

# Smartphone Purchase Drives Carrier Switching

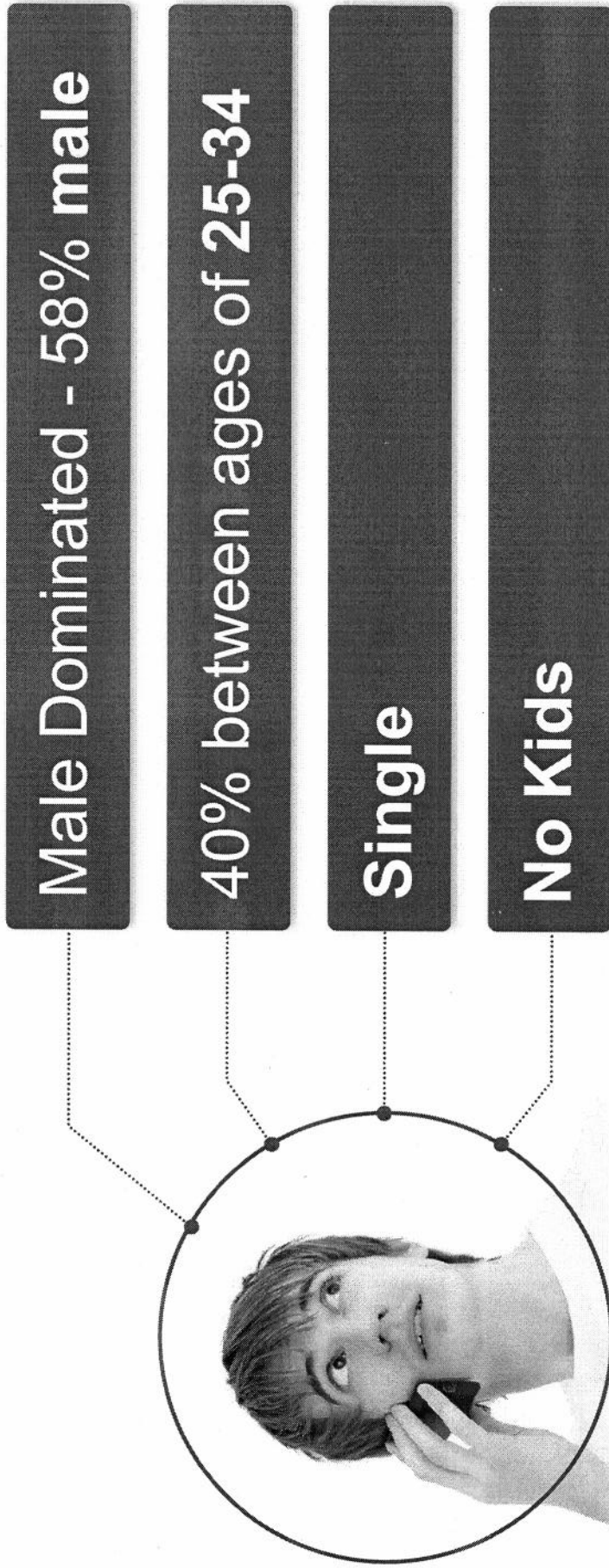


Been with current service provider 2+ years

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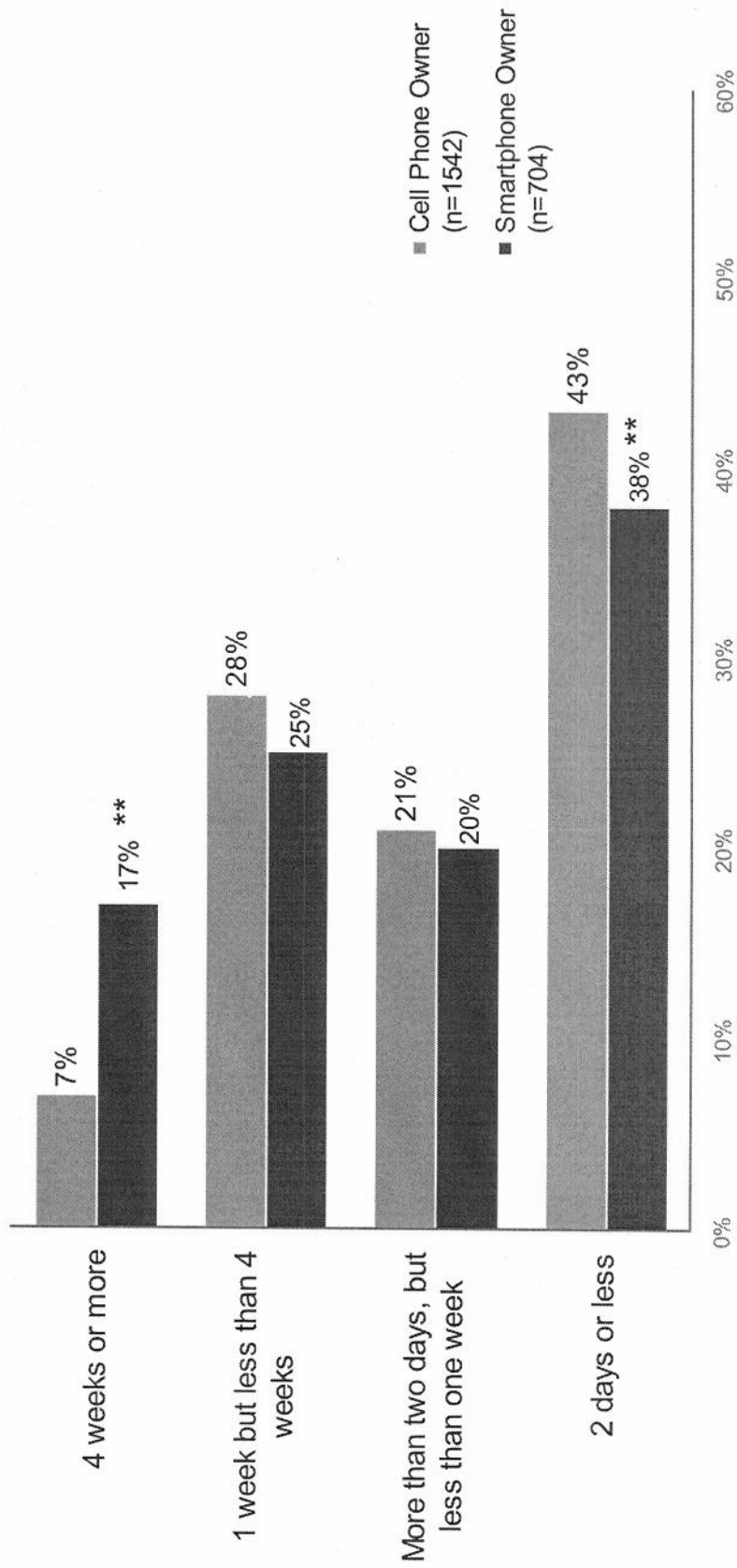
Q: How long have you been with your current wireless service provider.  
Source: Compete Gen Pop Wireless Survey, August 2009.

