

The Pierz Group

asks the right questions!



Consumers & Internet-Based Telephone Lookups

This research-based paper reports on consumer usage of a range of media for telephone number lookups including print directories, directory assistance/enquiry, on-line directories, search engines and more. It then examines in detail the use of the Internet to look up phone numbers. This report details the growth in on-line lookups both on Internet directory sites and on search engines as well as the root causes behind this growth. In addition to consumer research that was conducted by The Pierz Group in July and August of this year, this report also includes key elements from the Pew Internet and Society report that was released in August of this year.

This Report Includes:

25 Charts and Tables:

- Key directory assistance/enquiry statistics; 1995 - 2008
- The use of yellow pages, white pages and white pages
- Growth in broadband access and its impact on Internet usage
- Which consumers use on-line sources most
- Which media are losing share to on-line lookups and why the US is different than many European markets
- Detail for the key market drivers for Internet usage to lookup telephone numbers
- Addresses overlap in the methods used to find phone numbers
- Provides a recommendations for leveraging current trends for future growth

Who Needs This Report?

- Directory assistance/enquiry providers
- On-line directory companies
- Data providers
- Search engine companies
- Technology suppliers to the industry
- Venture capital firms and investors in the information services arena

Understand the market, understand the players, and leverage trends that will change how you do business.

The Pierz Group asks the right questions, you get the answers.

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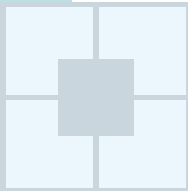
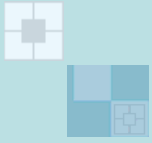


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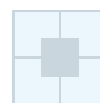
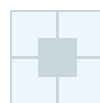
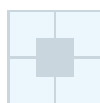
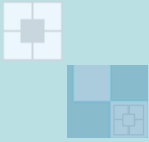


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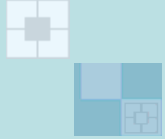
Overview

In July and August of 2004, The Pierz Group conducted a market research project, surveying 1,503 consumers across the U.S. regarding their use of directory assistance (from all sources including online applications) and their willingness to list mobile numbers.

The project yielded some particularly interesting information about the use of the Internet to look up telephone numbers. This report provides a “deep dive” into study data that details Internet usage for telephone number lookups.

Information from the “Pew Internet & American Life Project Tracking Survey, Key Findings Report” (August, 2004) is incorporated to provide additional depth.

- This report addresses several aspects of Internet use, including key information regarding the use of online directories and search engines to find telephone numbers.
- The combination of information from these two major consumer research studies provides significant insight into the overall growth in telephone number lookups, the migration from more traditional sources to electronic sources and specifically which ones. Total telephone number lookups are growing, as is the number of sources where consumers can find telephone numbers.
- Consumers who are the heaviest users of DA/DQ services today are also the heaviest users of Internet directories.
- Access to high speed connections (DSL, Cable, T1) significantly increases the likelihood that consumers will use the Internet to look up telephone numbers.
- The most frequent Internet users are not necessarily the likeliest to use the Internet for telephone number lookups.
- Location-based services or geographic information (including directions and maps) are the most-accessed services on the Internet *and* the enhanced feature consumers most want from a directory



assistance/enquiry (DA/DQ) operator. Eighty-seven percent of Americans have gotten a map or directions online; 71 percent want to get directions or location information from a DA/DQ operator.

- Everyday activities that derive the greatest efficiency from the Internet have gained the most popularity and use. Looking up a telephone number or address is the seventh most popular online activity, with 50 percent of Americans using the Internet for this purpose.
- Of those who use the Internet for telephone number lookups (50 percent), 19 percent say they use no other sources for that activity.
- Nearly 25 percent of consumers would like e-mail addresses to be available from DA/DQ operators. This result skewed unexpectedly older, with the 55-plus segment most interested in e-mail addresses through DA/DQ.

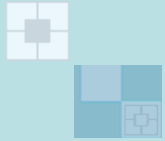
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For more information on this and other topics pertaining to the greater directory assistance/enquiry market please contact The Pierz Group. The Pierz Group provides consulting services and high value reports on the key issues facing the greater information services market. We focus on providing detailed, actionable research and analysis as well as strategic consulting services. Regular reports cover the issues and trends most likely to influence the current operations as well as future planning of providers of Directory Assistance/Enquiry services and the vendor community worldwide.

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