

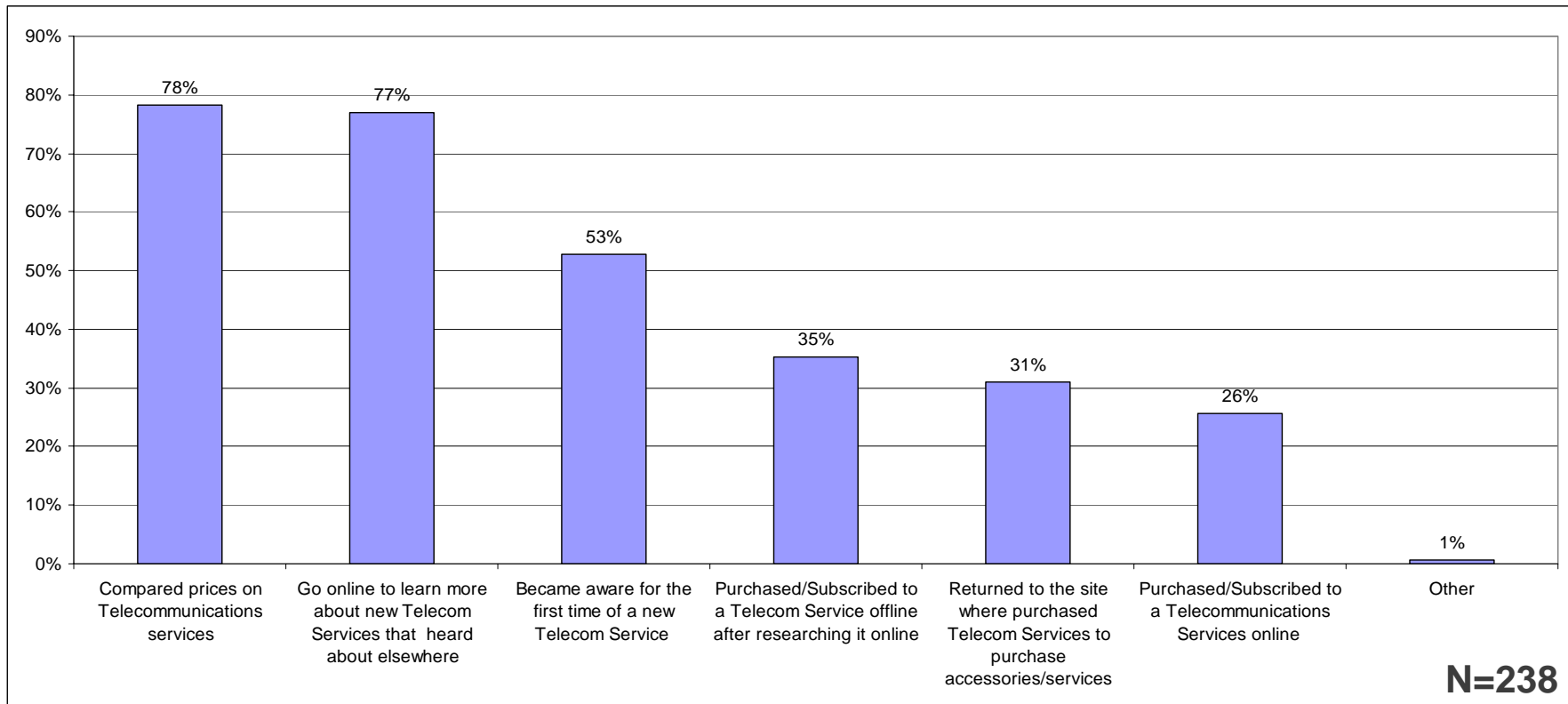
We surveyed a total of 300 consumers that use the web to research and/or purchase Telecommunications Services

- A custom survey instrument (i.e. questionnaire) was developed to measure respondents' use of the web, and search engines in particular, for researching and purchasing Telecommunications Services
- The survey was conducted online, through a web-based interviewing process, in March 2005
- Our sample is evenly distributed across all age groups and genders
- Respondents were recruited through a variety of methods: web advertising, permission-based databases, public relations, telephone recruitment, partner-recruited panels, and alliances with heavily trafficked portals
- The survey was designed and administered by Global Market Insite (GMI), a global sampling and data collection company, and Media-Screen, an independent strategic market research firm

Executive Summary

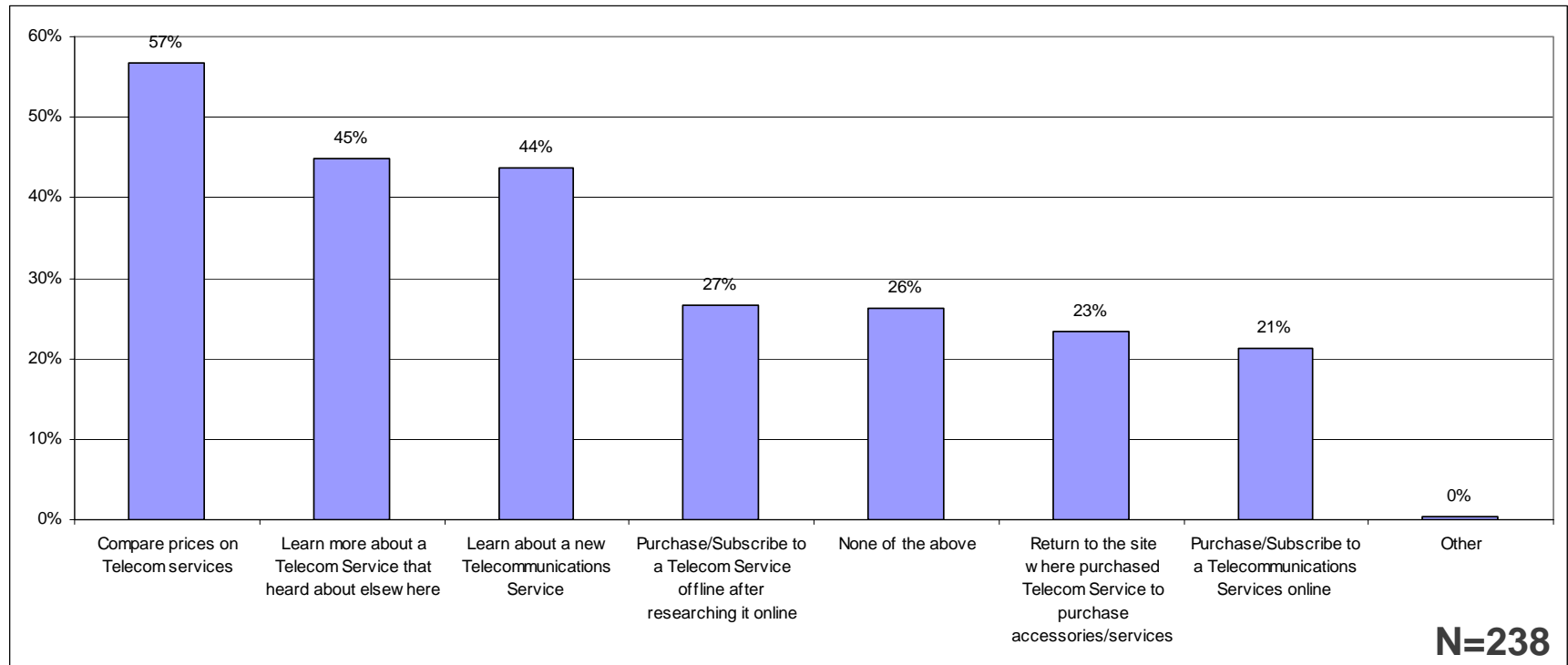
- Three-quarters (78%) of Google users **compare prices** for Telecom Services online and 26% have **purchased** Telecom Services online
- Search engine usage:
 - Nearly two-thirds (64%) of Google users use a search engine first when **researching** Telecom Services, while less than 2% go to a portal first
 - Two thirds (65%) of Google Users feel a **search engine** is **important** to their making a telecom service purchase decision
 - The vast majority (90%) of Google users say they would **likely** use a search engine **after seeing an advertisement** for a Telecom Service
- Over 70% of all respondents select Google (over other search engines) to **research** and **purchase** Telecom Services
- Almost three-fourths of Google users (74%) **have heard** of **VoIP** and the vast majority of Google users (92%) say they would be comfortable **purchasing VoIP** online
- Nearly three-quarters (74%) of Google users use a search engine to **research cell phone plans** and **internet access services**

Three-quarters (78%) of Google Users compare prices for Telecom Services online and one-quarter (26%) purchased Telecom Services online



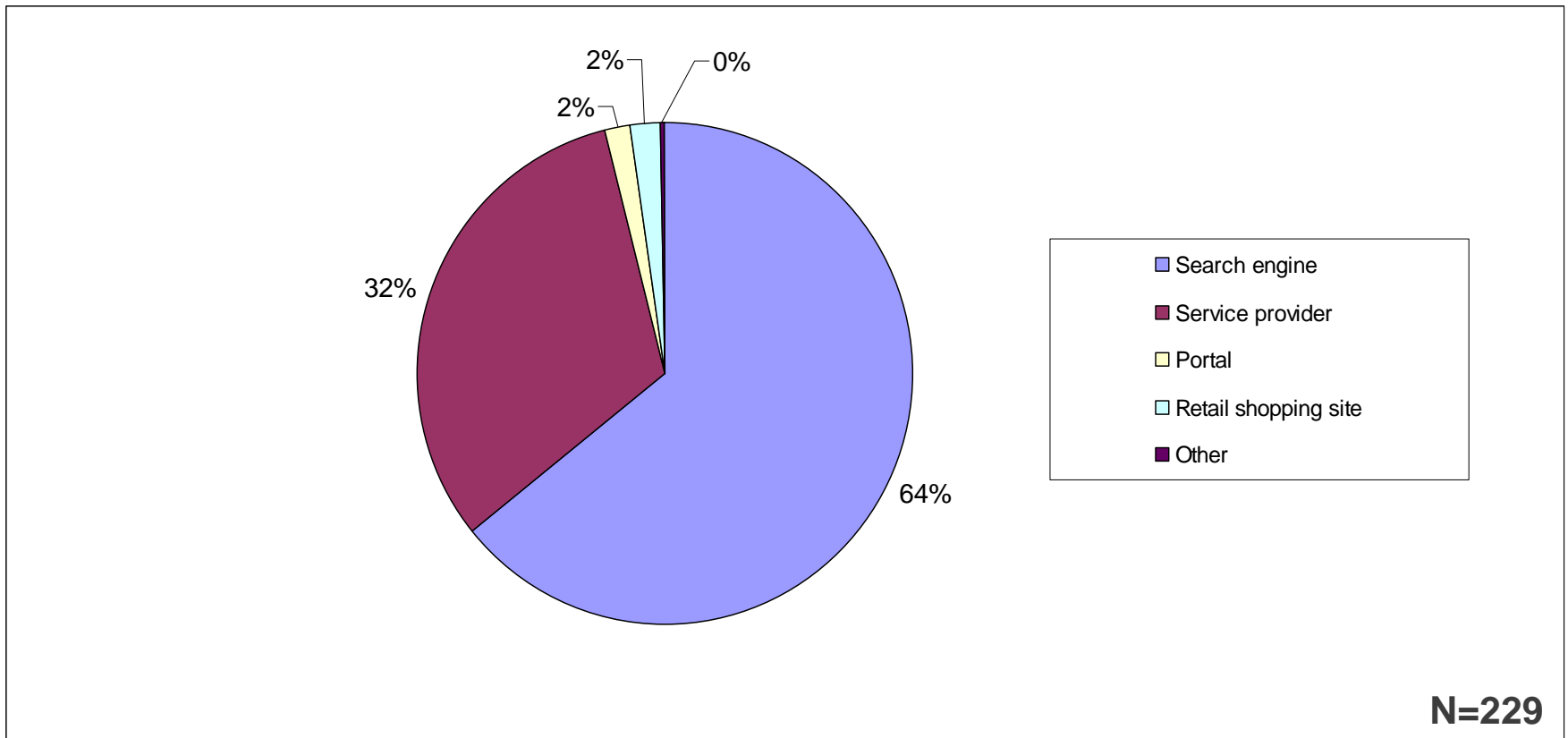
Have you ever done any of the following online? Please select all that apply.