# Smartphone Owners Are True to “Type”



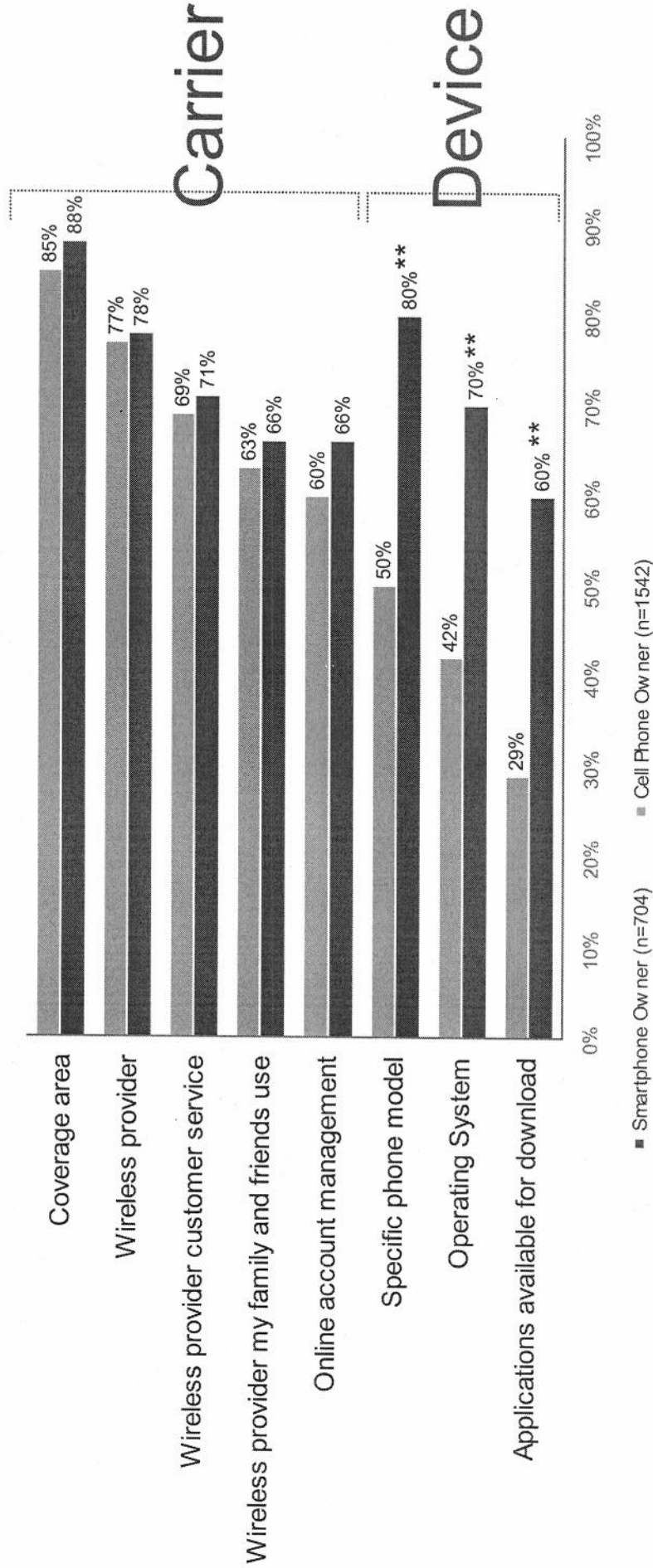
# Smartphone Owners Do More Research

Time Spent Researching Phone Purchase  
(Smartphone Owner vs. Cell Phone Owner)



# Smartphone Buyers Value Device Attributes

Importance of Attributes  
(Smartphone vs Cell phone)



Q - On a scale of 1 to 5, how important were each of the following attributes when making your most recent cell phone purchase? (Top 2 Box)  
(Total Respondents=2961)  
Source: Google/Compete Wireless Shopper 2.0 Study, January 2010.

