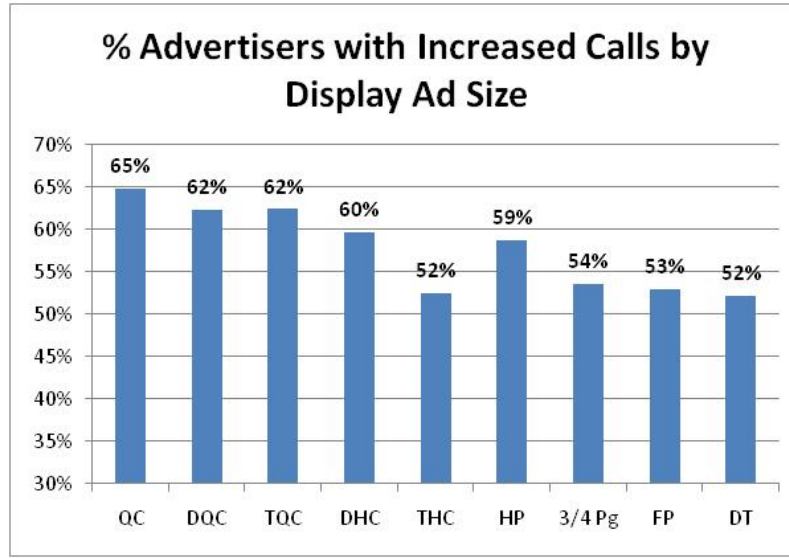
Similarly, the amount of call increase was highest in the smaller markets. Markets with distributions under 100,000 saw a typical increase of over 20% in call response. Markets with distribution between 100,000 and 300,000 saw a typical call increase of about 11%, and markets over 300,000 distributions saw increases of between 3% and 11%.



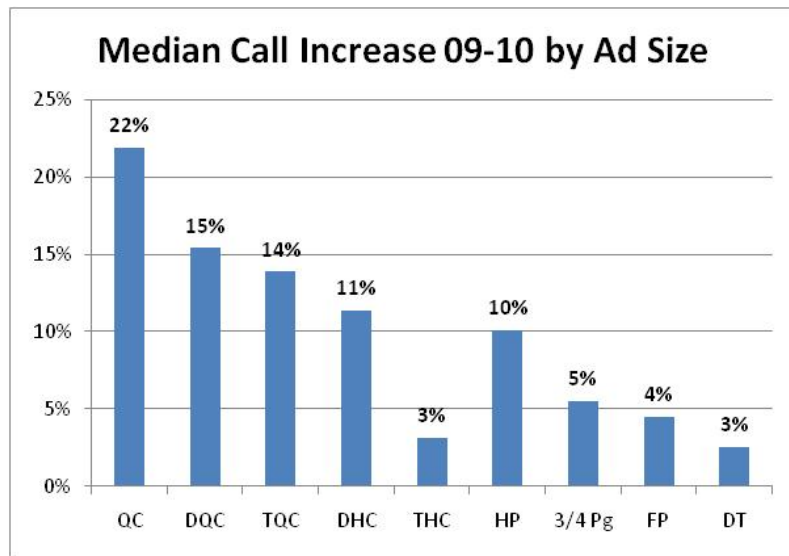
**Call Changes for Display Ads by Ad Size**

Advertisers with all sizes of ads saw increases in calls, although smaller ads were more likely to see an increase in calls than larger ads. Over 60% of advertisers with ad sizes of

a quarter page or less received an increase in calls in 2010. Between 52% and 55% of advertisers with ad sizes of 3/4 page or larger saw an increase in calls in 2010.



Similarly, the amount of increase was higher for smaller ads than for larger ads. The median increase was 22% for advertisers with a QC ad and 10-15% for advertisers with DQC to DHC (1/8 page to 1/4 page) ads. The median call increase was 3-5% for advertisers with ad sizes of 3/4 page or larger.



**Call Changes by Heading**

The table below lists call trends for 87 top headings, each with 25 or more advertisers tracked for both 2009 and 2010 with the same size display ad in the same heading. The table is read as follows: there were 36 advertisers with results tracked for both years for the Oils-Fuel heading. 78% of these advertisers received more calls in 2010 than in 2009, and the median call change was an 19% increase.

The ten headings with the largest call increases were: Attorneys-Social Security & Disability (57%), Hearing Aids (30%), Medical Equipment & Supplies (28%), Heating Contractors (28%), Attorneys - Accident, Personal Injury, & Property Damage(27%), Pizza (26%), Air Conditioning Contractors (26%), Transmissions-Auto (26%), Auto Body & Repair (24%), and Loans (23%).