Over half (57%) of Google Users expect to compare prices for Telecom Services in the next six months



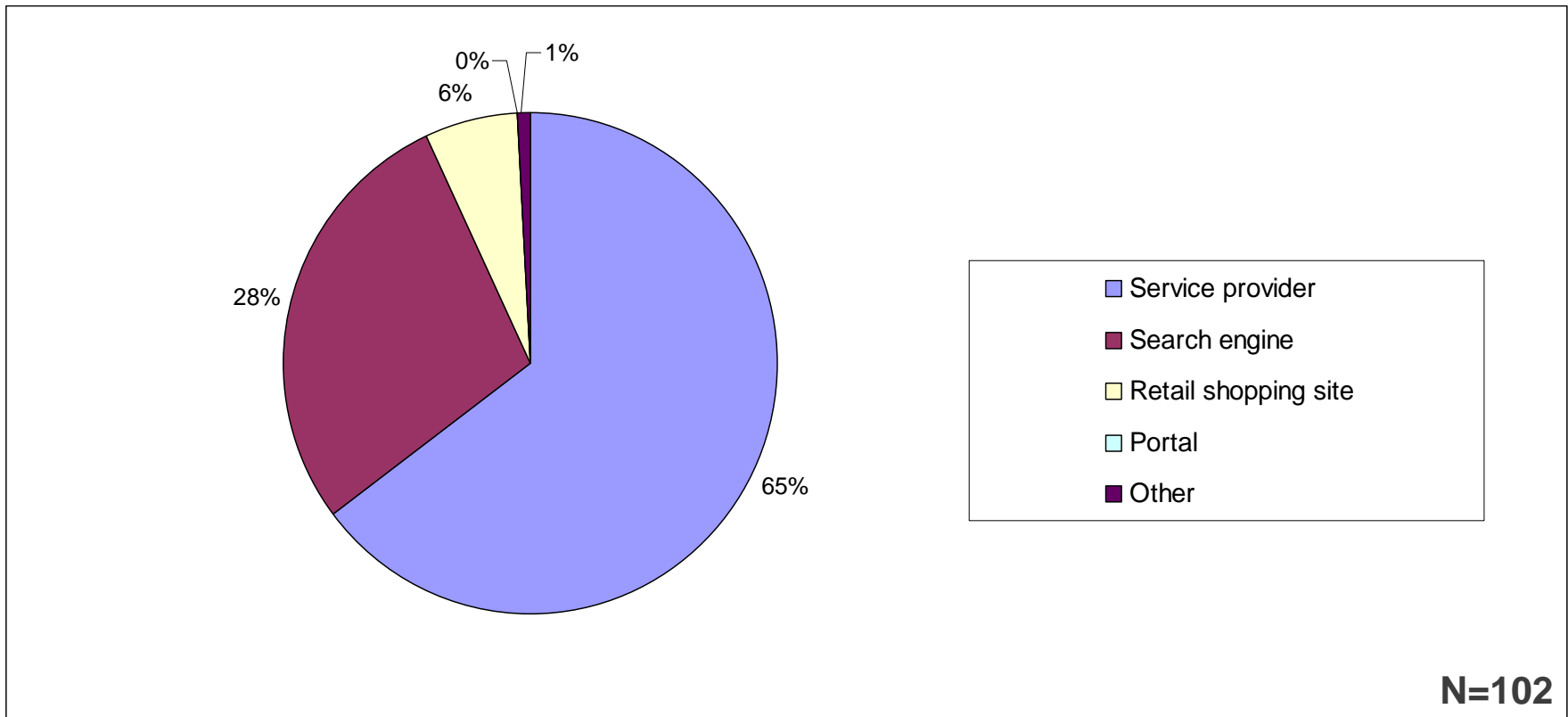
Which of the following activities do you expect to do online in the next six months?
Please select all that apply.

Nearly two-thirds (64%) of the Google Users use a search engine first when researching Telecom Services while less than 2% go to a portal first



When you go online to research a telecommunications service (phone services, Internet access services, wireless plans), where do you typically go first?

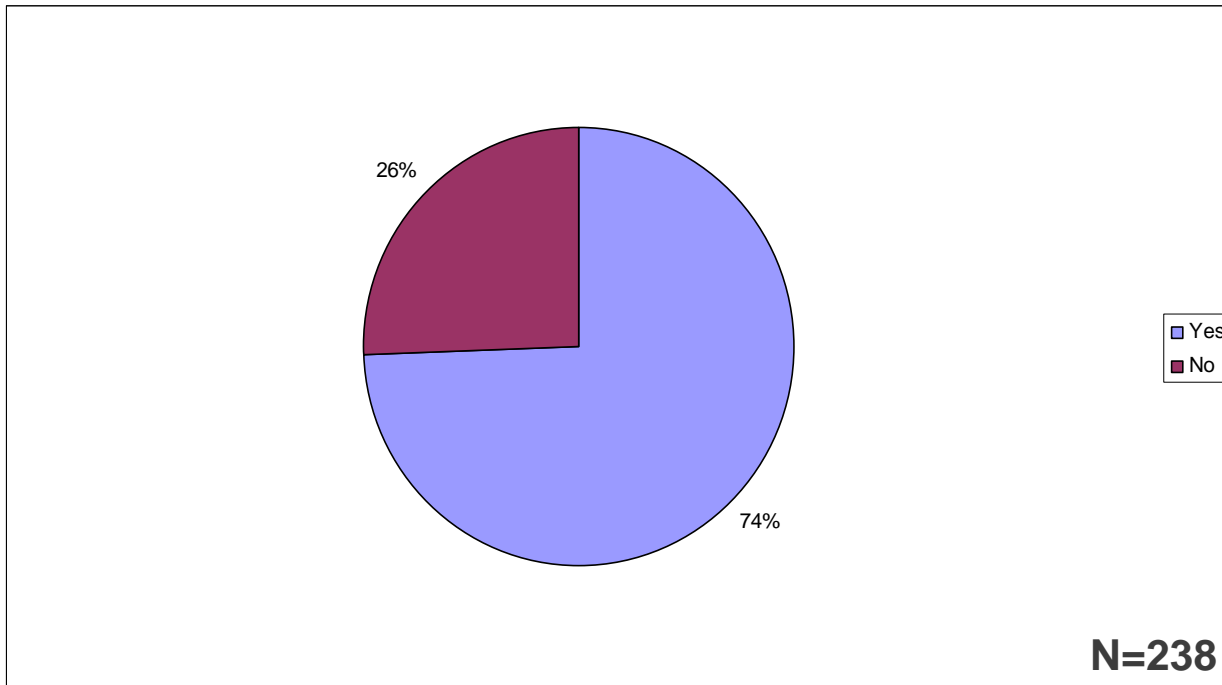
Most Google Users (65%) go to a service provider, but one-quarter (28%) go to a search engine first when purchasing a Telecom Service



When you go online to purchase a telecommunications service (phone services, Internet access services, wireless plans), where do you typically go first?

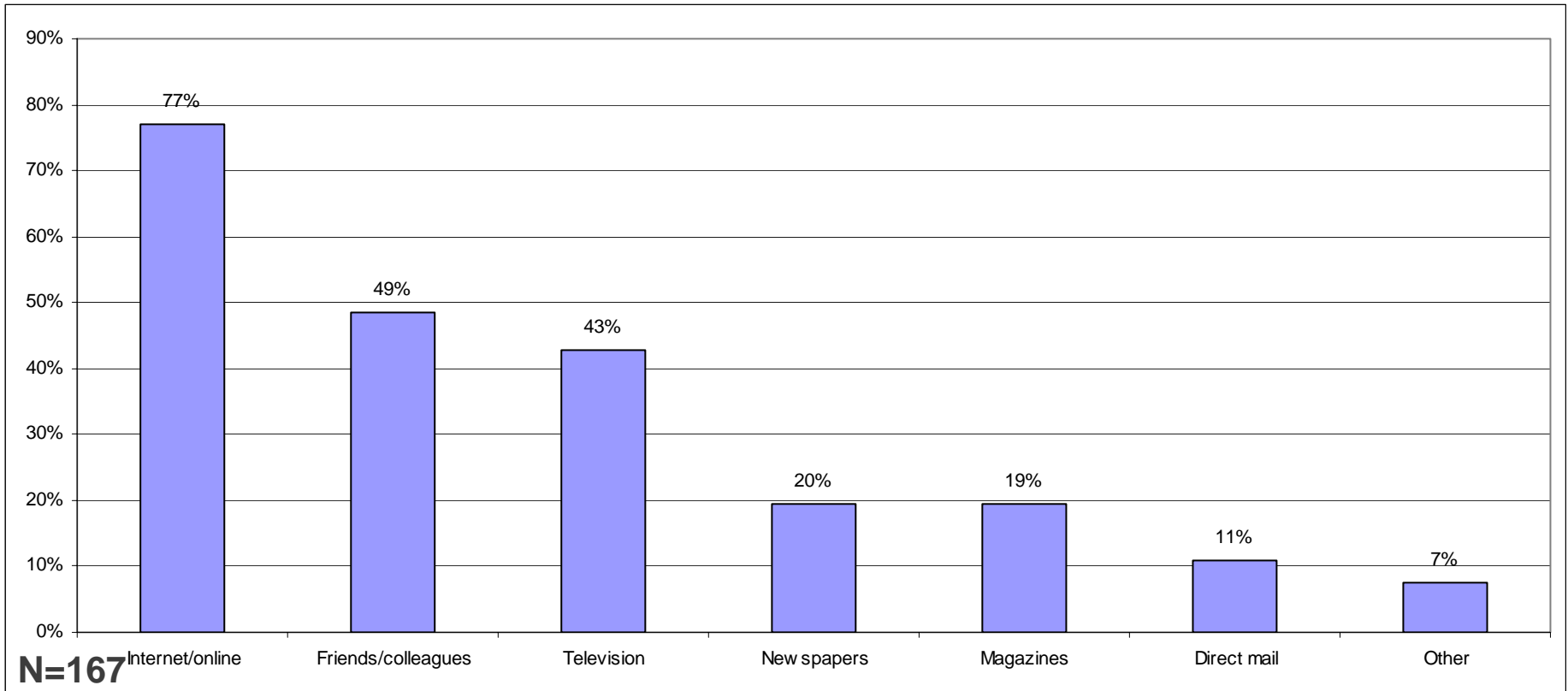
Source: 2005 Telecommunications Survey, conducted by GMI and Media-Screen (Mar. 2005)