# Smartphone Buyers Seek Features

## *Why I Bought a Smartphone*

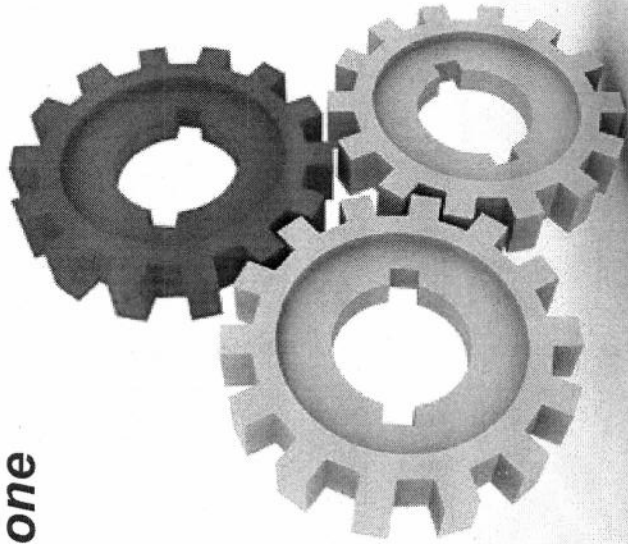
**45%** I wanted a phone  
with more features

**22%** I saw a new phone  
I had to have

## *Why I Didn't Buy a Smartphone*

**53%** Smartphone plans are  
too expensive

**28%** I don't need the features  
on a smartphone



Q - Why did you decide to make this cell phone purchase? (Total Respondents=2961) Source: Google/Compete Wireless Shopper 2.0 Study, January 2010.

SC4: Why haven't you purchased a smartphone? Source: Smartphone Intelligence Study, Q32009. (n=1959)

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Smartphones  
Bring New  
Customers



Smartphone buyers are **new to market**  
and open to **switching**.

**Device features** attract smartphone  
buyers.

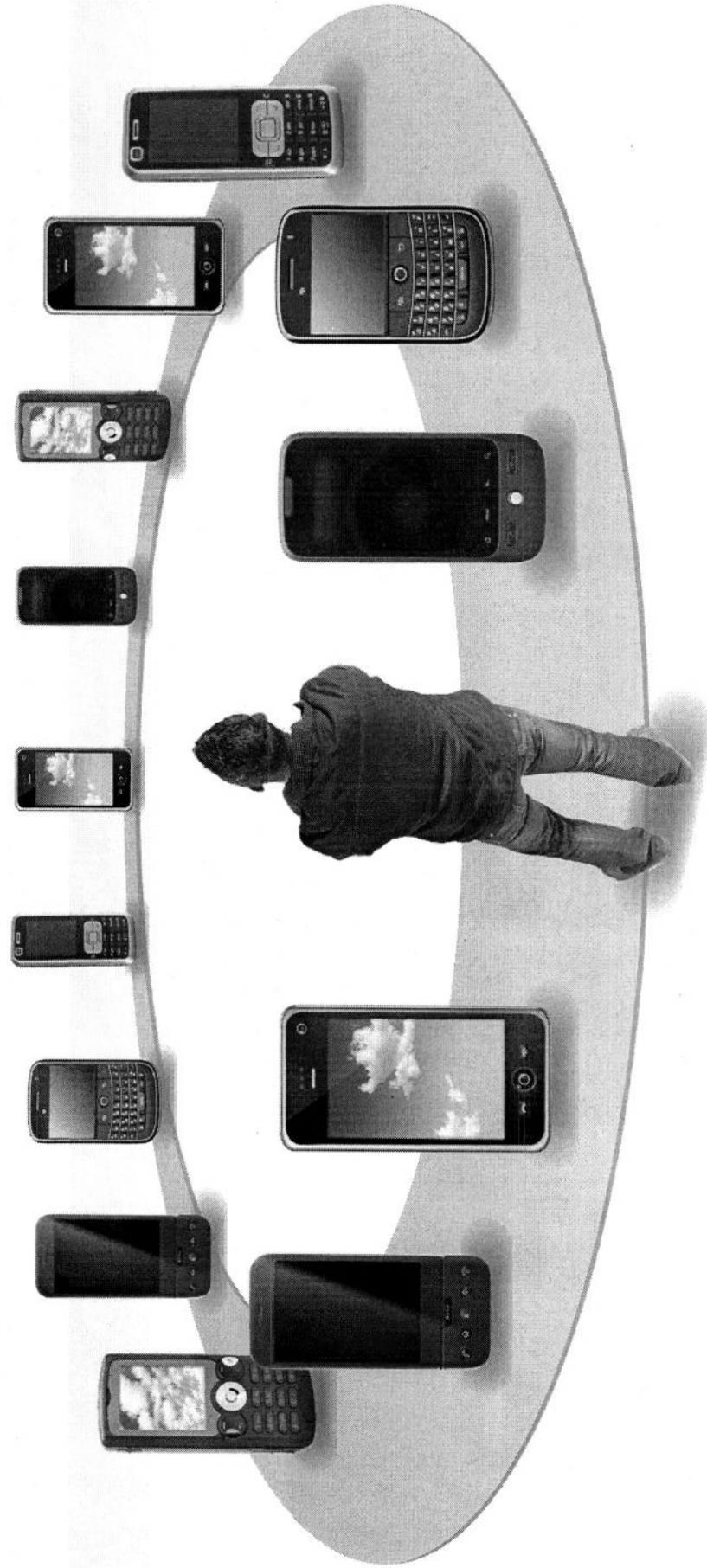
Increased complexity of smartphone  
device leads to **increased research**  
process.

