

To: Market Research User

The following document describes the seven reports InfoTek Research Group, Inc. is offering this year from our 2009 Wireless Retail Channel Survey.

Besides the title, description, cost and license, we provide a table of contents and a table of figures that can be used in the on-line description.

We offer one comprehensive report of findings and six smaller report modules taken from sections of the entire study.

Each of the smaller report comes with an executive summary of all the other sections. The names of each report and the price we are selling them at are listed below.

Report Title	Pages	Publication Date	Single User License Cost	Global Site License
2009 United States Wireless Retail Channel Study (FULL COMPREHESIVE REPORT)	151	May 18, 2009	\$3,995 USD	\$8,995 USD
2009 United States Wireless Sales Associates Profile and Behavior	47	May 18, 2009	\$795 USD	\$1,195 USD
2009 United States Accessory Demand and Sell-Through	48	May 18, 2009	\$1,295 USD	\$2,190 USD
2009 United States Wireless Application and Service Demand and Sell-Through	49	May 18, 2009	\$895 USD	\$1,990 USD
2009 United States Indirect Wireless Agent Satisfaction with Wireless Carriers	52	May 18, 2009	\$1,495 USD	\$2,295 USD
2009 United States Handset Capabilities Demand and Sell-Through	42	May 18, 2009	\$895 USD	\$1,790 USD
2009 United States Wireless Channel Handset Recommendation Factors	31	May 18, 2009	\$495 USD	\$990 USD

If you have any questions, please contact us direction at 1.509.248.8219 and ask for one of the wireless research analysts.

Thanks for your assistance in marketing are 2009 United States Wireless Channel Study.

Tregg Farmer
 President
 InfoTek Research Group, Inc.

2009 Wireless Retail Channel Study (full report)

151 Pages

Single User License \$3,995 USD

For those companies selling through the Wireless channels in the United States, having the most current information on this channel can make developing strategies and product planning much easier. To aid these companies, InfoTek Research continues its comprehensive market research initiative to monitor and report the important channel changes in retail channel behavior. Surprisingly, in 2009, information on the channel is still in very limited supply. By completing the Wireless Retail Study we hope to bring decision-makers up-to-date on the mobile retail channel and what has changed that should be taken into account when developing future strategies.

This research measures and quantifies what sales associates are “pushing” and what customers are asking for (the pull) at the point of sale and compares associates behavior across store types (e.g., carrier stores, independent agents, and national consumer electronic stores), compensation structures and personal characteristics.

Examples of some of the questions addressed in this study include:

- *What accessories and wireless applications are customers asking for most and which ones are being “pushed” by sales associates?*
- *Which features of a mobile device are the most important when it comes to selling handsets?*
- *Which features are customers asking about at the point-of-sale?*
- *How satisfied are independent dealers with the nationwide carriers and which nationwide carriers are improving and losing ground in the eyes of the sales associates?*
- *Are associates becoming more or less educated with today’s advancements in wireless technology?*
- *What technology areas do associates still need more education in order to be more effective at selling advanced services?*

How important are these sales associates becoming? In 2009, each associate we surveyed worked with over 8,100 consumers a year, an increase of 25% since 2003 in customer interaction.

The major areas of this comprehensive report include:

- ***Wireless Sales Associates Profile and Behavior Study***
- ***Indirect Wireless Agent Satisfaction with Wireless Carriers***
- ***Accessory Demand and Sell-Through from Sales Associates***
- ***Wireless Application and Service Demand and Sell-Through from Sales Associates***
- ***Handset Capabilities Demand and Capability Impact on Sales Associates Recommendation***
- ***Major Handset Recommendation Factors***

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2009 Profile of Wireless Sales Associates Profile and Behavior Survey

47 Pages

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Knowing who is selling the wireless hardware, software and plans at the point-of-sale is extremely critical for all companies distributing products and services through the US wireless channel. How tech-savvy are associates in the U.S.? What items are they receiving commission for? How have channel changes in the last two years impacted their compensation? This report answers these questions and many more to give companies a comprehensive understanding of who is responsible for selling their products and services to the end customer.