Almost three-fourths (74%) of Google Users have heard of VoIP



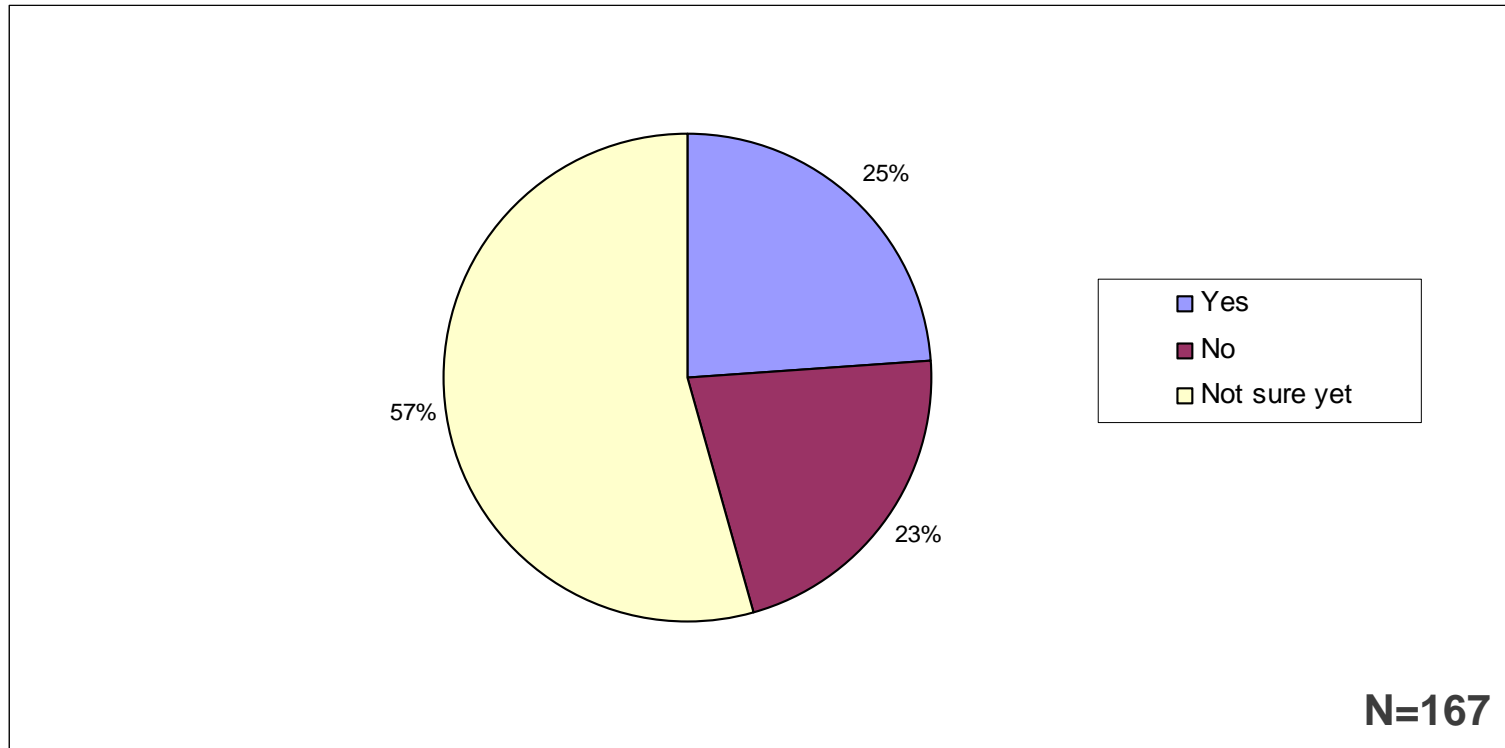
Have you heard of a new technology called VoIP (Voice over Internet) that allows users to make phone calls over their broadband Internet connection?

Three-quarters of Google Users (77%) have heard about VoIP online



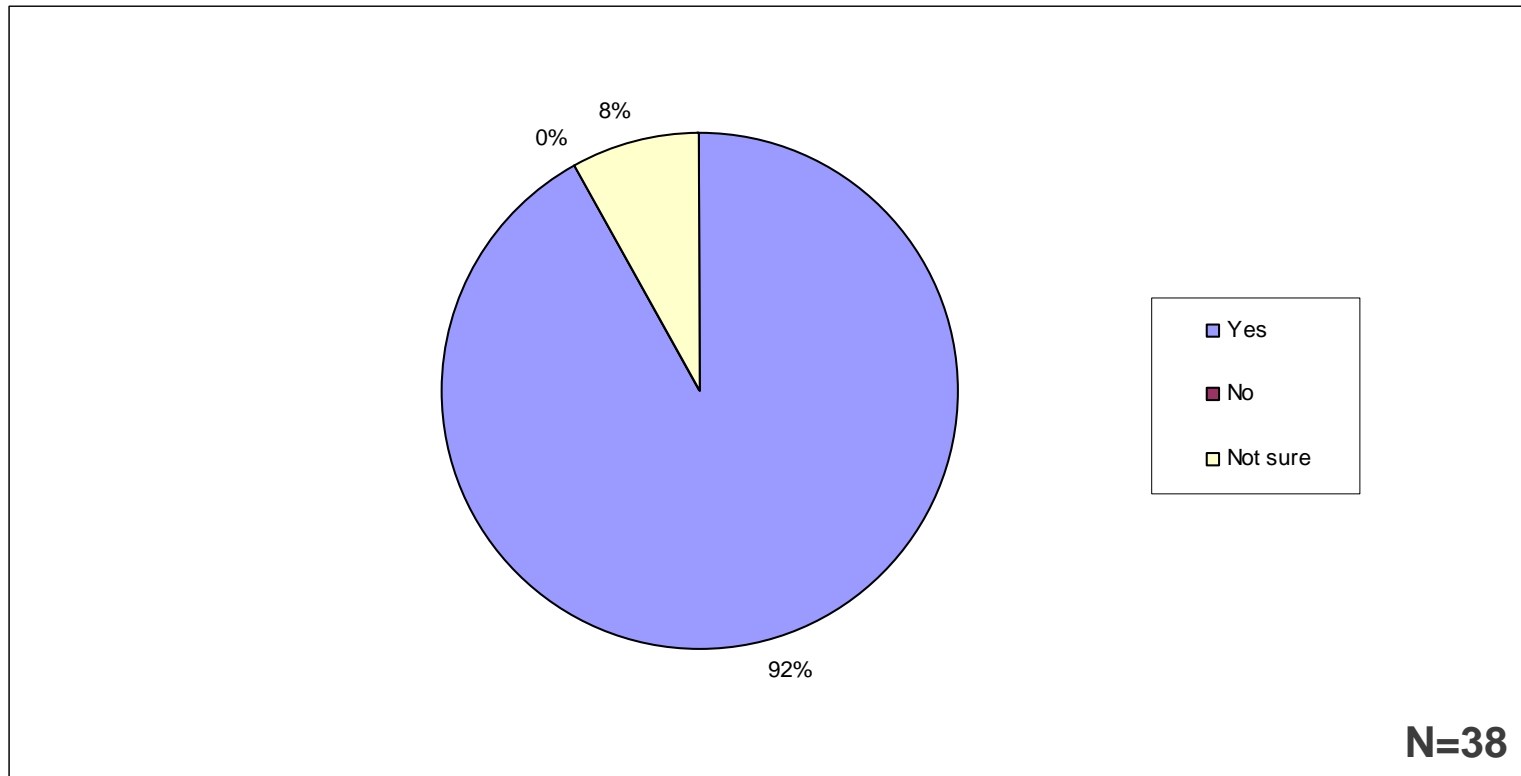
Where have you heard about VoIP (Voice over Internet)? Select all that apply.

One-quarter (25%) of Google Users said they would purchase VoIP for their home, but over half (57%) are not yet sure



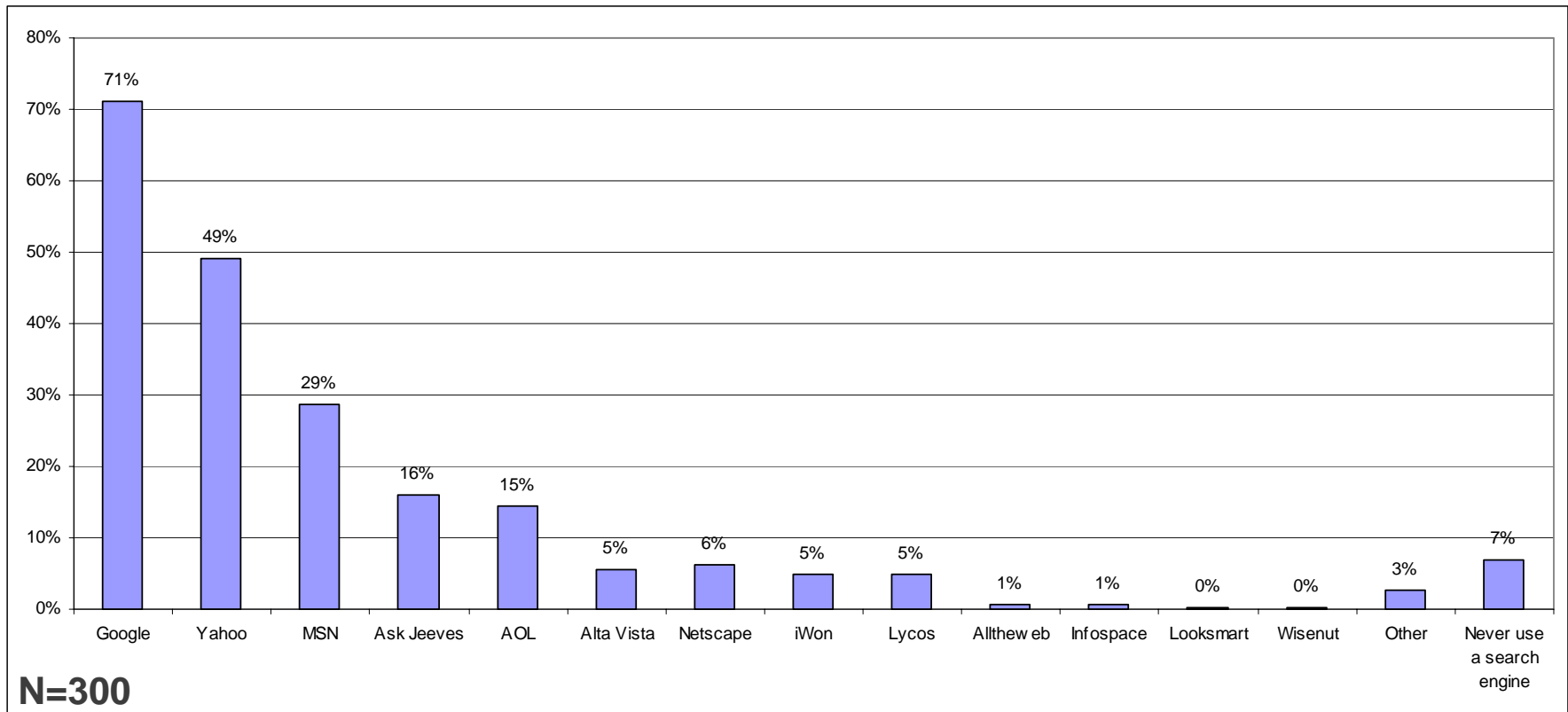
Would you consider purchasing VoIP for your home?

The vast majority (92%) of Google Users say they would be comfortable purchasing VoIP online



Assuming you were prepared to purchase VoIP, would you consider making that purchase online?