<b>Display Only Heading</b>	<b>Advertisers</b>	<b>% with Increase</b>	<b>Median Change</b>
<b>Total</b>	<b>12114</b>	<b>59%</b>	<b>11%</b>
Oils-Fuel	36	78%	19%
Motorcycles & Motor Scooters-Dlrs.	25	76%	18%
Loans	83	76%	23%
Heating Contractors	138	75%	28%
Medical Equip. & Supls.	35	74%	28%
Attorneys -Social Security & Disability Claims	26	73%	57%
Pizza	55	73%	26%
Florists	73	73%	16%
Podiatrists	29	69%	17%
Restaurants	48	69%	18%
Signs	32	69%	6%
Furniture Dealers	67	69%	22%
Tranmission Auto	72	68%	26%
Beauty Salons	100	68%	17%
Tree Service	110	67%	13%
Chiropractors	131	67%	18%
Jewelers-Retail	33	67%	19%
Auto Parts & Supls.-Retail	27	67%	12%
Tire Dealers	83	66%	13%
Physicians & Surgeons	157	66%	16%
Attorneys -Divorce & Family Law	61	66%	15%
Contractors-General	46	65%	21%
Auto Repairing	485	65%	14%
Doors & Door Operating Devices	48	65%	11%
Funeral Homes & Directors	31	65%	15%
Air Conditioning Contractors	309	64%	26%

<b>Heading</b>	<b>Advertisers</b>	<b>% with Increase</b>	<b>Median Change</b>
Auto Dealers-New Cars	143	64%	19%
Auto Body & Collision Repair	137	63%	24%
Locks & Locksmiths	91	63%	12%
Dentist Information Bureaus	408	63%	10%
Roofing Contractors	273	62%	14%
Child Care	42	62%	13%
Landscape Contractors	125	62%	11%
Attorneys -Accidents, Personal Injury & Property Damage	52	62%	27%
Hearing Aids	26	62%	30%
Pest Control Services	171	61%	12%
Hotels & Motels	74	59%	12%
Towing-Auto	74	59%	12%
Gutters & Downspouts	59	59%	17%
Storage Household & Commercial	217	59%	11%
Veterinarians	143	59%	7%
Home Health Care & Svces.	29	59%	8%
Carpet & Rug Dealers	106	58%	13%
Electric Contractors	138	58%	12%
Driving Instruction	26	58%	10%
Attorneys -Bankruptcy	82	57%	5%
Attorneys	1132	57%	9%
Insurance	435	57%	8%
Garage Doors & Openers	125	57%	9%
Plumbing Contractors	366	57%	8%
Fence	110	56%	11%
Lawn & Grounds Maintenance	32	56%	21%
Optometrists	68	56%	10%
Painting Contractors	68	56%	7%
Tax Preparation Svces.	34	56%	12%
Bathroom Remodeling & Design	36	56%	8%
Septic Tanks & Systems-Building, Cleaning & Repair	48	54%	7%
Attorneys -Criminal Law	50	54%	10%
Dentists	298	53%	5%
Water & Fire Damage Restoration	55	53%	8%
Rental Service	40	53%	2%
Windows	105	52%	3%
Printers	29	52%	2%
Limousine Svce.	35	51%	3%
Pawnbrokers	37	51%	4%
Carpet & Rug Cleaners	133	50%	2%
Appliances-Home-Dlrs. & Svce.	104	50%	0%
Bail Bond	46	50%	0%
Auto Dealers-Used Cars & Vans	30	50%	-3%
Housecleaning Svce.	30	50%	3%

Heading	Advertisers	% with Increase	Median Change
Optical Goods-Retail	26	50%	-1%
Glass-Auto, Plate, Window, Etc.	182	49%	0%
Movers	125	48%	-3%
Home Improvement & Remodeling	50	48%	0%
Tile-Ceramic-Contractors	25	48%	0%
Concrete Contractors	38	47%	-2%
Party Equip. & Supls.-Sales & Rentals	34	47%	-3%
Floor-Install, Refinish & Resurface	43	47%	-1%
Siding Contractors	26	46%	-3%
Swimming Pool Contractors, Dlrs. & Design	35	46%	-3%
Auto Parts & Supplies - Used	31	45%	-2%
Garbage, Rubbish & Trash Removal	55	44%	-6%
Real Estate	47	43%	-5%
Massage Therapeutic	26	42%	-7%
Chimney Cleaning	25	40%	-9%
Computers	45	33%	-5%
Computers-Svce. & Repair	65	32%	-10%

### Summary

Last year it was noted that calls to Yellow Pages ads increased about 3% between 2008 and 2009<sup>2</sup>. **In 2010, calls continued to increase, but at a faster rate of 10%.**

Furthermore, 60% of advertisers saw an increase in their ads. The majority of advertisers saw an increase in calls for all sizes of markets and all sizes of ads. Smaller markets and smaller ads received the largest increases in calls. All major types of products - display ads, incolumn/space ads, leader ads, restaurant/menu ads, and IYP ads received strong positive increases in calls.

At a time when many are claiming that Yellow Pages are dying, the data show just the opposite, that response to Yellow Pages ads grew in 2010 at double-digit rates. The hard performance measurement data show that clearly Yellow Pages has not lost its usefulness or relevance to consumers and businesses.

The data also show, however, that although calls to the medium are up, not every ad benefits from this increase. Competition for ads is fierce. Advertisers need to use the space they purchase in their ads to make the most compelling sales case to prospective customers. The content of the ad is critically important to the success of the ad.

<sup>2</sup> "Yellow Pages Calls Increased in 2009," CRM Associates, April 2010