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**Search is a Road Well Traveled by  
Wireless Shoppers**

# Wireless Shoppers Are Heavy Searchers

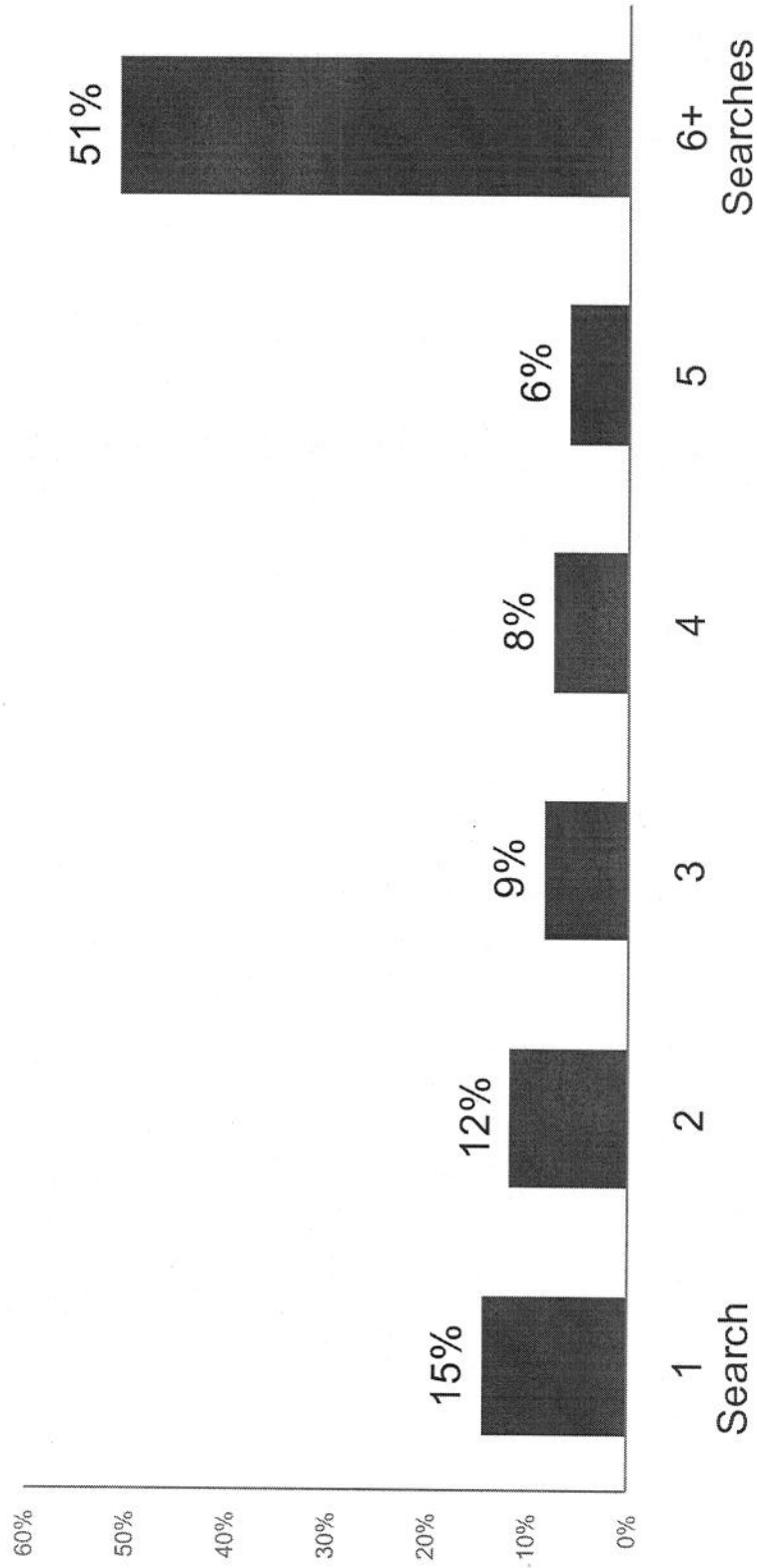
Wireless buyers do an average of **13** searches during their shopping process