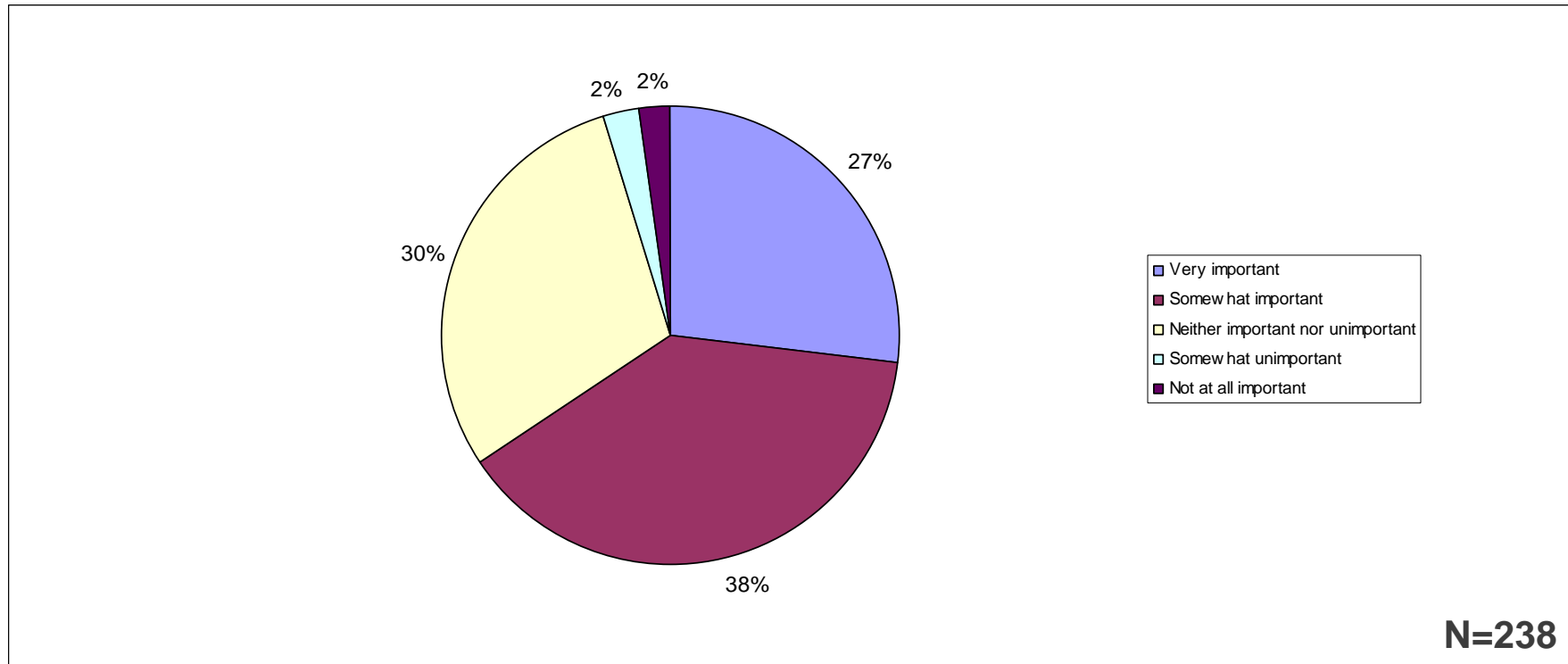
Over 70% of all respondents select Google (over other search engines) to research and/or purchase Telecom Services



Which, if any, of the following search engines do you use when researching or purchasing telecommunications services (phone service, Internet access service, wireless service plans)?

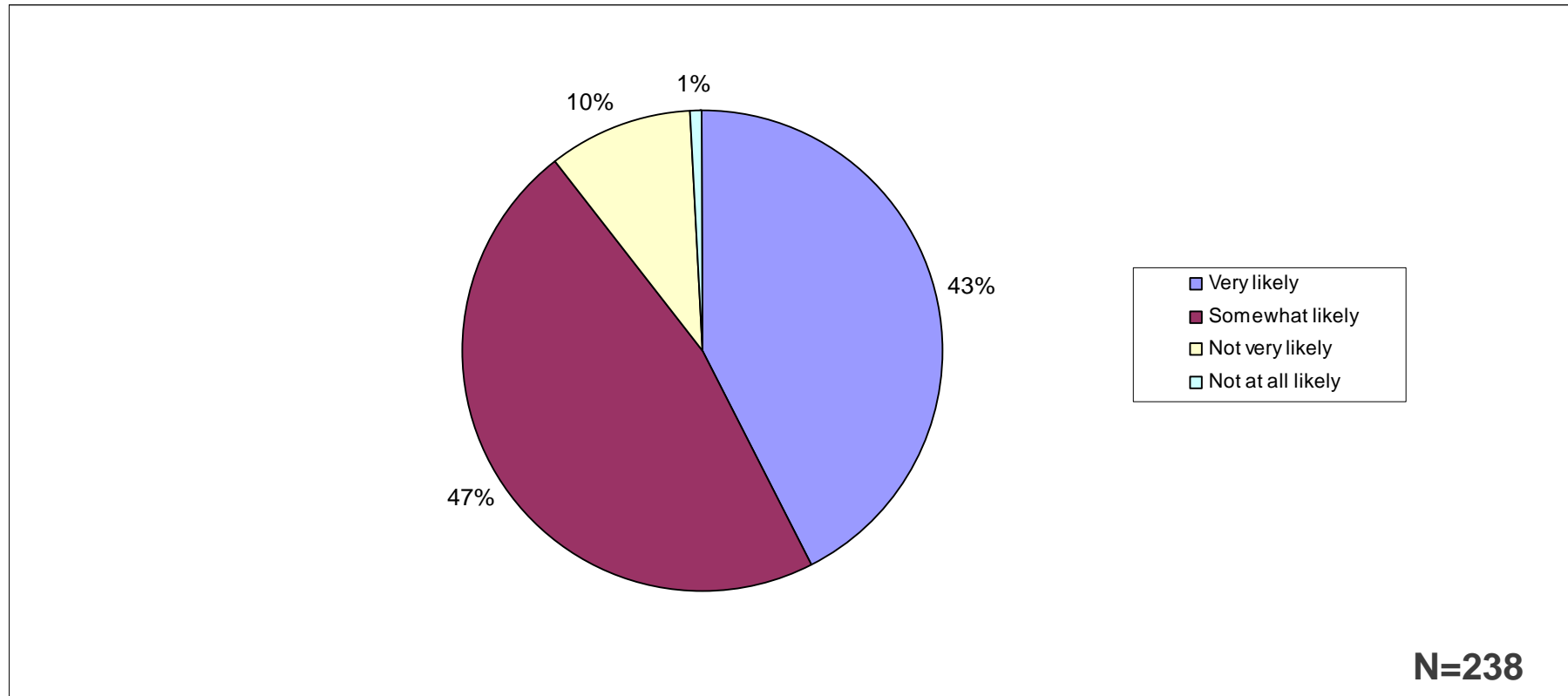
Source: 2005 Telecommunications Survey, conducted by GMI and Media-Screen (Mar. 2005)

Two-thirds (65%) of Google Users feel a search engine is important to their making a telecom service purchase decision



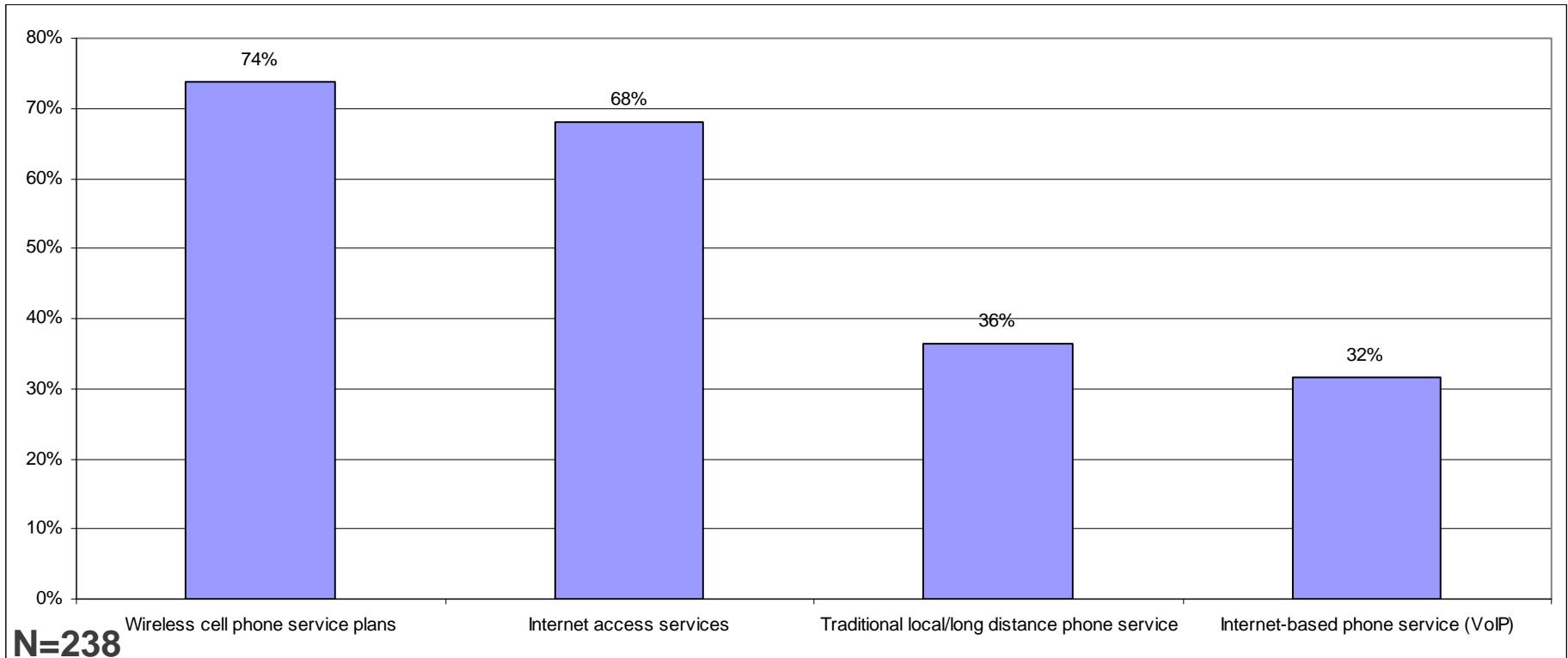
When you purchase telecommunications services how important is using a search engine in making your purchase decision?

The vast majority (90%) of Google Users say they would likely use a search engine after seeing an advertisement for a Telecom Service



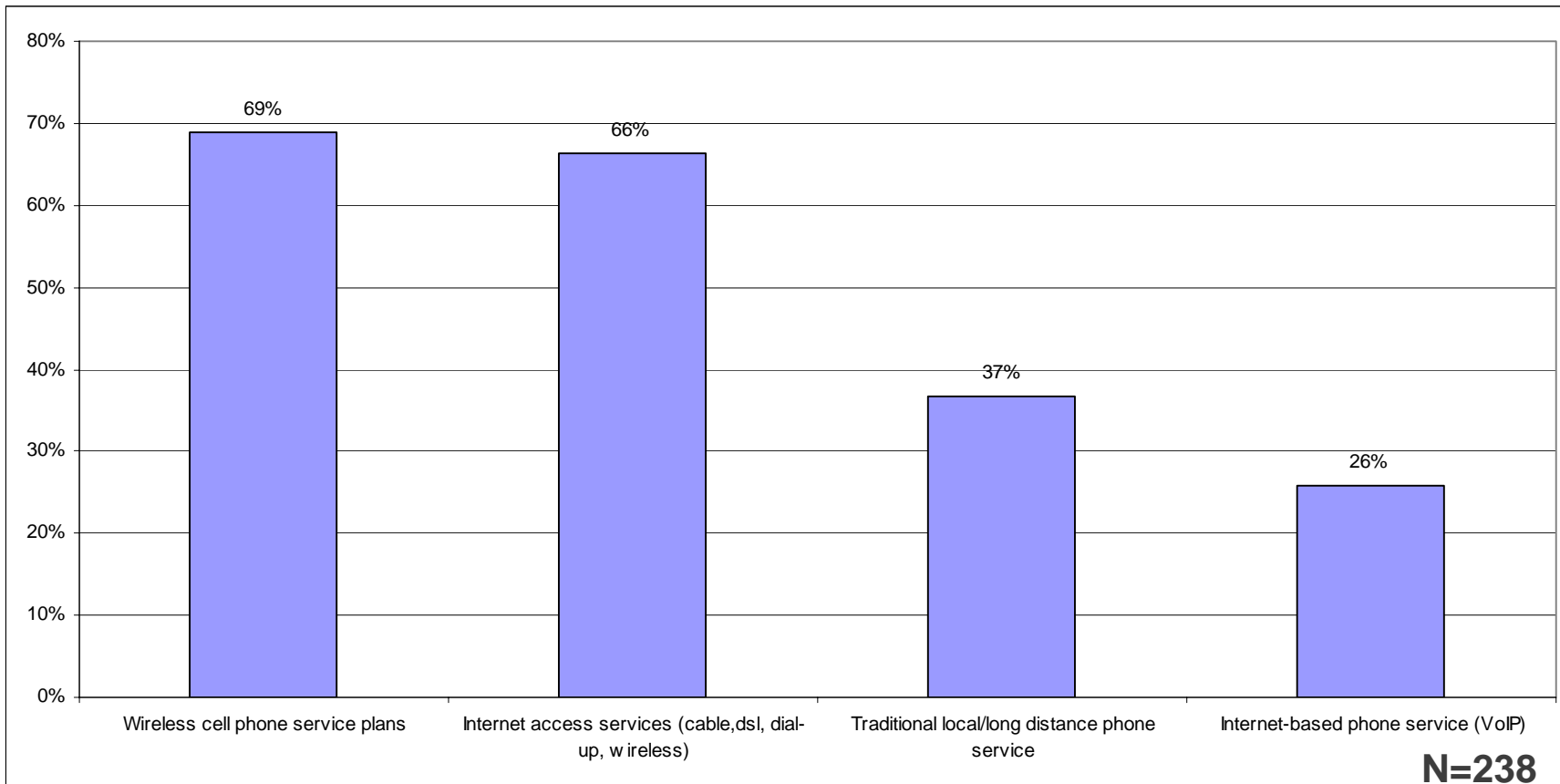
Assuming you saw an advertisement for the telecommunications service you were interested in, how likely would you be to then search for that service on a search engine?

