

# The US Directory Assistance/Enquiry Market

The Pierz  
Group

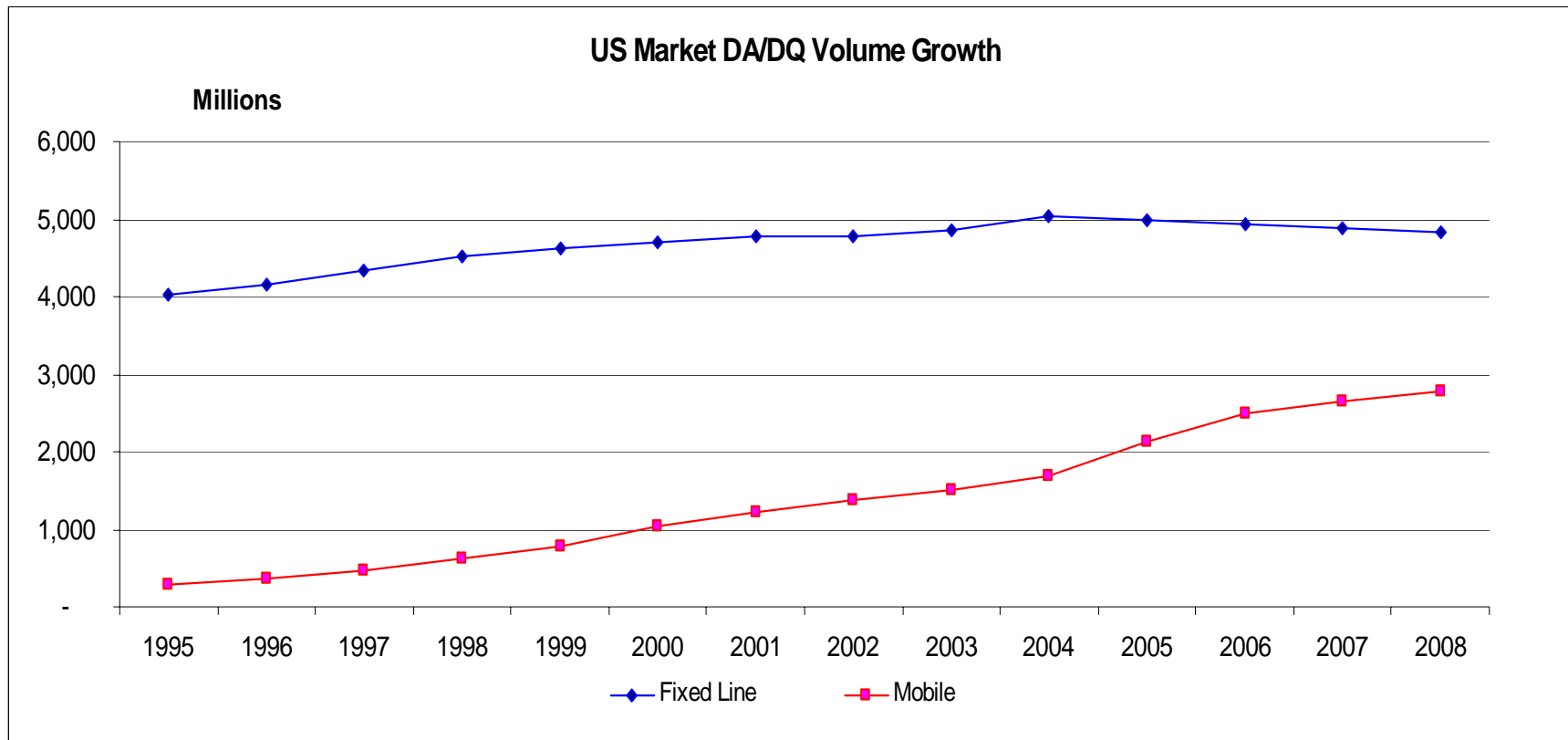
November 1, 2003



# Pierz Group Reports & Forecasts

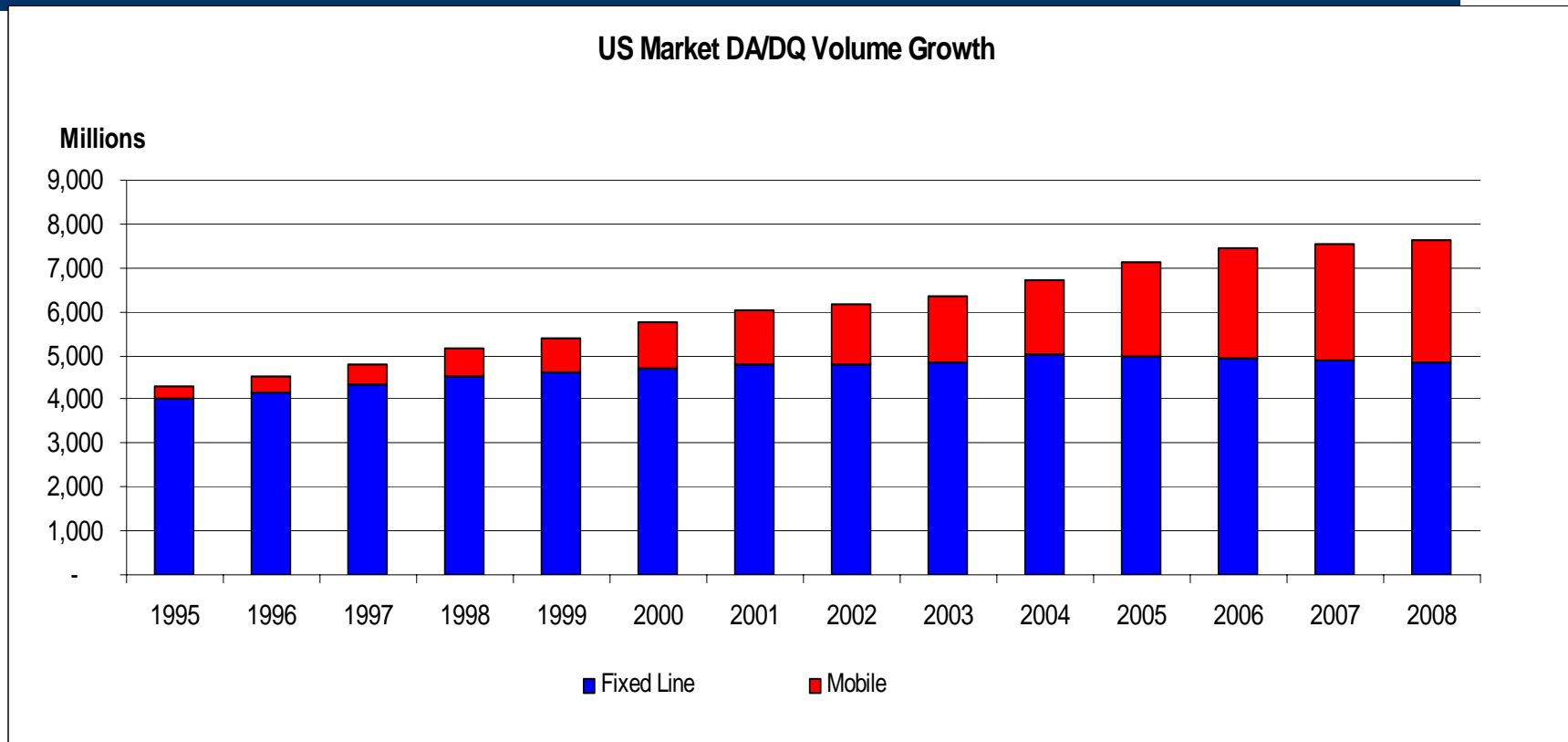
- The Pierz Group maintains a detailed global model of 211 markets with history and forecasts for each market and each region (1995-2008; data for 2009 will be added in 1/2004)
  - Fixed Line subscribers
  - Mobile Subscribers
  - Teledensity
  - Fixed line DA/DQ volumes
  - Fixed line DA/DQ revenues
  - Mobile DA/DQ volumes
  - Mobile DA/DQ revenues
- Special versions of this database can be created for targeted areas or economic strata