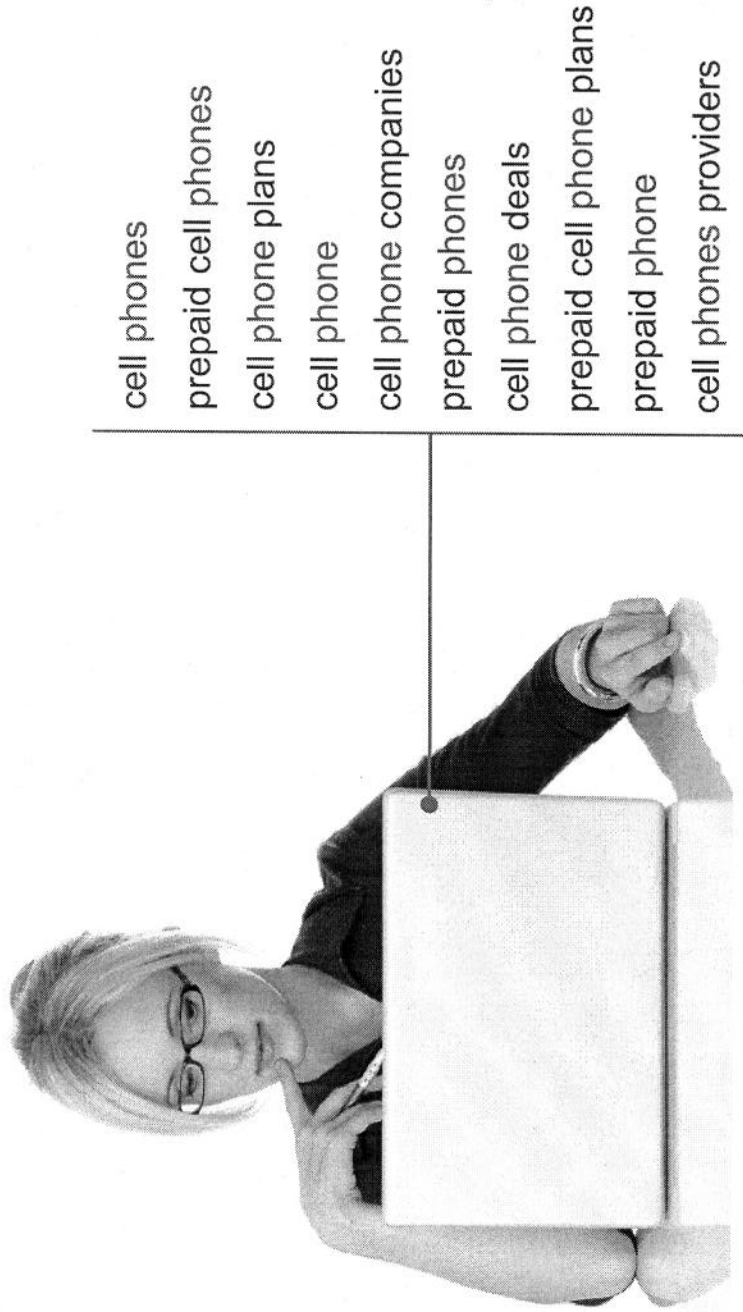
# Majority Are Heavy Searchers

Number of Searches During Shopping Process



# 49% of Buyers Searched on Non-Brand Terms

Top 10 Non-Branded Terms that led buyers to shopping cart

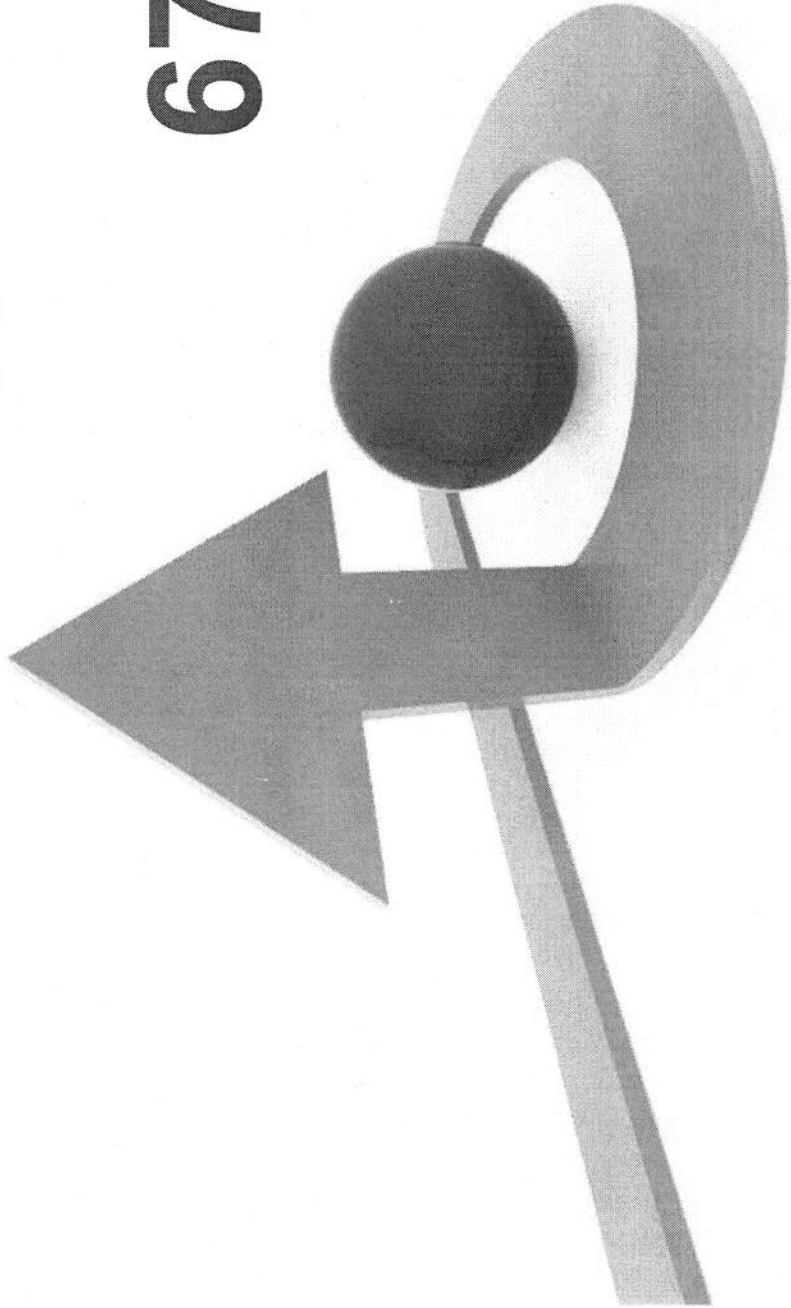


# Non-Brand Terms Convert to Sales

Non-Branded  
terms drove

**30%** of search driven conversions  
to Tier 1 carriers

**67%** of search driven  
visits to store  
locator pages



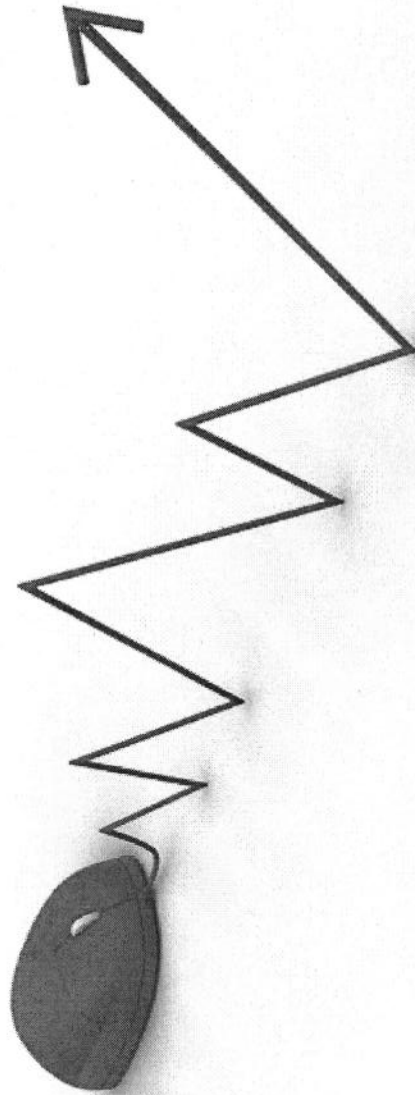
# Wireless Buyers Do

**13**

Searches...but

**3**

Clicks before  
purchase




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## Conclusions & Recommendations

# Key Findings

1  
It's a  
Competitive  
Marketplace



2  
Smartphones  
Bring New  
Customers



3  
Search is a  
Road Well  
Traveled by  
Wireless  
Shoppers



# Recommendations



Have a **Strong voice** in the marketplace and promote phone features.

Increase **Online marketing** to accommodate today's wireless shopping habits.

Explore co-op deals to **capture** growing influence of traditional retailers.