Nearly three-quarters of Google Users use a search engine to research cell phone plans and internet access services



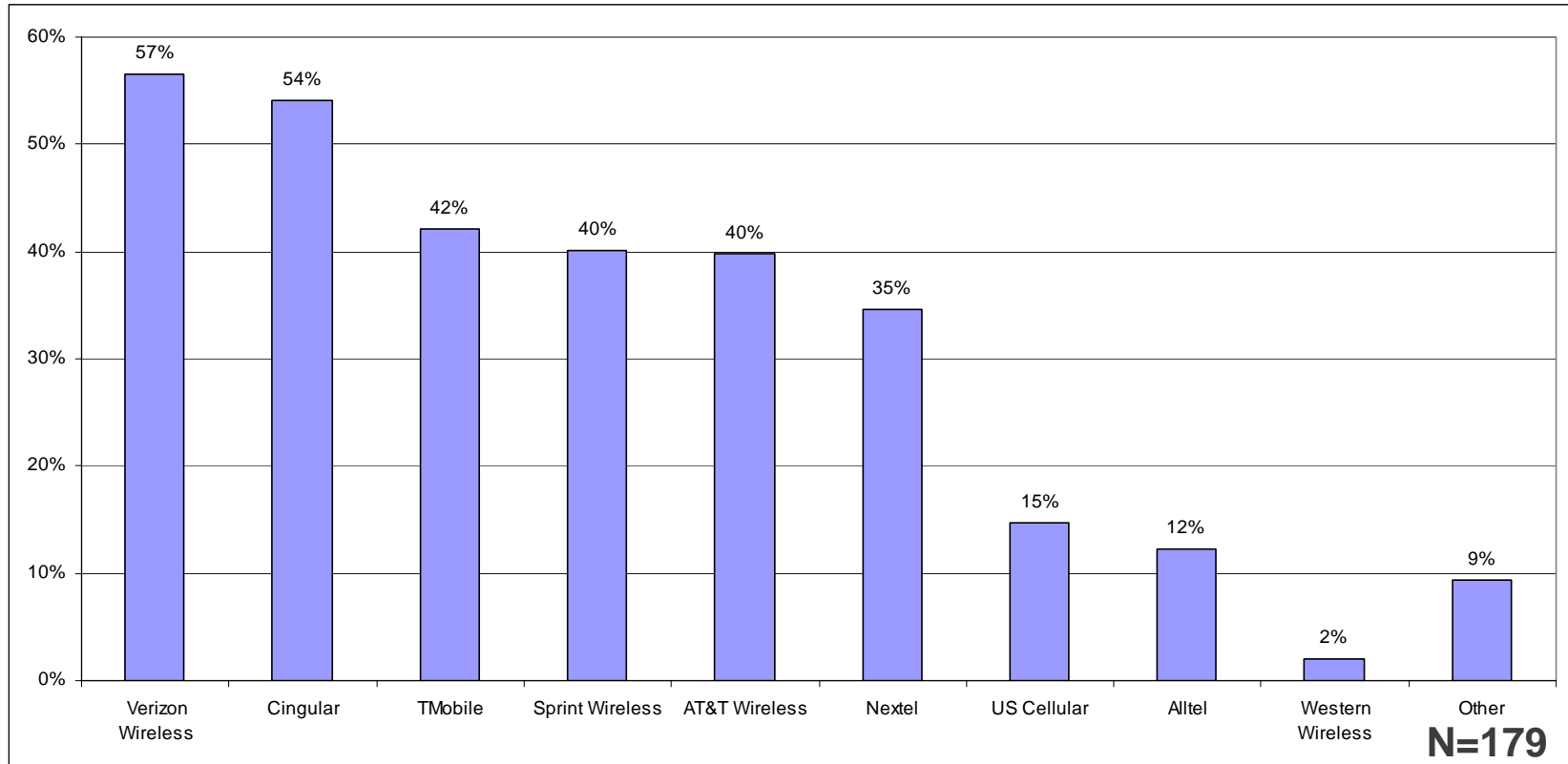
For which of the following telecommunications services do you use a search engine to help you conduct **research** on those services? Select all that apply.

Over two-thirds (69%) of Google Users use a search engine to make a purchase decision about cell phone plans and Internet access services



For which of the following telecommunications services do you use a search engine to help you reach a purchase decision? Select all that apply.

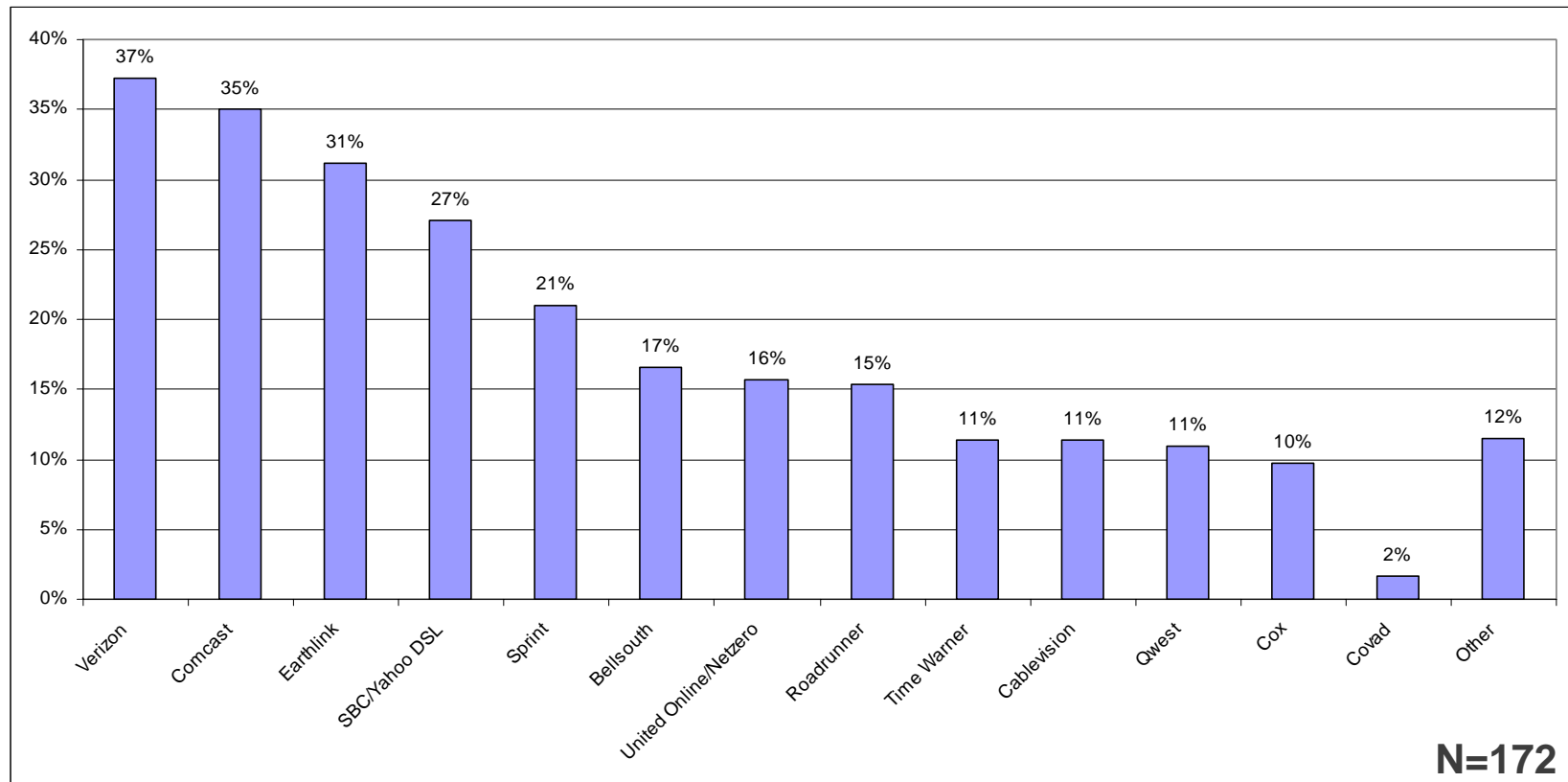
Using a search engine, over half of Google Users located Verizon and Cingular for wireless phone services



You indicated that you have used a search engine to locate sites that offer **wireless phone service plans**. Which of the following sites have you used a search engine to help you find? Select all that apply.

Source: 2005 Telecommunications Survey, conducted by GMI and Media-Screen (Mar. 2005)

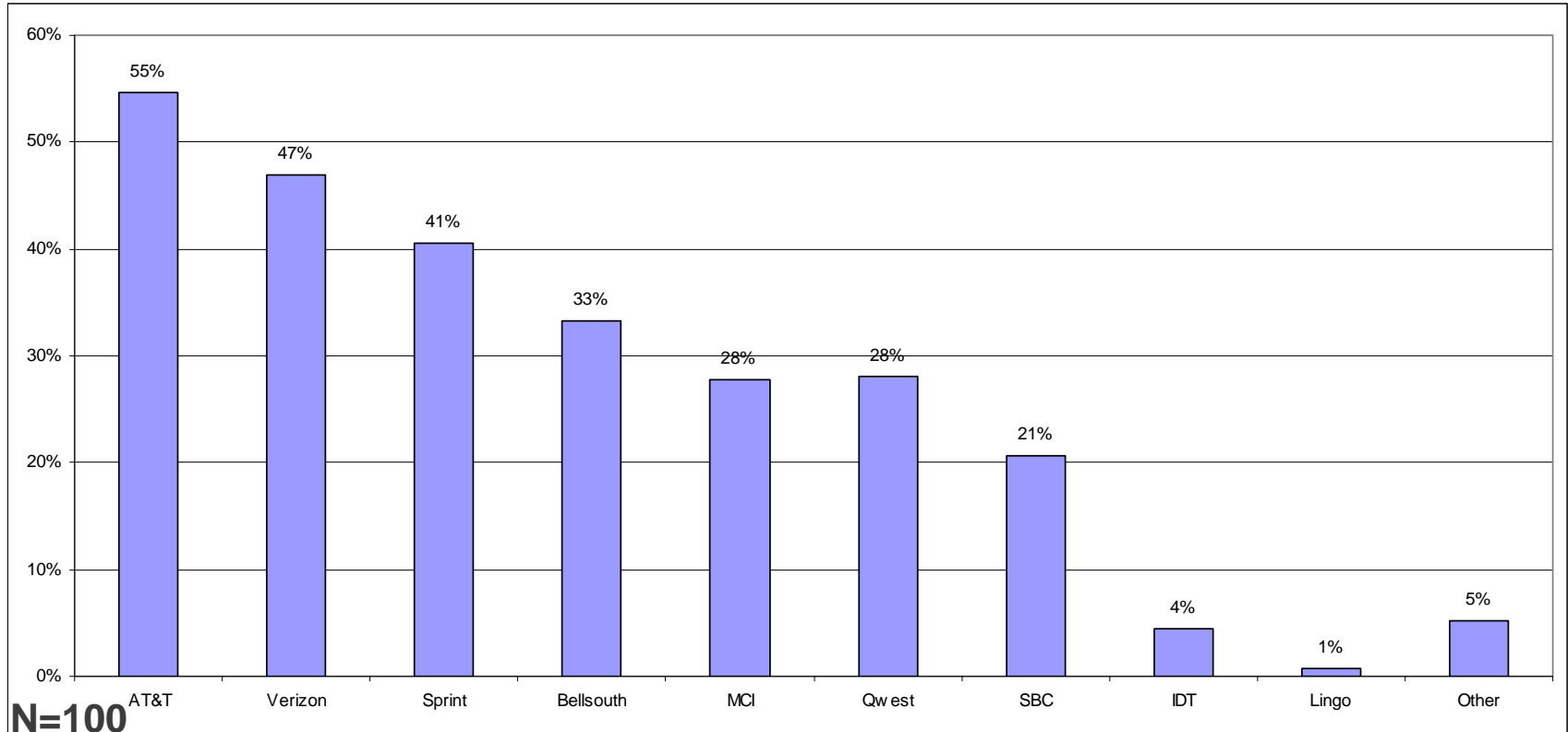
Using a search engine, one-third of Google Users located Verizon, Comcast, and Earthlink for Internet access services



You indicated that you have used a search engine to locate sites that offer **Internet Access Services (ISPs)**. Which of the following sites have you used a search engine to help you find? Select all that apply.