InfoTek Research completed in-depth surveys with 223 wireless sales associates in both carrier stores and independent agents using stratified random sampling to represent the wireless retail channel in the United States. With this information, InfoTek offers readers a rare glimpse into the behavior of those sales associates standing behind the counter making recommendations to millions of wireless consumers each year regarding which wireless phones, accessories and services to purchase.

This report reviews the trends over a six year period (2003-2009) in the typical sales associate. It will be important to all members selling through the wireless channel to understand these changes and take them into account when developing short and long-term channel strategies.

Some of the information in this study includes:

Associate Profile:

- Have associates' put their arms around new technology?
- Are associates becoming more or less tech savvy?
- Which sales associates less or more likely to stay in the wireless business?
- Is the general education level of associates increasing or decreasing?

Associate Interaction:

- Which channel's associates are interacting more and less with potential wireless customers?
- How many customers are associates interacting with compared to previous years?

Associate Compensation:

- Have the services and items for which they receive commission changing over time?
- How much money do associates earn compared to previous years?
- Are associates more or less likely to earn commission compared to previous years?
- Do associates get free phones as part of their jobs?

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2009 Indirect Wireless Agent Satisfaction with Wireless Carriers Survey

52 Pages
Single User License \$1,495 USD

This report provides reviews how the major carriers are performing with indirect agents. Our 2009 study found that one carrier in particular has significantly increased their ability to satisfy the indirect channel while others have made it more difficult for this channel to market services.

In addition, this report gives the reader an understanding of which factors have become more or less important to indirect channel wireless sales personnel. We hope these findings can help all companies selling through the indirect channel understand those elements needed to gain support from the sales associates.

As a comparative measurement, InfoTek has created an in-depth **overall performance index** which takes into account both the overall importance of factors in recommending one carrier over another and each carrier's ability to provide sales associates in each area. This study shows that some carriers have stepped-up to the plate even more since 2007 while others are continuing to fall short in support independent resellers.

Carriers Compared

- Verizon Wireless, Cingular Wireless, Sprint /Nextel, T-Mobile USA

Examples of Specific Information

- Which carriers have made selling their services easier or harder to sell over the last few years?
- What has been the impact of recent mergers on the carriers' ability to meet the needs of the indirect agent channel?
- Which characteristics of wireless carriers make their services relatively easier or more difficult for resellers to sell and have these changed in the last couple of years?
- How do the major U.S. carriers score on each factor that makes their services easy or difficult to resell?
- Which U.S. carrier overall is the easiest for resellers to sell?

Carrier Performance Measured on Key Factors

- Quality the carrier's network coverage
- Direct compensation
- Quality of the sales support*
- Quality of the technical support*
- Variety of the calling services
- Ease activating new wireless services
- Variety of devices
- Brand image of the carrier*
- Quality of training*
- Amount of training*
- Cost of the carrier's service plans
- Quality of the carrier's customer service
- Ability to target certain types of customers

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2009 Accessory Demand and Sell-Through from Sales Associates

48 Pages

Single User License \$1,295 USD

This report provides reviews the accessory demand and sell-through and how it has changed in the last few years. Which accessories have hit market saturation? Which accessories are still increasing in demand? Over the last three years the number of accessories offered for mobile handsets has increased dramatically and some of even decreased.

Accessories are no longer seen as a marketing tool to give away to customers in order to secure a sale. Wireless retail outlets are now looking to accessories to contribute significantly to their bottom line. Accessory manufacturers have picked up on this and have begun to offer countless new products.

This report reviews important changes in the demand for wireless accessories and the “push” marketing of accessories by sales associates.

The 2007 study includes “push” and “pull” marketing information on the following accessories:

- Bluetooth Wireless Headsets
- Wired Headsets
- Thumb QWERTY Keyboards
- Foldout full-size QWERTY Keyboards
- Digital camera accessories
- Connectors/cables for synching
- Car Chargers
- Phone Faceplates
- Extra Batteries
- Leather Cases
- Car Phone Holders
- Memory Cards
- Hands-free Car Kit
- Belt Holster
- Car Antenna
- Screen Protectors
- Stickers
- Housings
- Handstraps

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2009 Wireless Application and Service Demand and Sell-Through from Sales Associates

49 Pages
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The frontier of mass-market adoption of these new wireless handset applications and services is the point of sale. Our research has found that a significant amount of initial awareness for applications is created at the point-of-sale by sales associates.