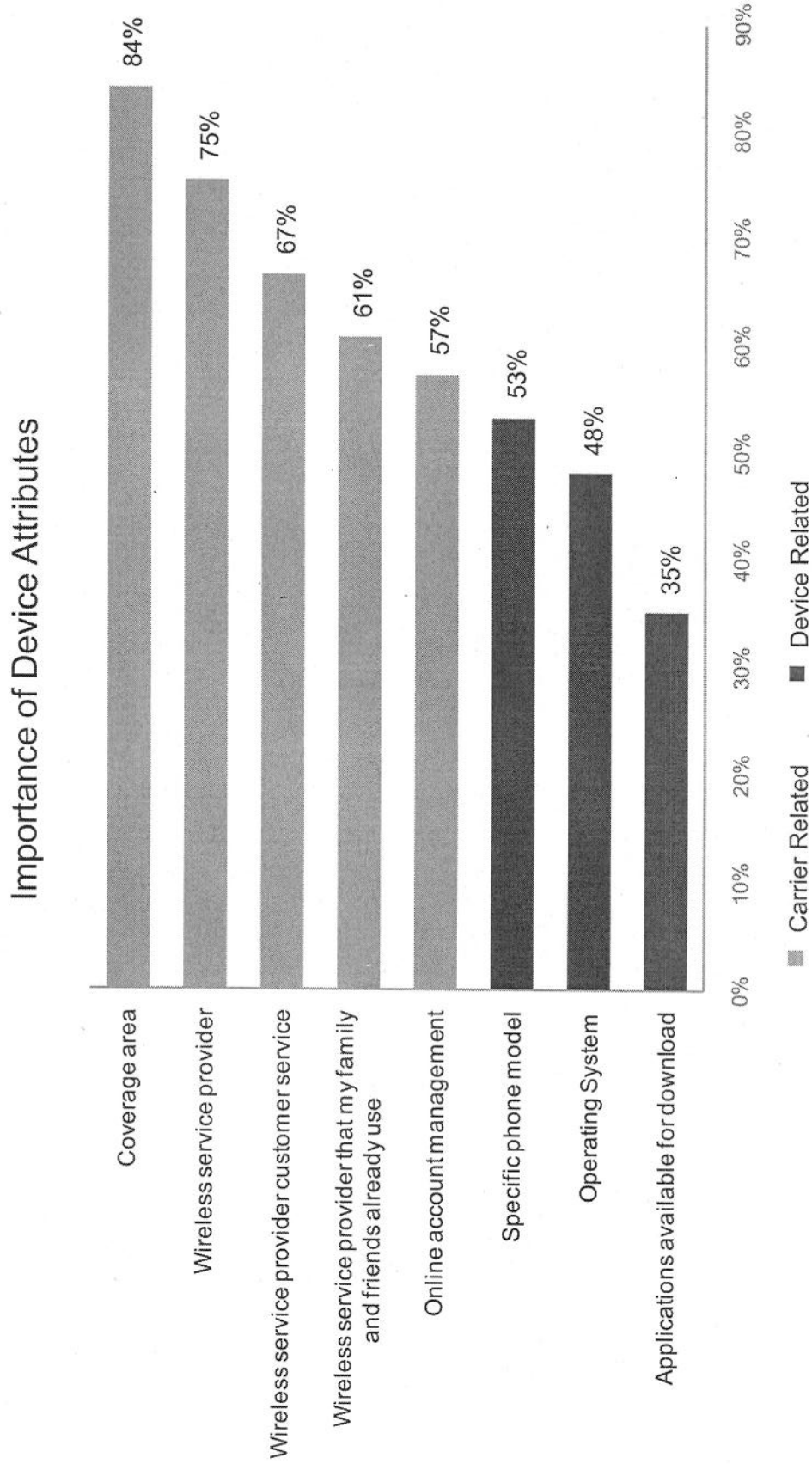
**Expand** keyword coverage to capture all potential customers.

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Appendix

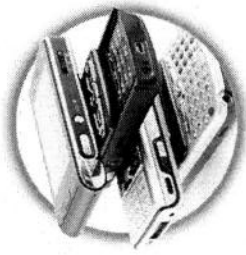


# Overall, Carrier Attributes Still Important



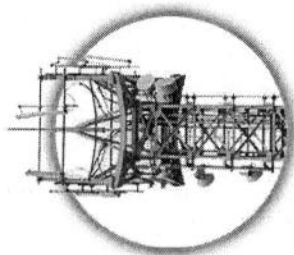
# Phone Priorities Divided by Gender

**Men**  
Device Focused



Device Features  
New Phone Models  
Applications Available  
More Likely to invest more money on device

**Women**  
Carrier Focused



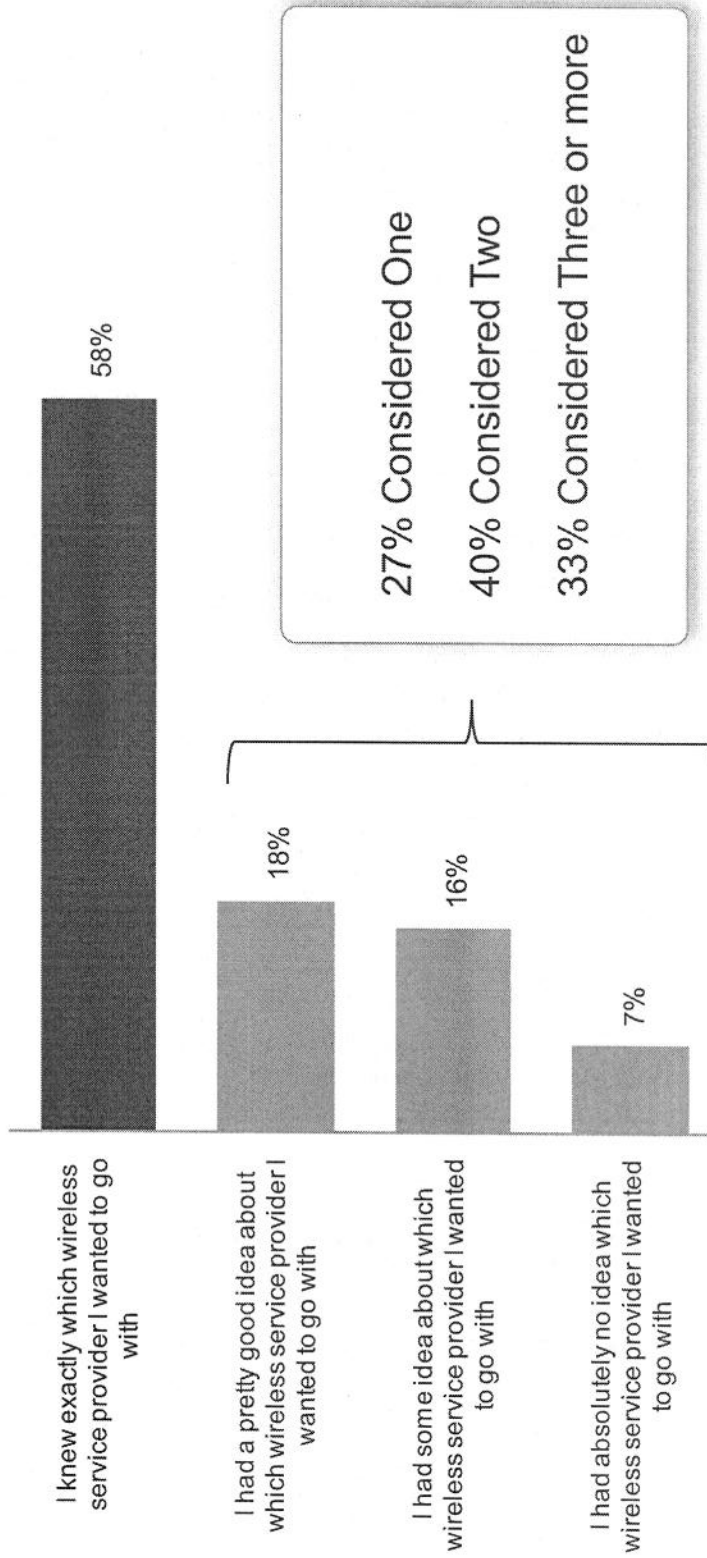
Customer Service  
Coverage Area  
More likely to know exactly which service provider they were going with  
More likely to have no idea about brand of cell phone