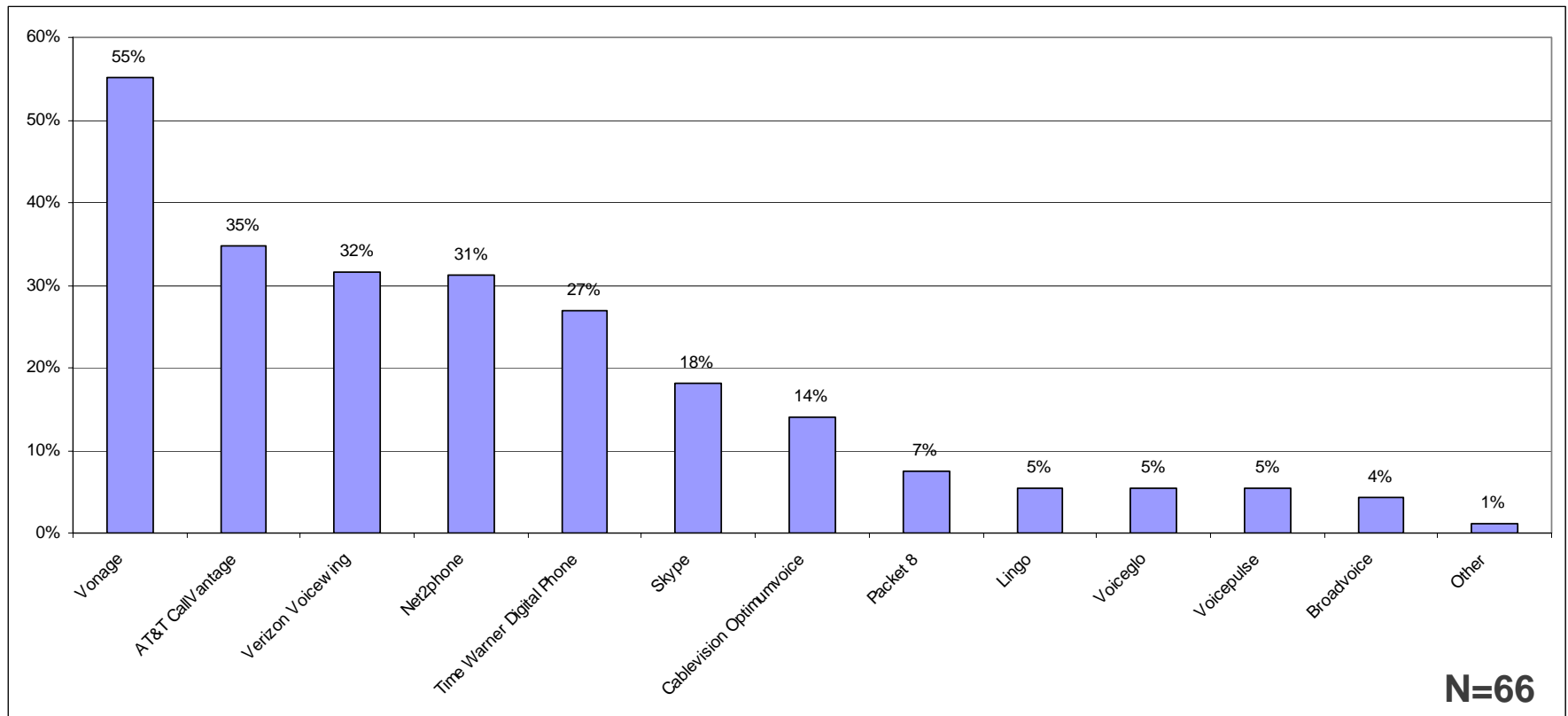
Source: 2005 Telecommunications Survey, conducted by GMI and Media-Screen (Mar. 2005)

Using a search engine, over half (55%) of Google Users located AT&T for traditional phone services



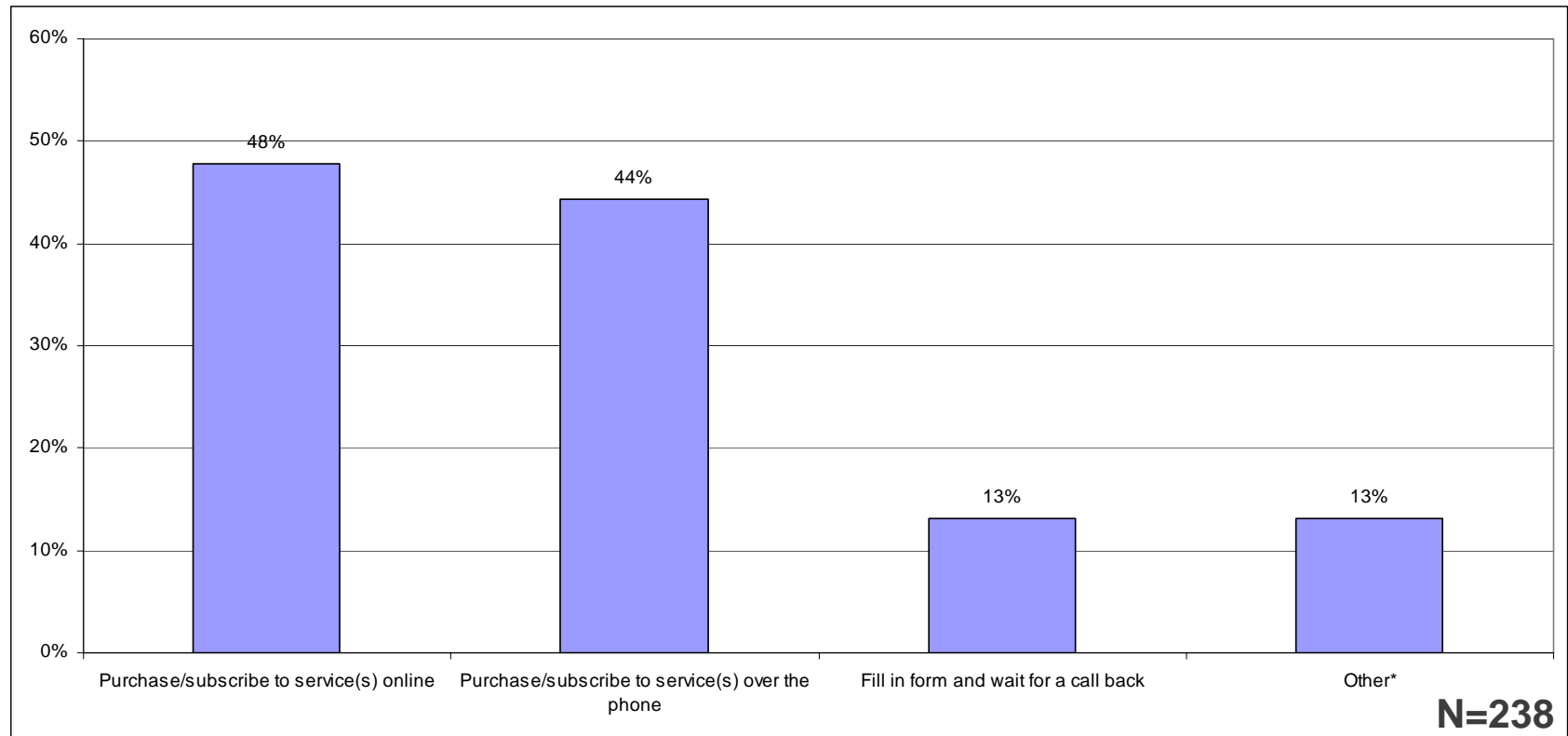
You indicated that you have used a search engine to locate sites that offer **traditional phone services**. Which of the following sites have you used a search engine to help you find? Select all that apply.

Using a search engine, Vonage was found by Google Users most often for VoIP services



You indicated that you have used a search engine to locate sites that offer **Internet-based phone services (VoIP)**. Which of the following sites have you used a search engine to help you find? Select all that apply.

Google Users are almost equally likely to purchase Telecom Services online as over the phone



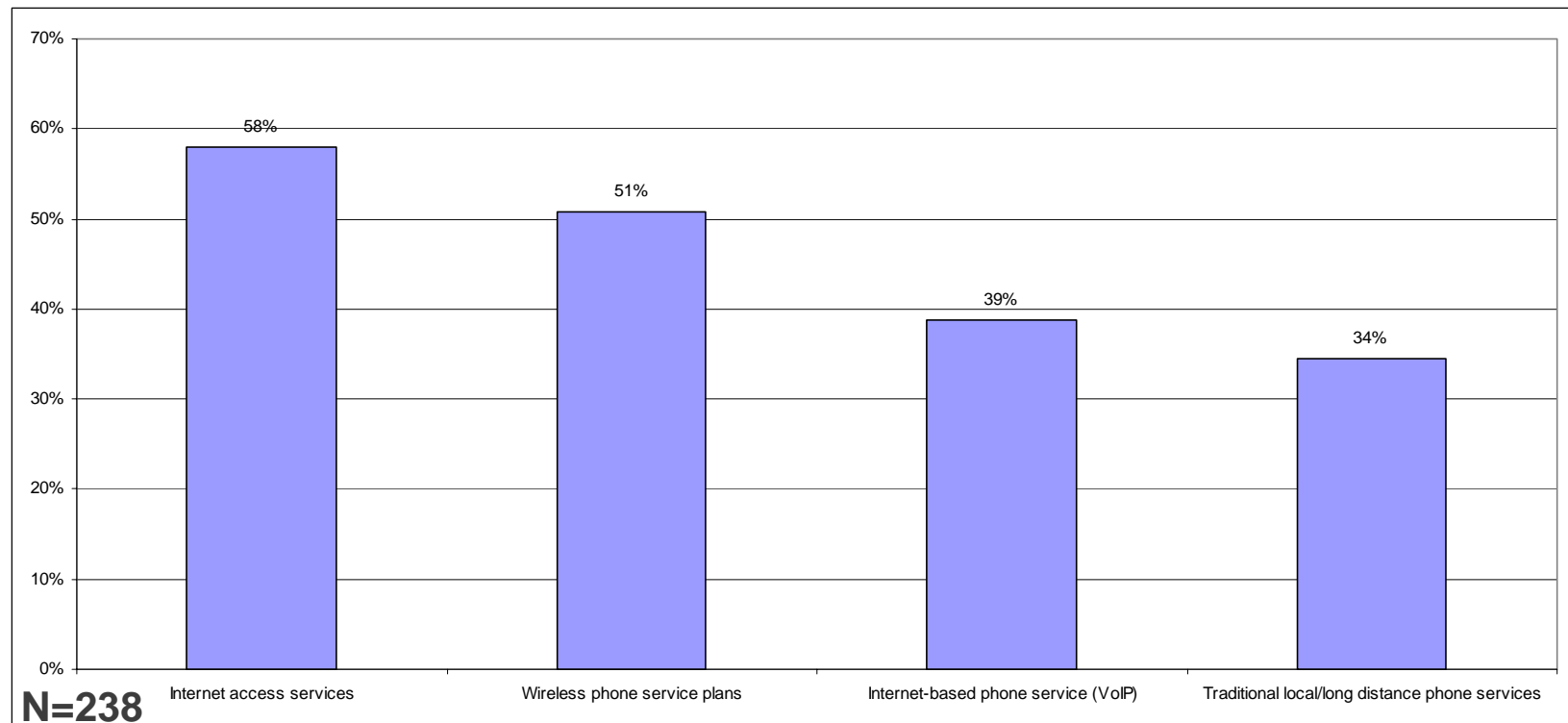
After using a search engine to help you find a site that offers telecommunications services, please indicate how you ultimately purchase/subscribe to those services: Select all that apply.

