

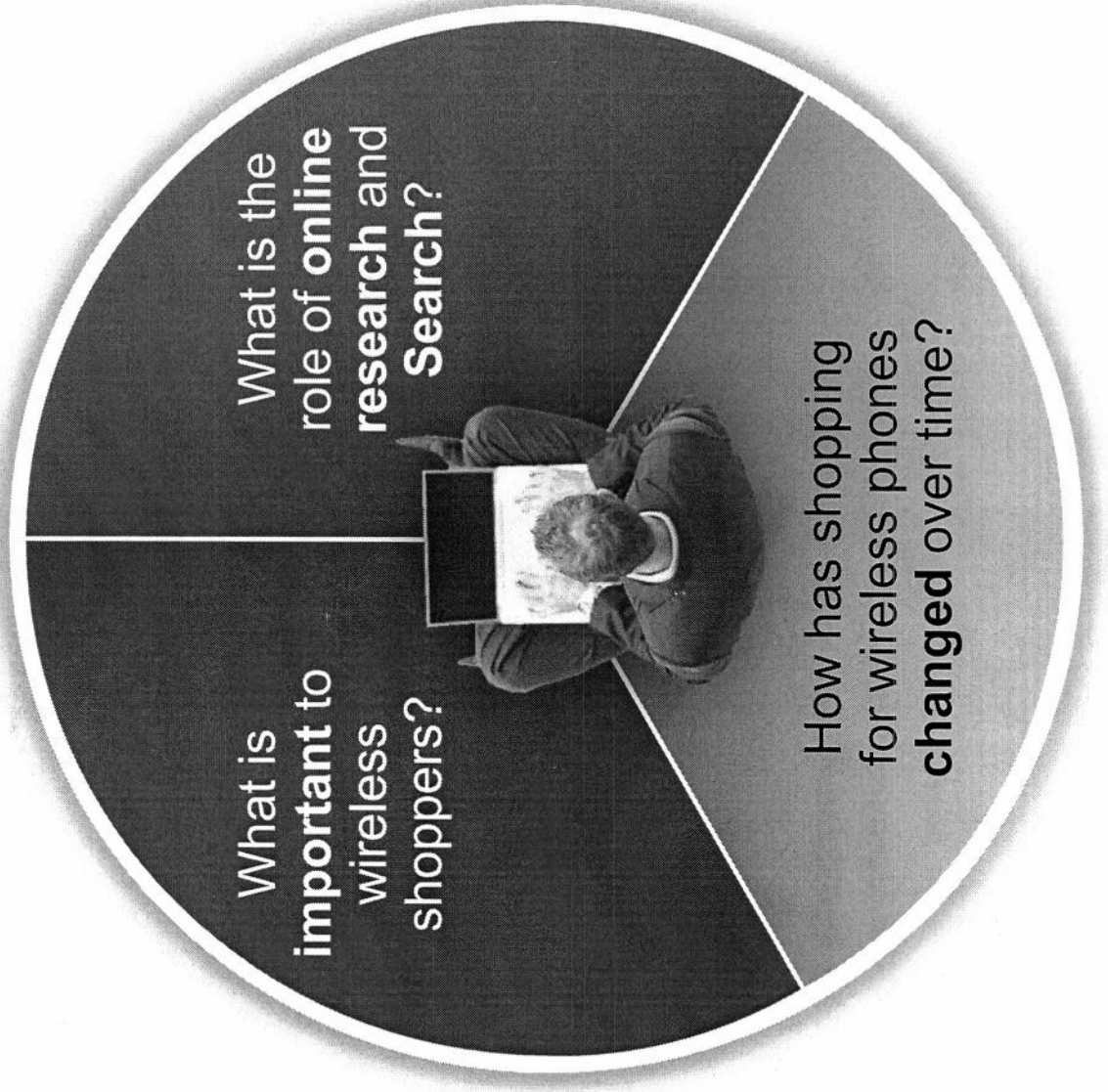
# EXHIBIT 30

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## Wireless Shoppers 2.0

How Consumers Shop for Wireless Phones  
Google Compete  
Clickstream and Survey Based Study  
U.S., Feb 2010

# How do consumers shop for wireless phones?



# Research Methodology

## Online Survey Component

- Interviewed a total of 2,961 online users who identified themselves as having purchased a wireless phone in the past 3 months
- Respondents were asked a variety of questions to understand factors influencing purchase and research.
- Interviews were conducted in July – October 2009.

## Behavioral Component

- Tracked online behavioral activity of 2MM U.S. Compete panelists
- Observed online visitation and search activity of wireless shoppers who reached the shopping cart of a Big-4 wireless carrier site (Verizon Wireless, AT&T, T-Mobile, Sprint) during Q2 2009
- Appended behavioral data to survey respondents to gain holistic picture of online engagement among wireless phone purchasers
- Sites and search terms for analysis were provided by Google

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**It's A Competitive Marketplace**