# US Directory Assistance/Enquiry Volumes



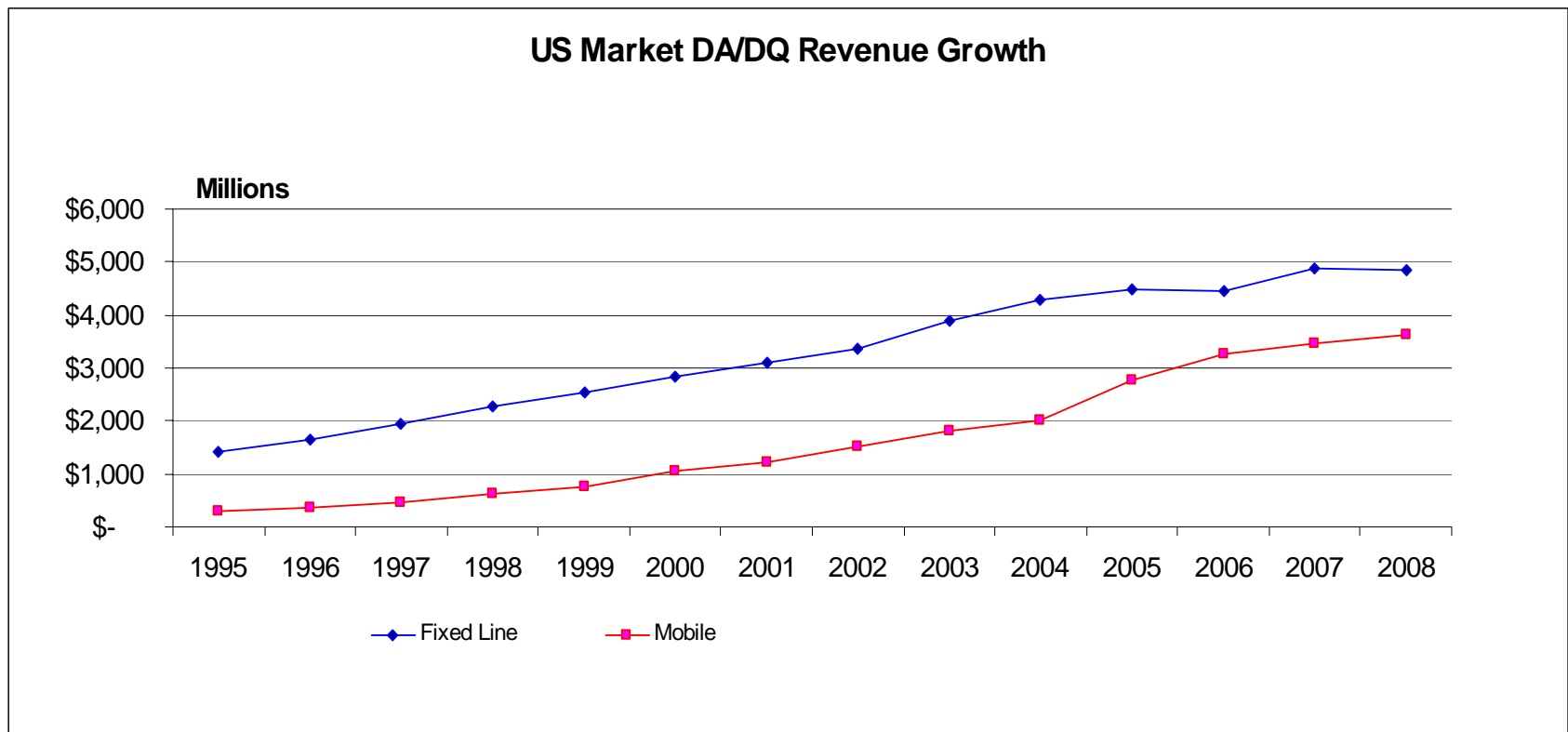
Note: Assumes full introduction of DA/DQ to wireless numbers in early 2004