Source: 2005 Telecommunications Survey, conducted by GMI and Media-Screen (Mar. 2005)

*Approximately 11% said they would purchase/subscribe at a retail store

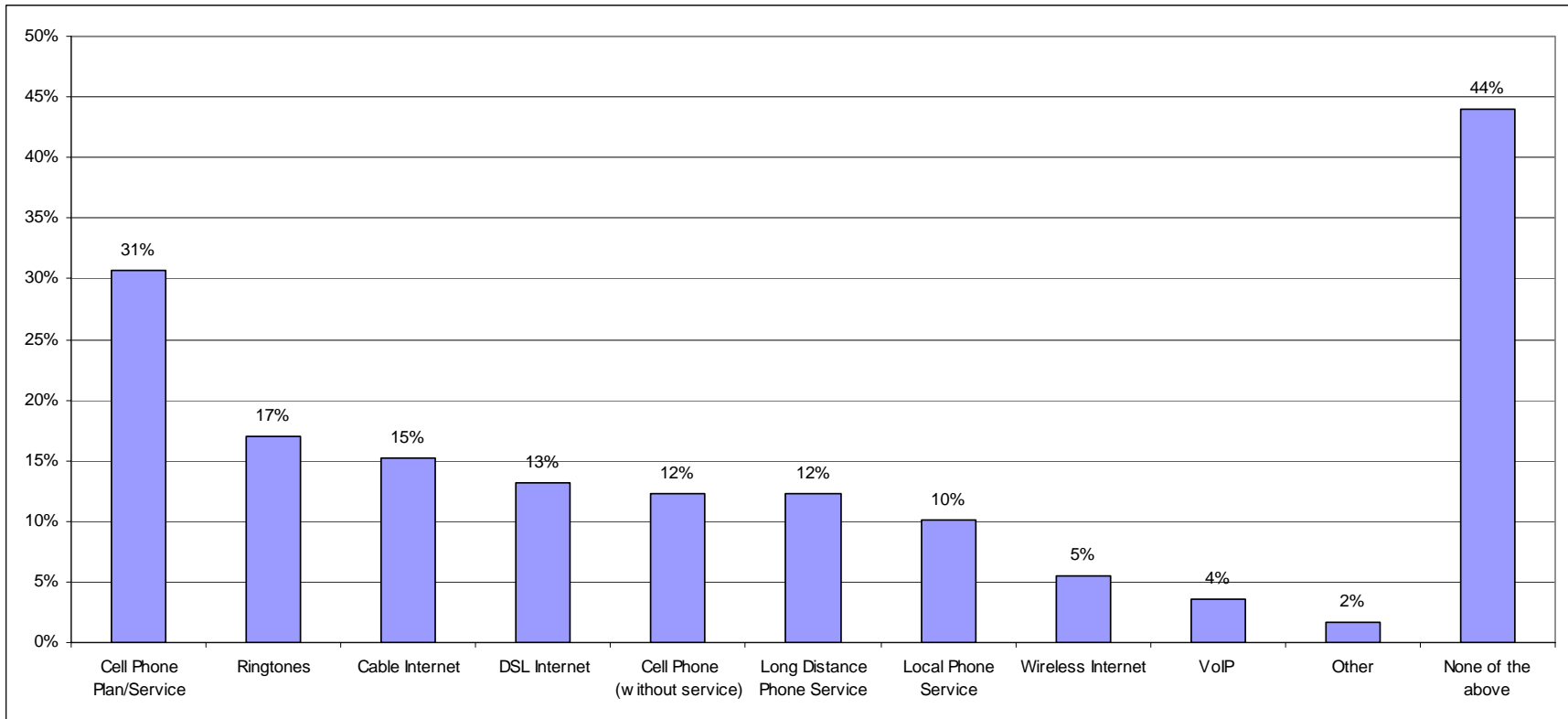
Over 50% of Google Users said they would be very/somewhat likely to purchase Internet access services and wireless phone plans online

Percent saying "very" or "somewhat" likely ("4" or "5" on 5-point scale)



For each of the following telecommunications services, please rate on a 5-point scale how likely you would be to purchase that service online.

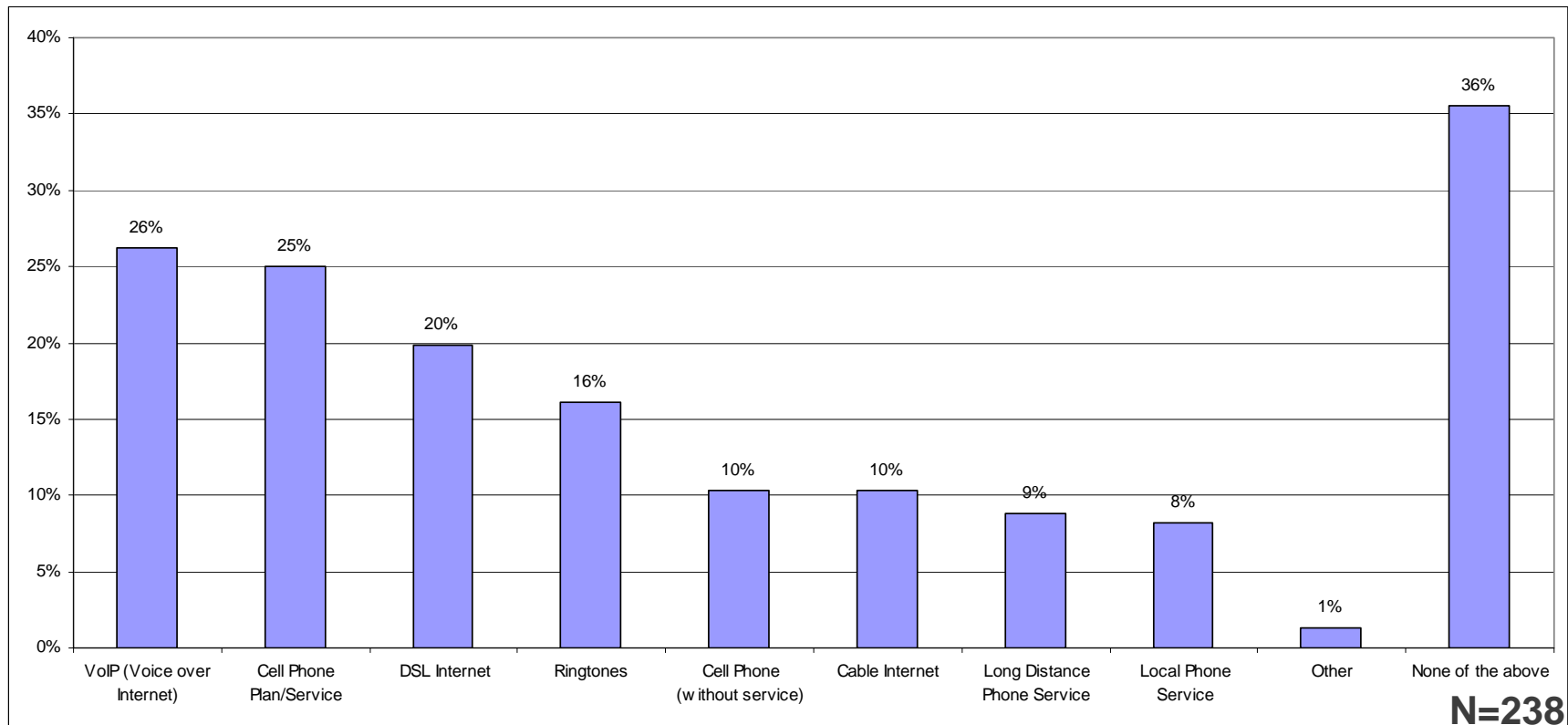
Over half of Google Users (56%) purchased Telecom Services online in the last 12 months, mostly cell phone plans/services



Which, if any, of the following telecommunications products or services have you purchased/subscribed to online in the last 12 months? Select all that apply.

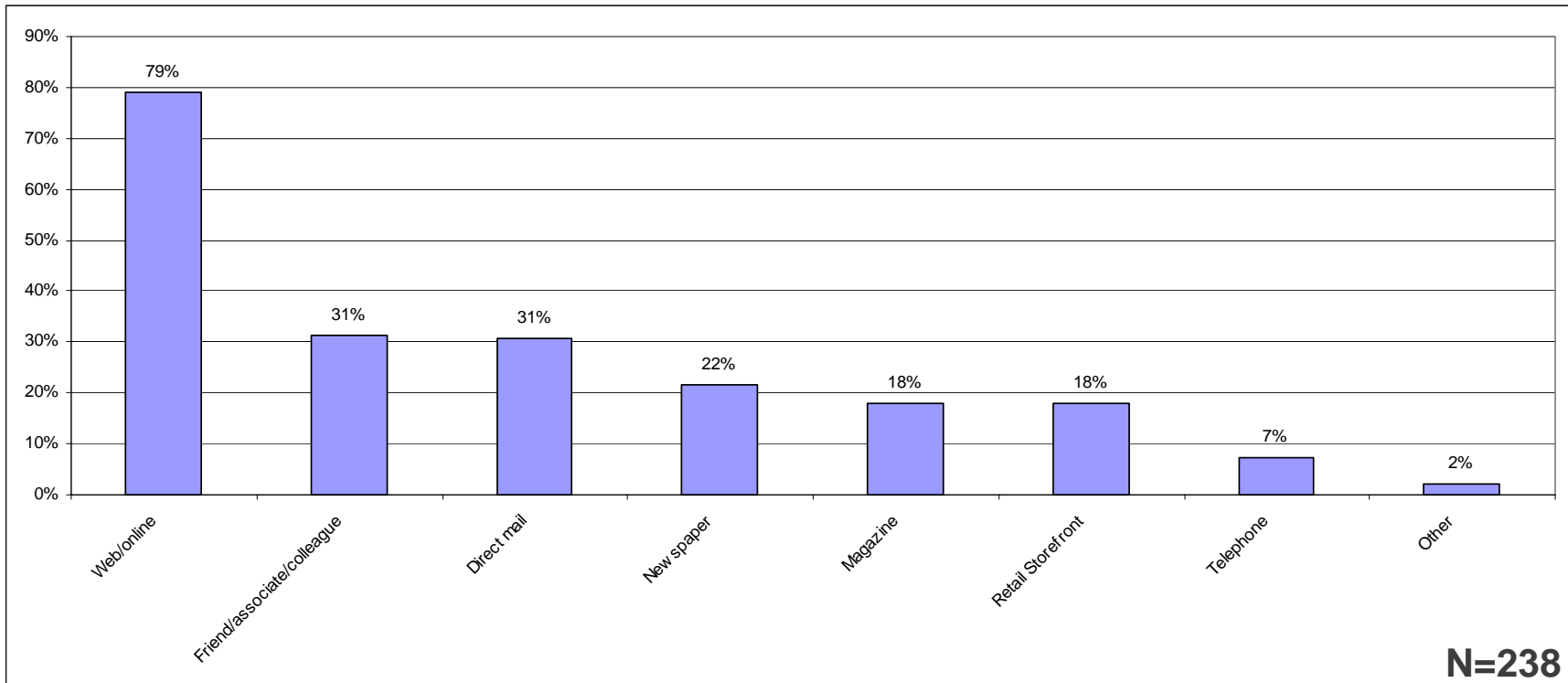
N=238

Almost two-thirds (64%) of Google Users are planning to purchase Telecom Services online in the next six months, especially VoIP and cell phone plans