# Shoppers Have Little Loyalty

Service Provider

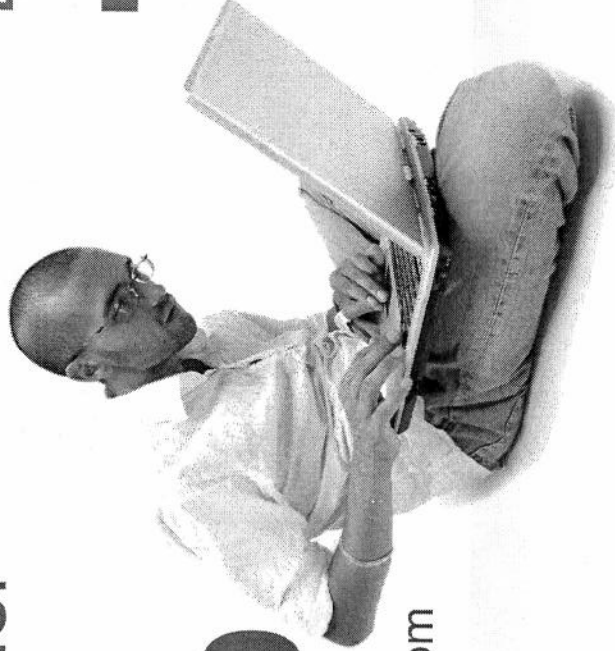
42%

did not know exactly which Carrier they would purchase from

Device

78%

did not know exactly which OEM they would purchase from



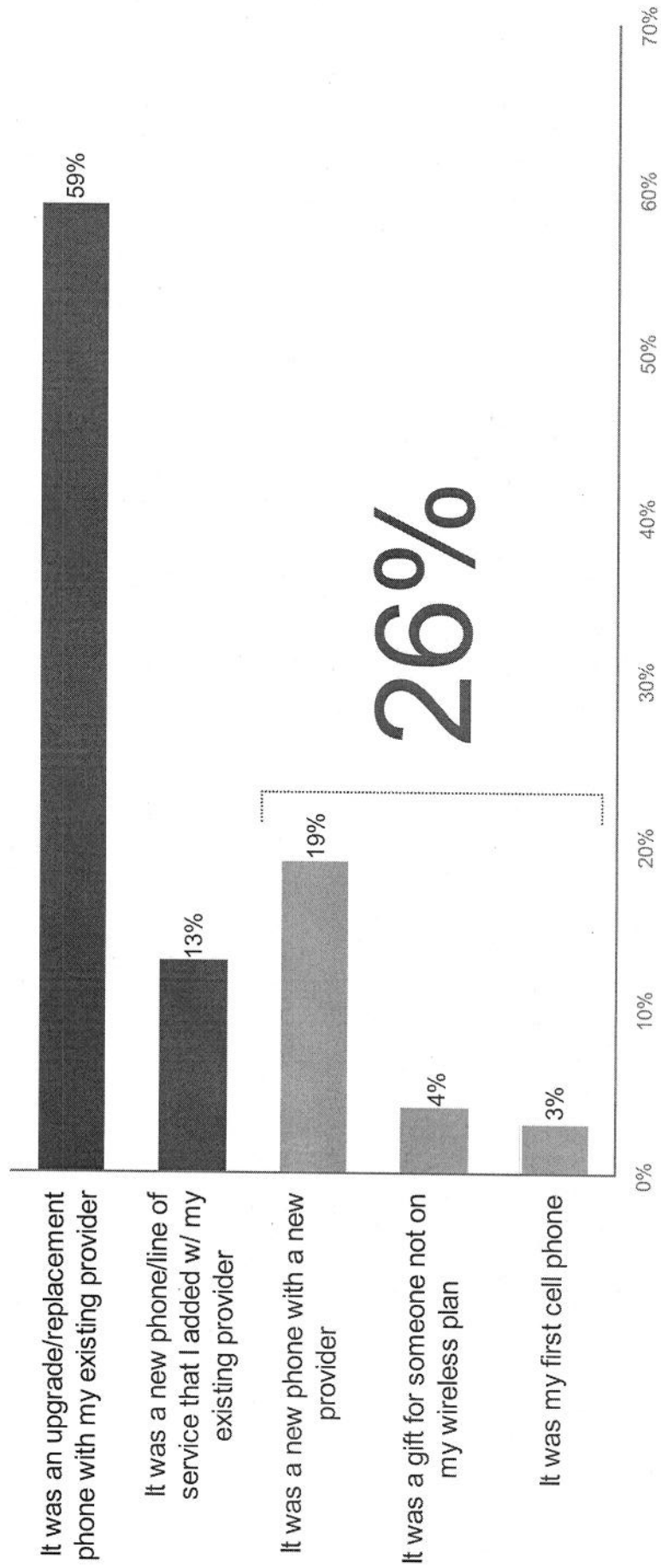
Q - When you first considered your most recent cell phone purchase, which statement best describes your mindset about the wireless service provider? (Total Respondents=2961)

Q - Which statement best describes your mindset about the brand of cell phone? (Total Respondents=2961)  
Source: Google/Compete Wireless Shopper 2.0 Study, January 2010.

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# 26% of Phone Purchasers Chose a New Carrier