Q - On a scale of 1 to 5, how important were each of the following attributes when making your most recent cell phone purchase? Wireless service provider  
Q - When you first considered your most recent cell phone purchase, which statement best describes your mindset about the wireless service provider?  
Q - which statement best describes your mindset about the brand of cell phone?  
Source: Google/Compete Wireless Shopper 2.0 Study, January 2010.

# 42% Unsure About Provider

- 73% of unsure shoppers considered more than one service provider

Mindset about Wireless Service Provider Prior to Purchase



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)

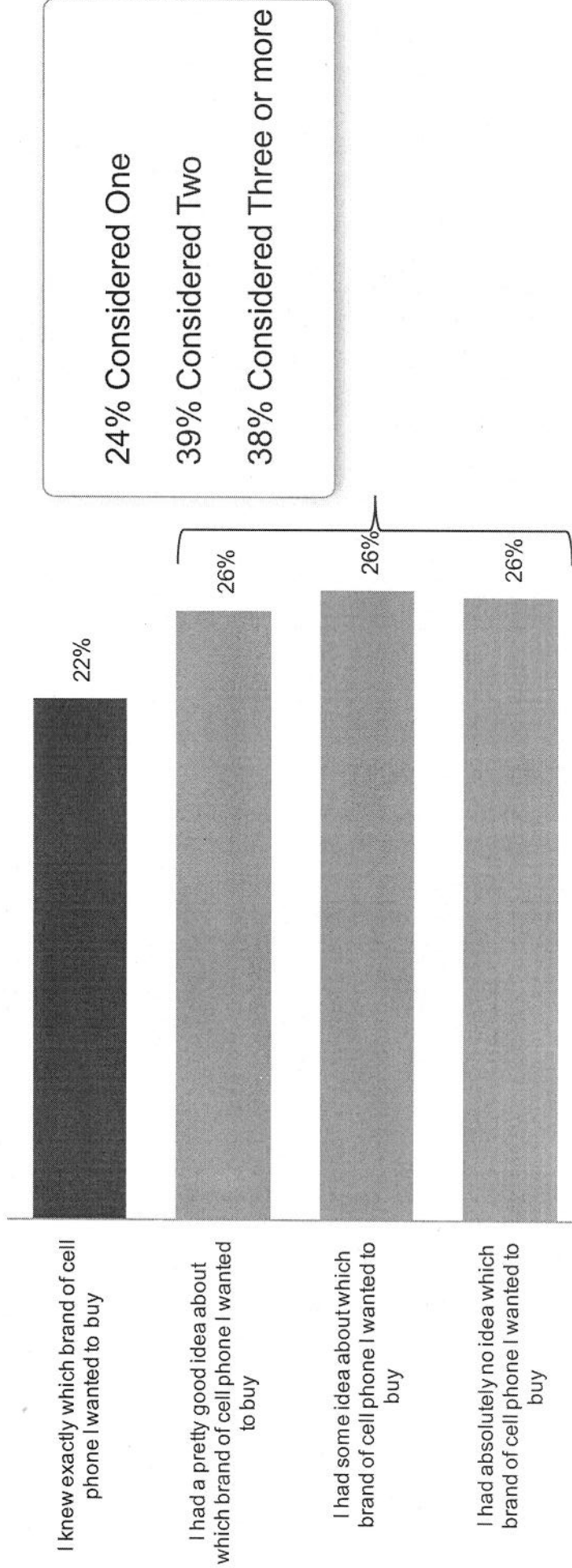
Q - How many wireless service providers did you consider when shopping for your recent cell phone purchase? (n=1238, Unsure of Provider)

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

# 78% Unsure About Manufacturer

- 77% of unsure shoppers considered more than one manufacturer

Mindset about Brand of Cell Phone Prior to Purchase



Q - which statement best describes your mindset about the brand of cell phone? (Total Respondents=2961)  
Q - How many phone models did you consider when shopping for your recent cell phone purchase? (Total Respondents=2961)  
Source: Google/Compete Wireless Shopper 2.0 Study, January 2010.

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