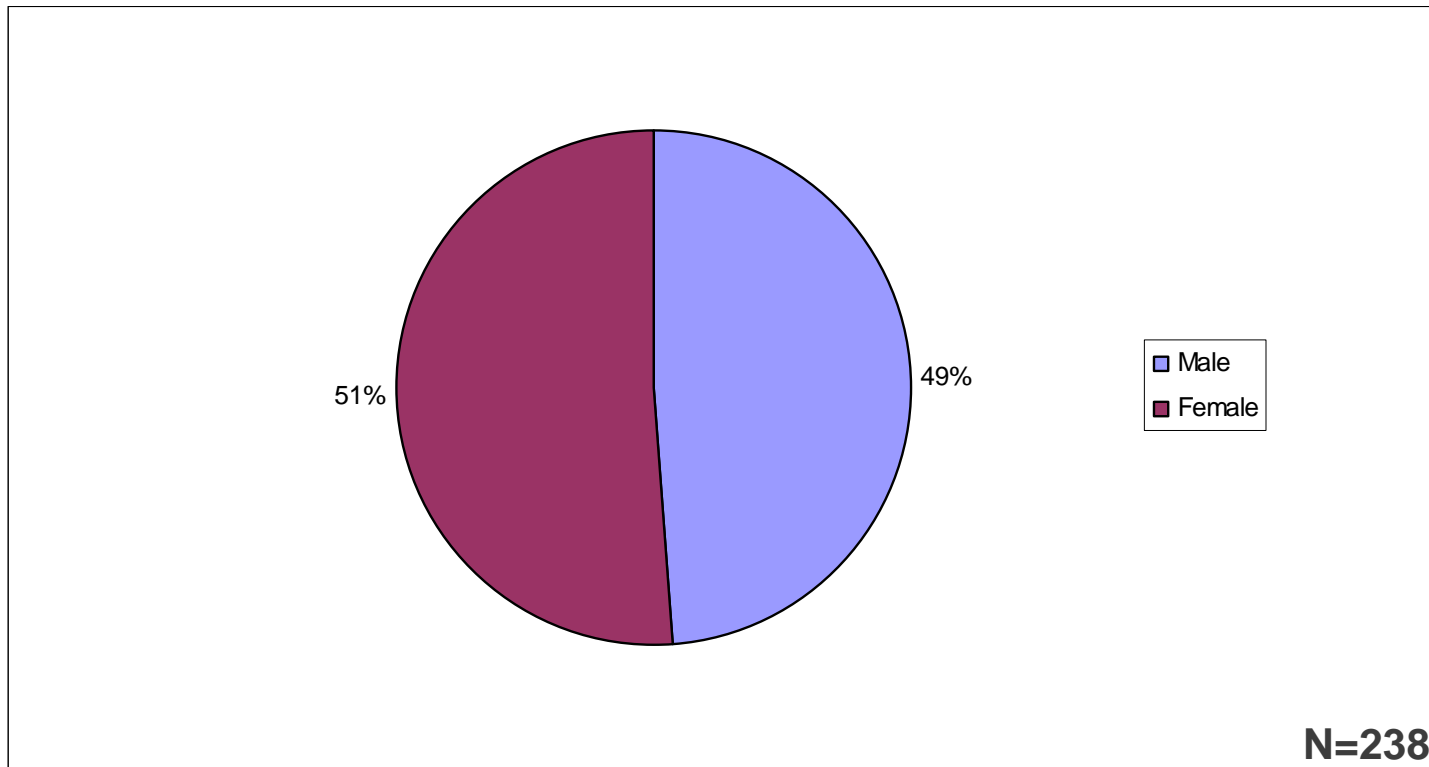
Which of the following telecommunications services are you considering purchasing/ subscribing to online in the next 6 months? Select all that apply.

Over three-quarters of Google Users prefer to find their Telecom Services online – far more than other information channels



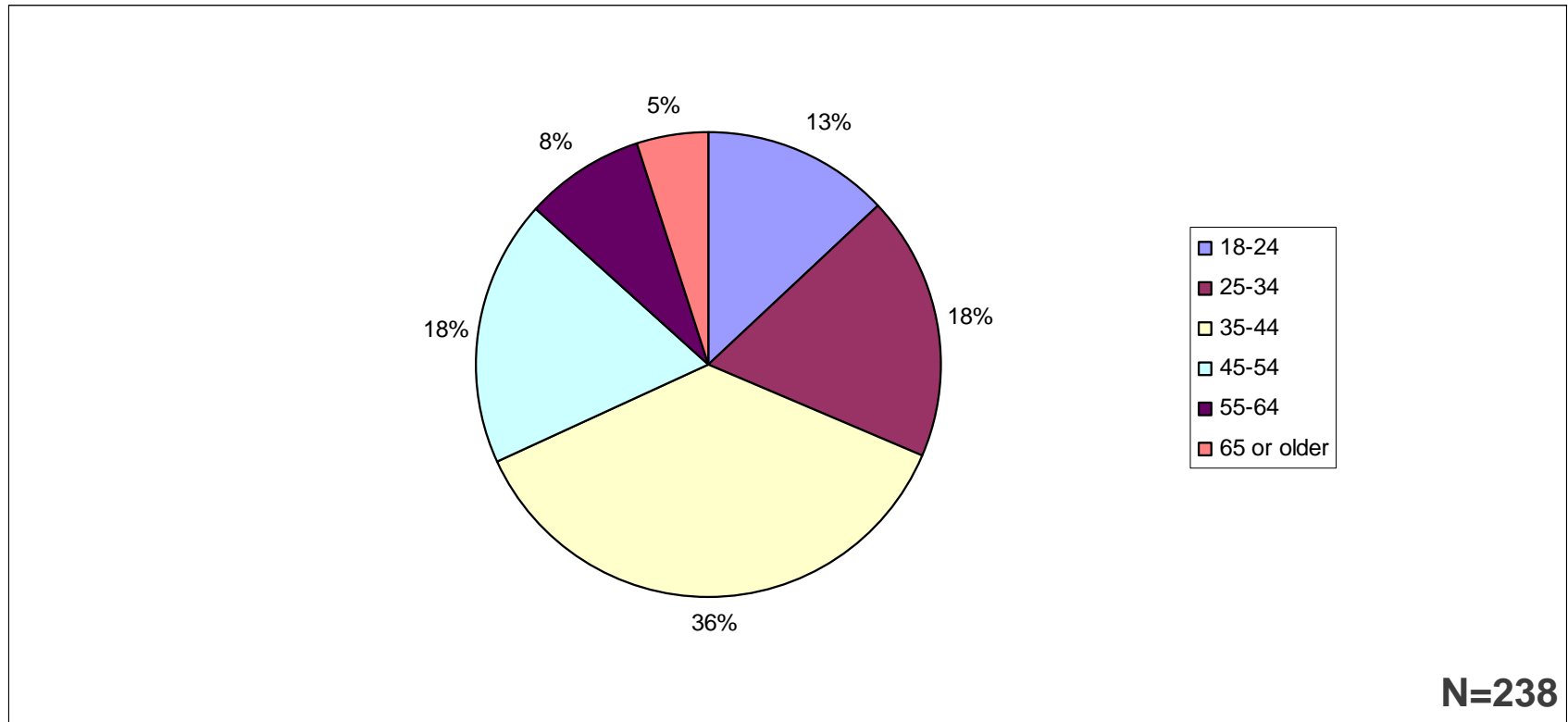
In general, how do you prefer to learn about telecommunications products or services?

Our sample is evenly divided between men and women



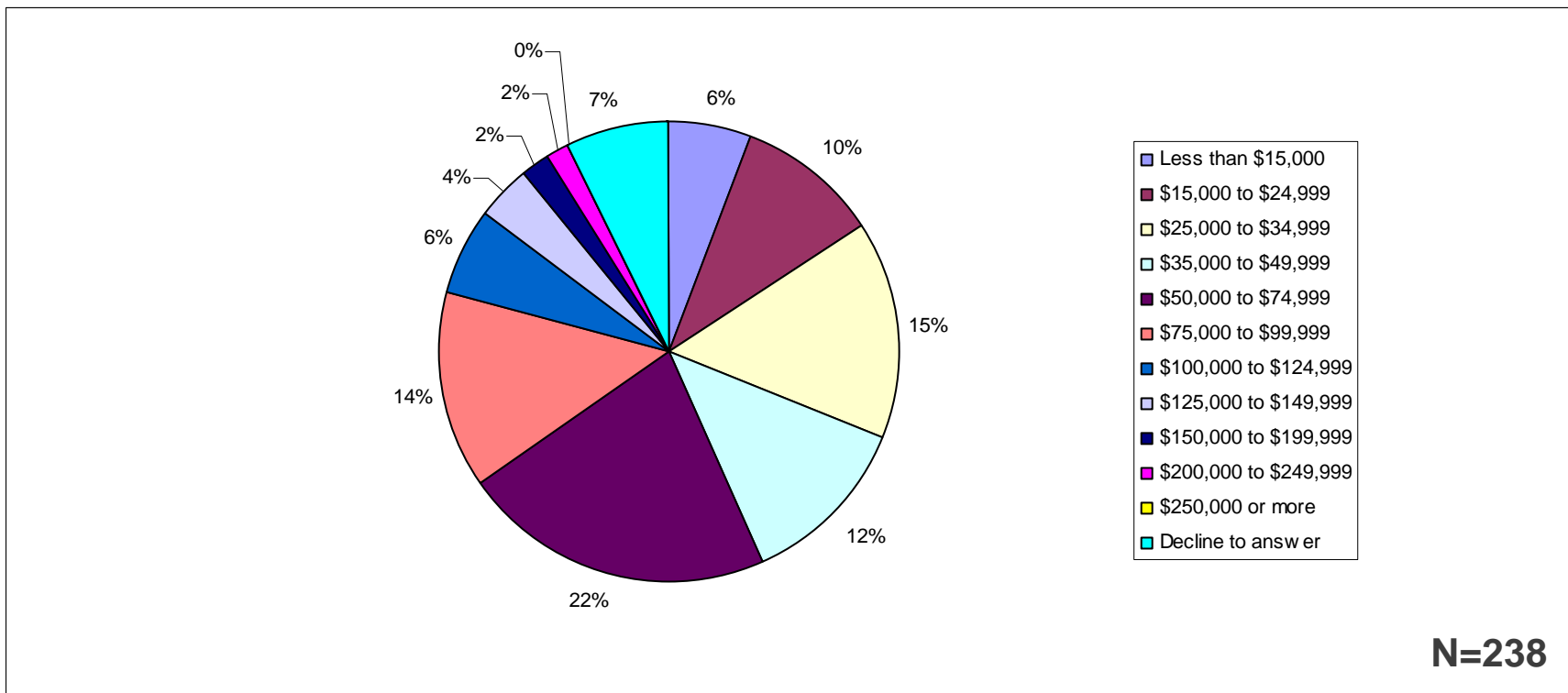
Are you:

Nearly three-quarters of the Google Users were between ages 25 and 54 years



How old are you?

Half of the participating Google Users had incomes ranging between \$35K-99K



Which of the following income categories best describes your total 2004 household income before taxes?