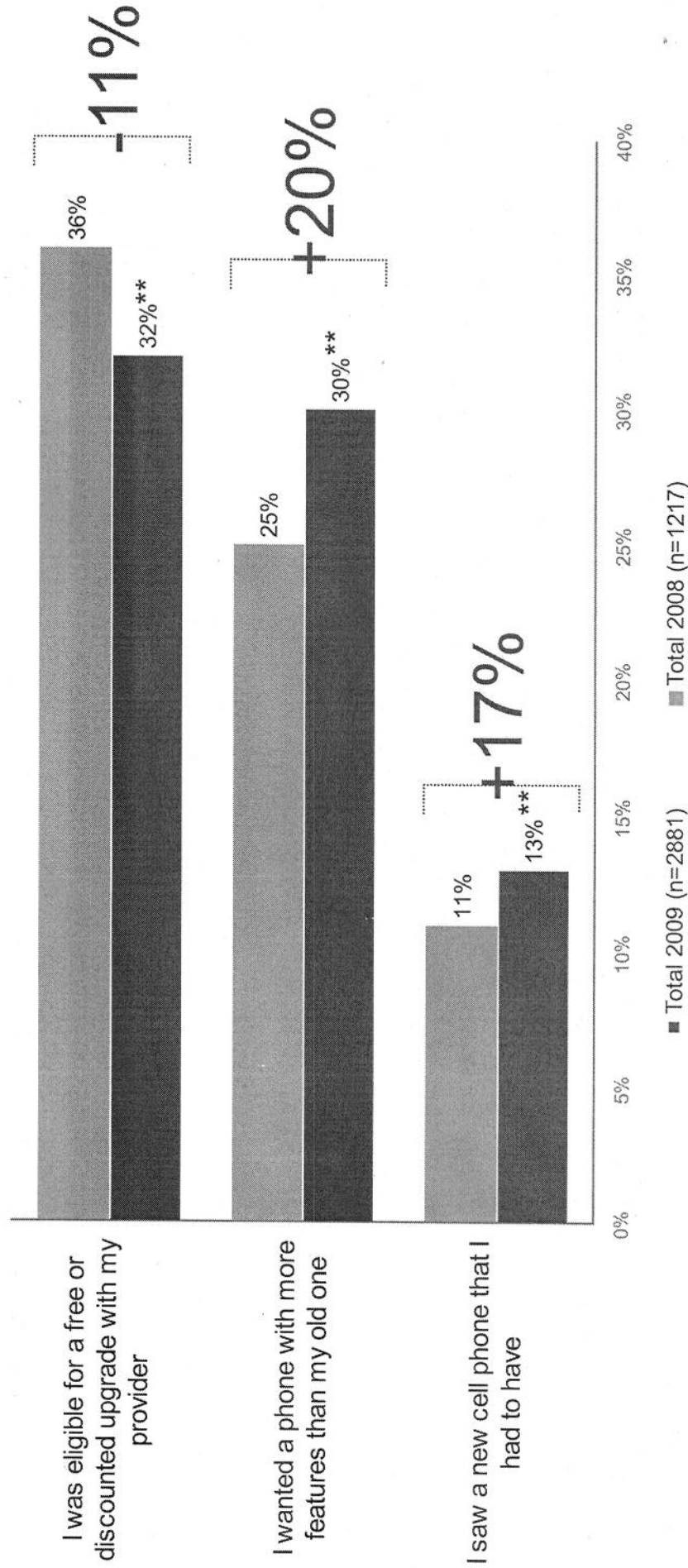
Most Recently Purchased Cell Phone



Q. Which of the following statements best describes your most recently purchased cell phone? (Total Respondents=2961)  
Source: Google/Compete Wireless Shopper 2.0 Study, January 2010.

# Consumers Seek Out Hot Phones and Features

Reason for Purchasing a Cell Phone  
(2008 vs 2009)

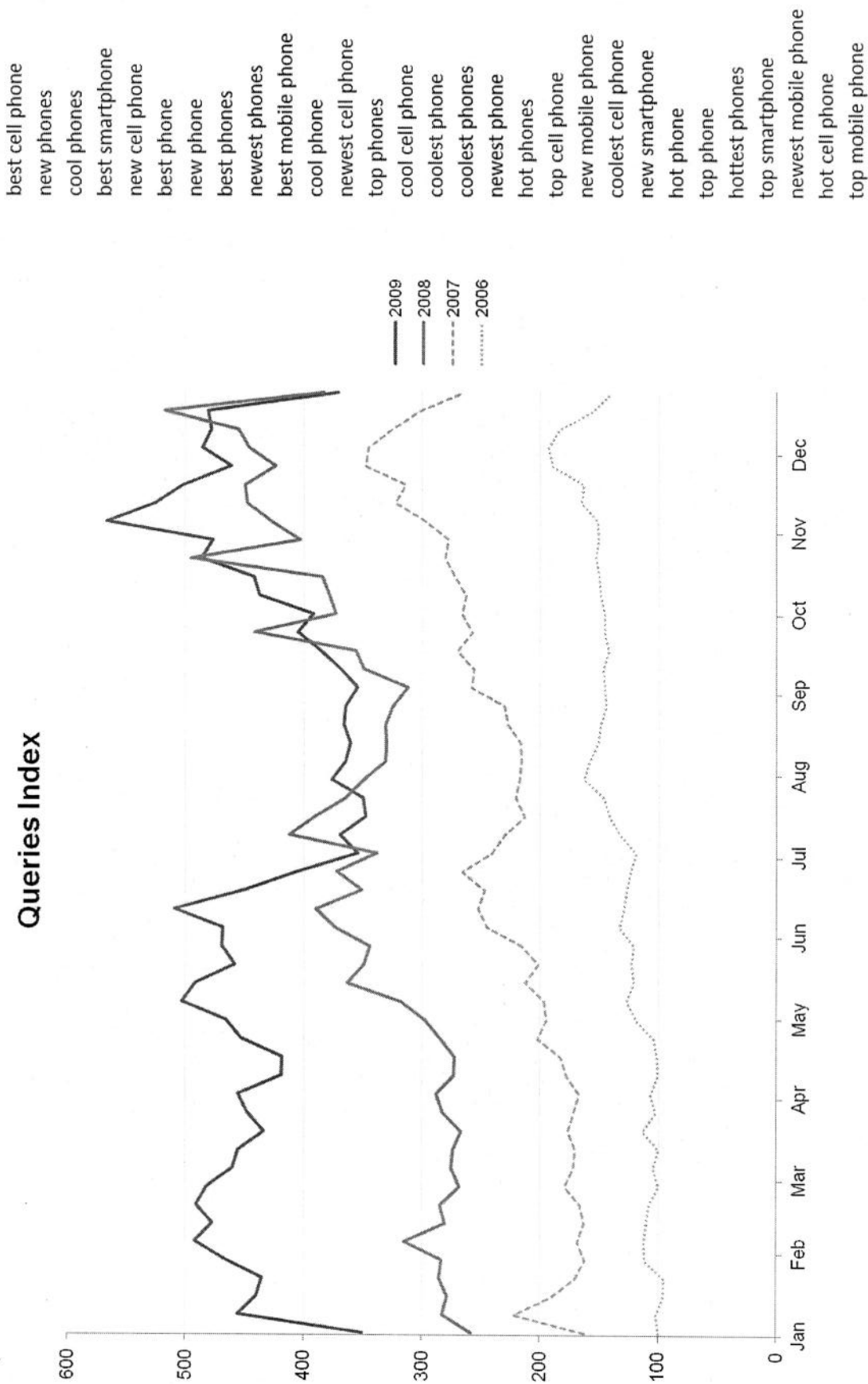


Q. Why did you decide to make this cell phone purchase? (n=2881, among those not purchasing first cell phone)  
Source: Google/Compete Wireless Shopper 2.0 Study, January 2010.