The distribution point is where the rubber meets the road in that it represents the single point where carriers, developers, handset vendors and platform providers have the opportunity to personally interact with end-users. While there is not uncertainty around the importance of the retail channel, there is very little certainty about how well the retail channel is doing in terms of educating and selling consumers on the value of enhanced wireless services.

One of the major purposes of the *Wireless Retail Survey* is to collect measurable and trackable data on what retail associates are seeing and doing related to the adoption of specific value-added services.

Many of the findings in this report segment value-added services data by retail channel. The study breaks the respondent into three channel categories: carrier stores, national consumer electronics retailers and regional / local resellers.

InfoTek's 2009 survey includes demand information on the following applications and services.

- Wireless Internet access
- Wireless E-mail
- Wireless Instant messaging
- Short messaging or SMS
- Multi-media messaging
- Wireless over-the-air games
- Wireless over-the-air ring tones
- Wireless over-the-air music
- Wireless Wallet service
- Voice activated dialing
- Voice portal services
- Location-based services
- Wireless digital imaging
- Wireless modem access using phone

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2009 Handset Capabilities Demand and Impact on Sales Associate Recommendations

42 Pages
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Report Summary

Handset capabilities have increased dramatically in the last two years, but which new features are being “pushed” by wireless associates and being asked for by end consumers? Wireless handset manufacturers and those companies assisting in the development of new technology need this information to help short-term and long-term planning.

One of the major uncertainties facing the U.S. wireless industry is the optimum mix of features and capabilities to include in wireless handsets. Given the size, battery life, processing power and the new interface capabilities of handsets, there is often a zero sum game for manufacturers in deciding which capabilities to include. Carriers also have a loud voice in determining what manufacturers’ ship, often dictating form factors and features sets to be included in new handsets.

The purpose of this report of the *Wireless Retail Survey* is to collect data from retail sales associates on their knowledge and behavior when it comes to wireless handset capabilities. This report also explores consumer demand for specific handset capabilities through the eyes of the retail associate.

Those capabilities covered in this report include:

- High-speed wireless data
- Over-the-Air downloading of Applications
- Streaming Audio
- Streaming Video
- Ability to combine functions of other devices such as PDAs, MP3 Players and digital cameras
- GPS capability
- International Roaming
- Built-in Digital Still Camera
- Built-in Digital Video Camera
- Bluetooth
- Infrared Port
- Push-2-Talk
- Speaker Phone
- Polyphonic Ring tones
- PDA Capabilities
- Basic E-Mail like Yahoo or Hotmail
- POP3 or Corporate E-Mail capabilities
- MP3 player
- SIM Cards
- QWERTY keyboard
- Wi-Fi

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2009 Handset Recommendation Factors from Sales Associates

31 Pages
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The purpose of this study is to determine what makes sales associates recommend one handset over another. Time and time again InfoTek has found that it is not necessary the "best" handset that wins the favor of sales associates. In fact, most of the time there is one or two features that are important to the sales associate and that translates their recommendation.

As the capabilities and usage of wireless handsets evolve, so does the relative importance of factors that make one handset more attractive than another. The wireless retail associates know better than anybody, including the customer himself, what truly drives consumers to choose handsets.

InfoTek's survey asked retail associates how important they are in customers choosing one handset over another.

Those aspects of a handset included in this assessment include:

- Price
- Appearance of the phone
- Battery life
- Brand Name
- User Interface
- Size of the phone
- High Resolution, Color Screen
- Reliability
- Reception
- Phone color
- Weight
- Form factor (e.g. flip phone, bar phone)
- Keypad type (e.g. T-9, QWERTY)
- Screen Size
- Color of phone
- Sales contests or promotion for prizes for selling a handset
- In-store sales spiffs for selling a brand of handset
- Knowledge/training provided by handsets manufacturer
- Collection of accessories that are available for the handset
- Advertising, such as POP displays, mock-ups and posters

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2009 United States Wireless Retail Study Ordering Form

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Company Name	
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Job Title	
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Card Type (VISA, MasterCard or American Express accepted)	
Name on Card	
Credit Card No.	
Expiration Date	

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