Q. Why did you decide to make this cell phone purchase? Please select all that apply. (n=1217, not first phone)  
Source: Wireless Shoppers Study, Google & Compete May 2008



# Interest in the Device Has Increased



Source: Google.com, US with Google

# Consumers Increasingly Research Online



# 29%

increase in the number of online resources used in research<sup>+</sup>

# 63%

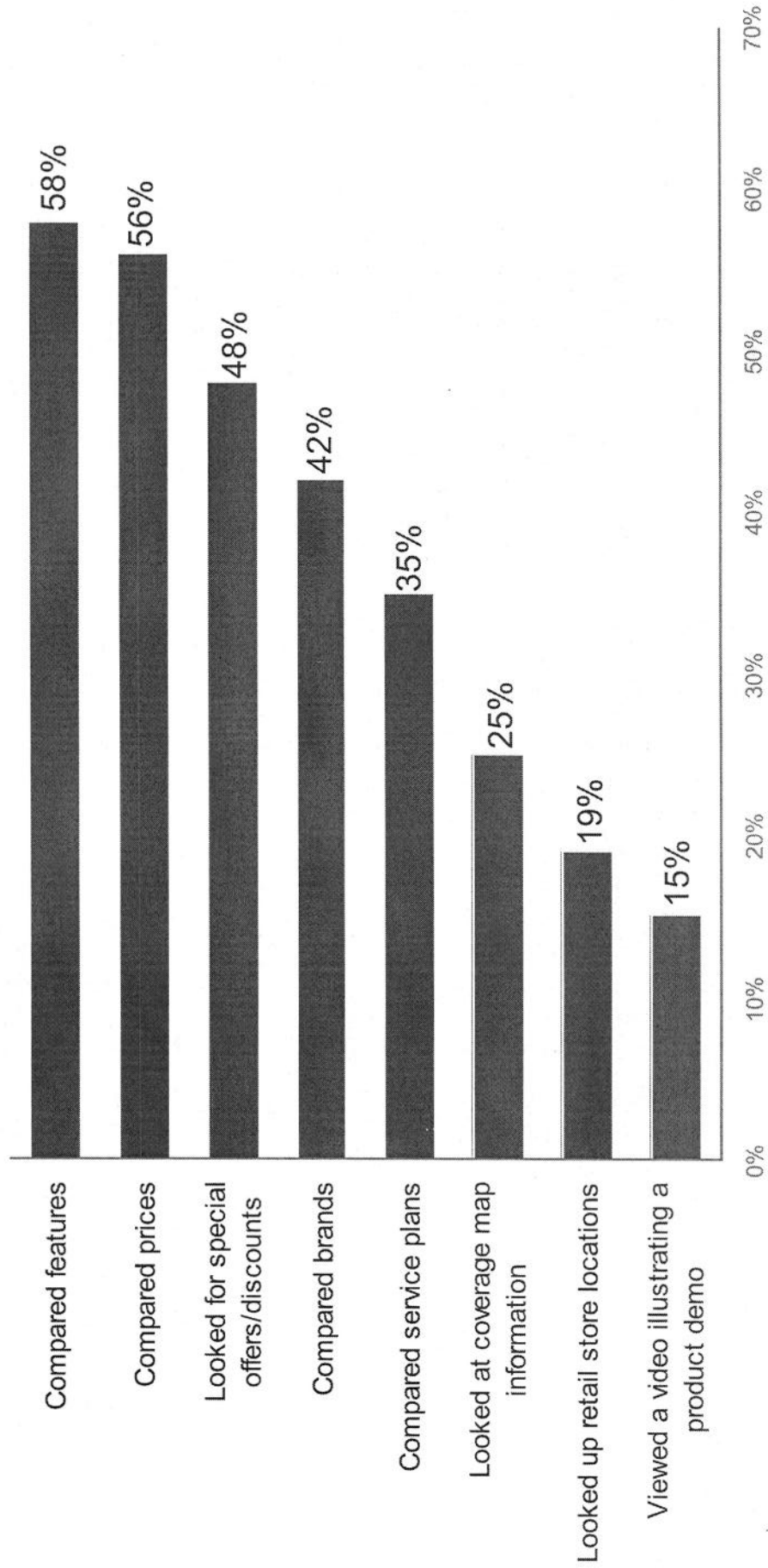
of people who bought phones in stores researched their purchase online

Q - Which of the following sources did you use to research your recent cell phone purchase? (Total Respondents=2961)  
+ As recalled by survey respondents in 2009 vs as recalled by 2008 survey respondents  
Source: Google/Compete Wireless Shopper 2.0 Study, January 2010.

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# Online Research is Comprehensive

Cell Phone Research Conducted Online

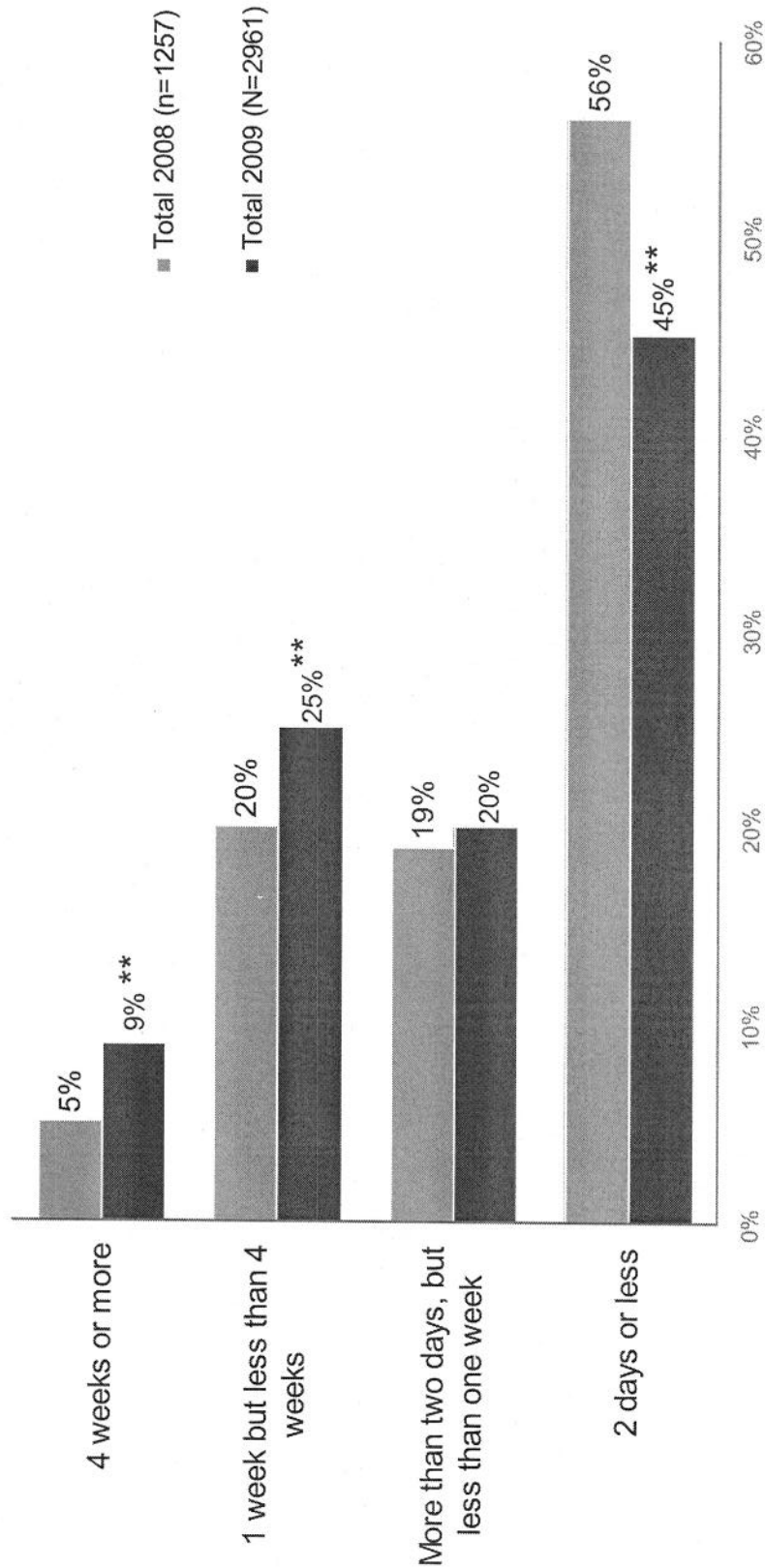


Q - Which of the following activities did you conduct online during your most recent cell phone purchase research process? Please select all that apply. (n=2057; shoppers that used online sources)  
Source: Google/Compete Wireless Shopper 2.0 Study, January 2010.



# Buyers Spending More Time Researching

Time Spent Researching Phone Purchase



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Q: How much time did you spend researching your most recent cell phone purchase? (Total Respondents=2916).

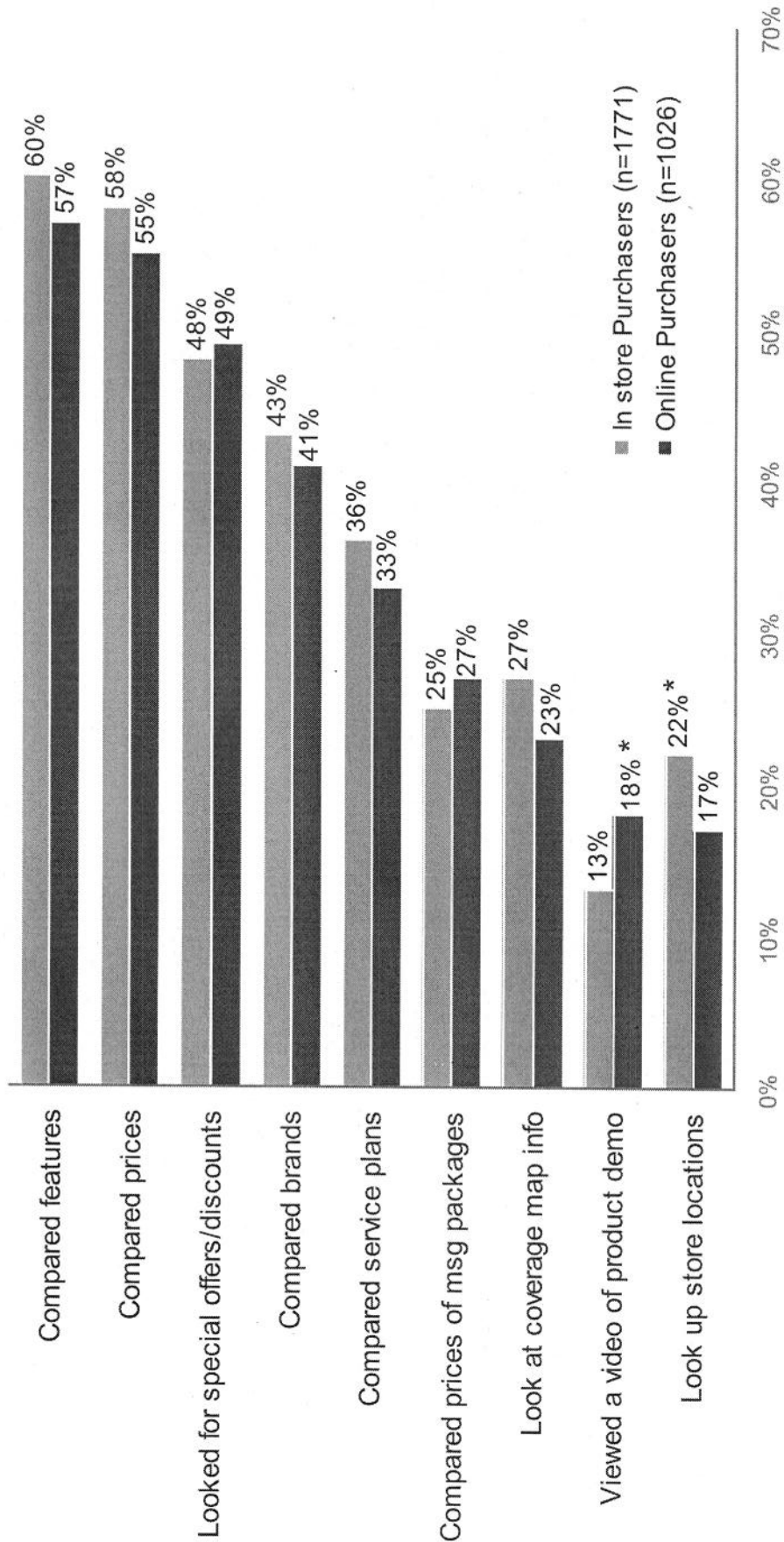
Source: Google & Compete Wireless Shopper 2.0 Study, January 2010.

Source: Wireless Shoppers Study, Google & Compete

Q: How much time did you spend researching your recent cell phone purchase? (N=1257, asked of recent wireless buyers, May 2008)

# Same Online Research to Buy Online or In-store

Type of Information Researched Online

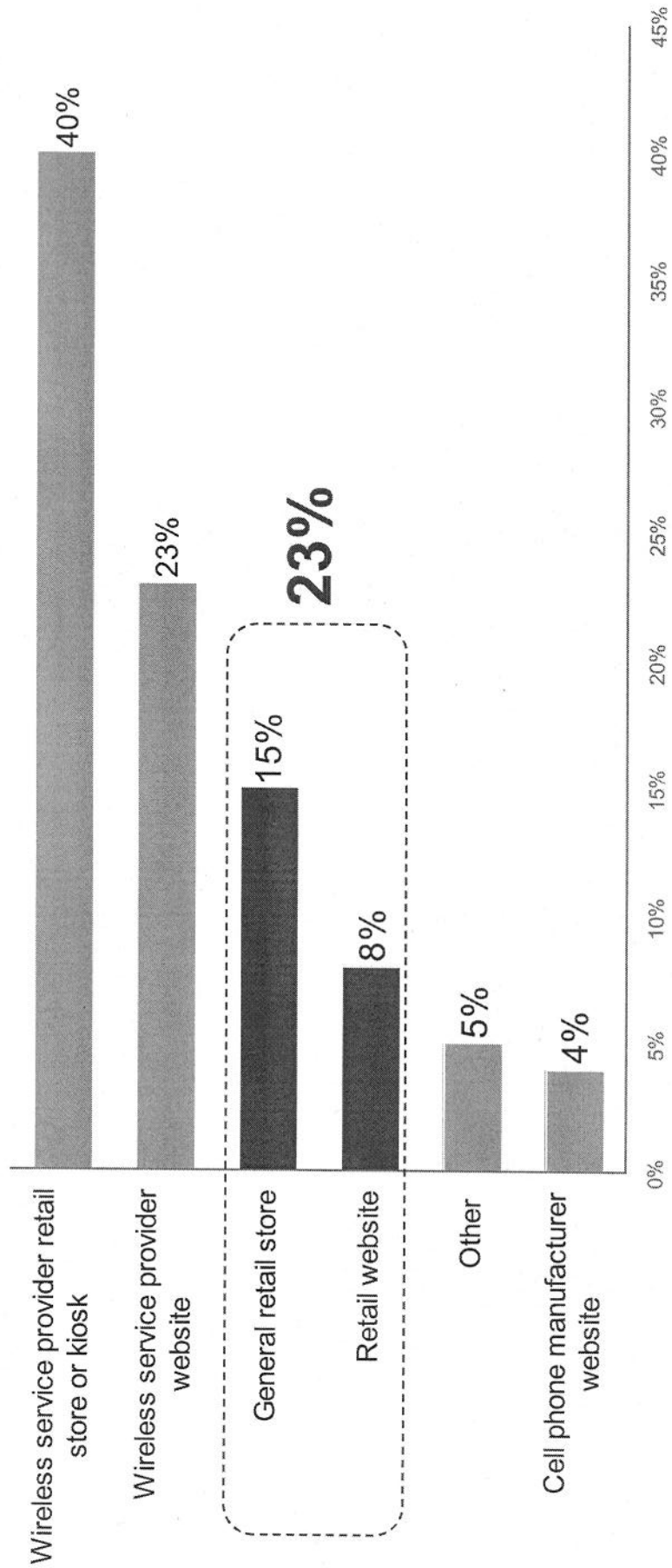


Q - Which of the following activities did you conduct online during your most recent cell phone purchase research process? Please select all that apply. (n=2057; based = shoppers that used online sources)  
 Source: Google/Compete Wireless Shopper 2.0 Study, January 2010.



# Retailers Have Captured Wireless Customers

Purchase Channel for Phone Purchase



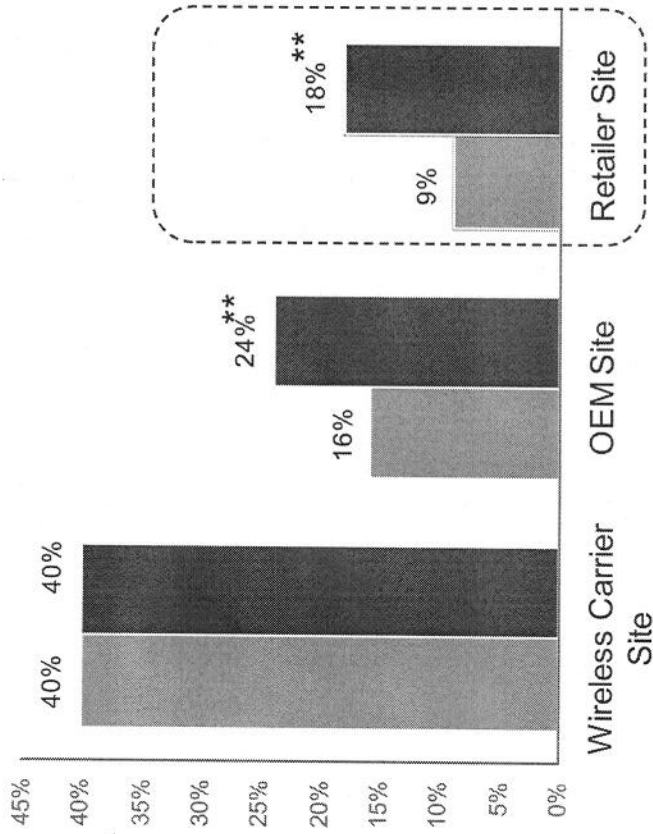
Q. - Where did you purchase your most recent cell phone? (Total Respondents=2961).

Online share of purchases was higher than actual due to online survey fielding. Actual online share is typically ~6% of carrier gross add orders  
Source: Google/Compete Wireless Shopper 2.0 Study, January 2010.

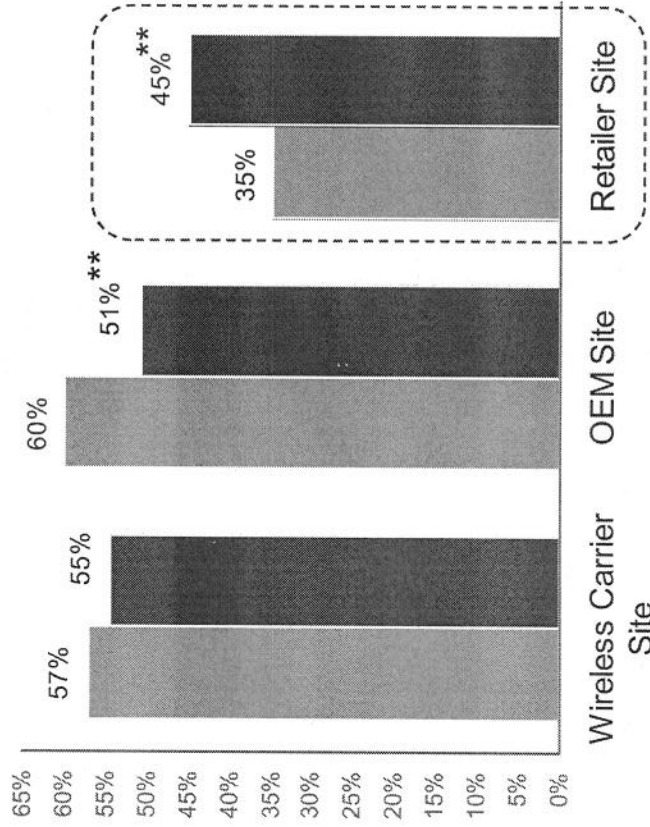
Note: Trajectory reports 17% of wireless phone sales through general retail stores in Q4 2009.

# Retailer Sites Are Increasingly Influential

Used During Research Process  
(2008 vs 2009)



Influential to Purchase Decision  
(2008 vs 2009)



■ 2008 ■ 2009

Q - Which of the following sources did you use to research your recent cell phone purchase? (Total Respondents=2961) Not all answer choices included on chart

Q - On a scale from 1 to 5, where 1 means no influence at all and 5 means significant influence, how much influence did each of the following have on your most recent cell phone purchase? Top 2 Box (Total Respondents=2961)

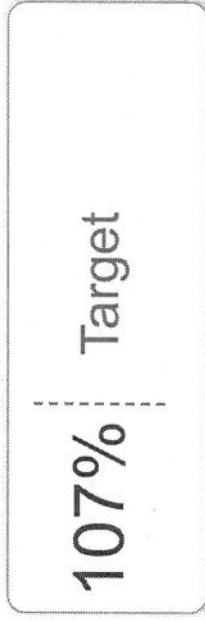
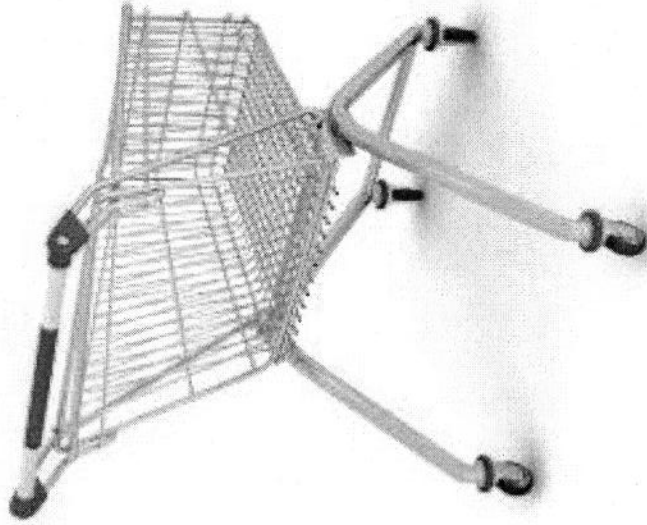
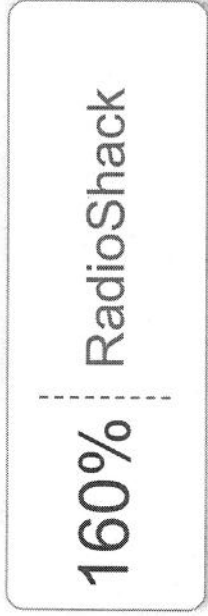
Q: Which of the following sources did you use to research? Asked of Recent Wireless Buyers, (N=1257)

Q: How much influence did each resource used have on your purchase? (Top 2 Box) Asked of Recent Wireless Buyers Who Used Resource. N=variable, May 2008. Source: Wireless Shoppers Study, Google & Compete 2008.

Google Confidential and Proprietary

# Retailer Sites Are Increasing Share of Voice

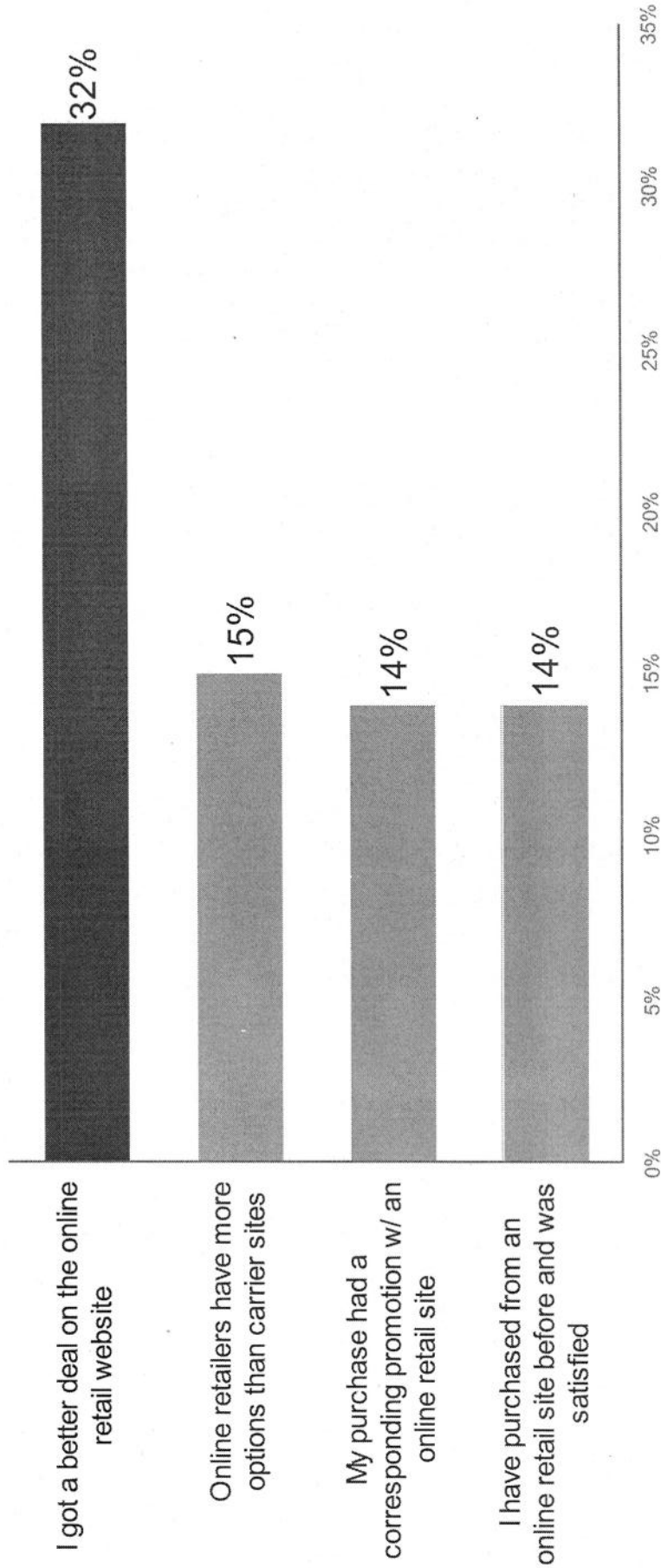
Website Traffic Growth Dec 2008 vs Dec 2009





# Retailer Sites Emphasize Pricing and Deals

Reason for Purchase at Online General Retailer Site



Q - On a scale from 1 to 5, where 1 means no influence at all and 5 means significant influence, how much influence did each of the following have on your most recent cell phone purchase? (n=229, those that purchased through an online retail website).  
Source: Google/Compete Wireless Shopper 2.0 Study, January 2010.

It's a  
Competitive  
Marketplace



The consideration and research phase is longer and **more complex**

Online research is **comprehensive and integral** to purchase decision

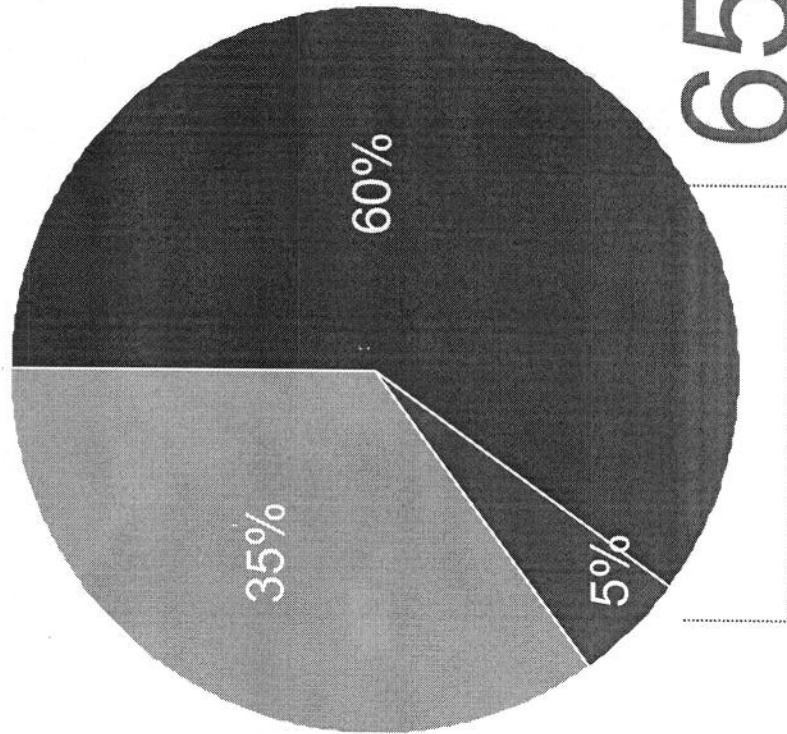
Traditional retailers are becoming **major players** in the Wireless market

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Smartphones Bring New Customers

# 65% Are New Smartphone Customers

Wireless Device Owned Prior to Current Smartphone



- I had a cell phone that was not a smartphone
- My current smartphone is my first wireless device
- I previously had a smartphone

**65% new smartphone owners**