# US Directory Assistance/Enquiry Volumes



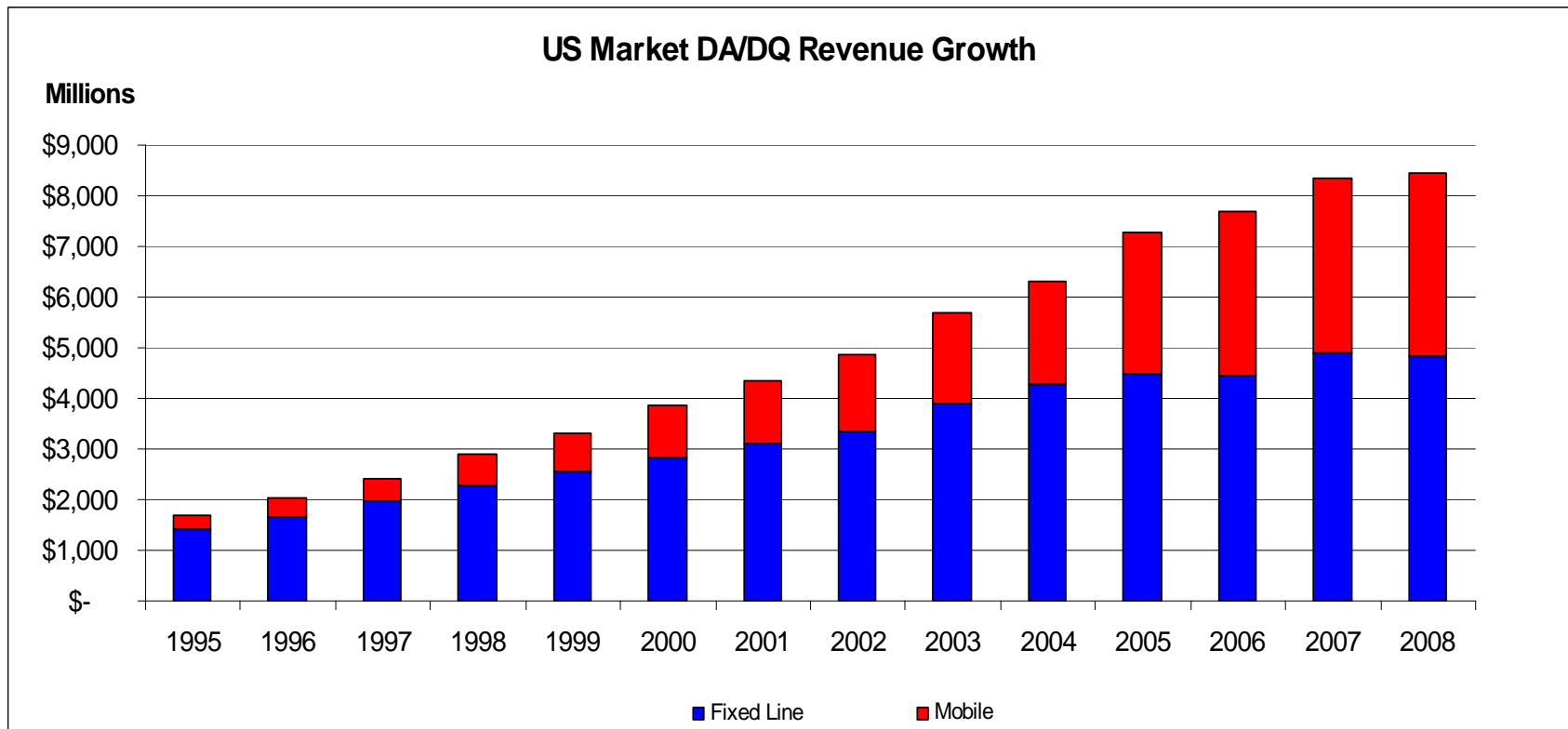
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# US Directory Assistance/Enquiry Revenues



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# The 411

- 411 Is the US short code dialing string for directory assistance/enquiry services. It connects subscribers to their provider's DA/DQ service
- Most fixed line providers have in-house operations; RBOCs dominate this market
- Most wireless DA/DQ services are outsourced to wholesale providers

## Dial Around Directory Assistance

- Many argue that the US is a competitive market, based on the number of dial around providers that can be accessed from a fixed line phone
- None has achieved more than a few percent share
- InPhone is the one dial around service that can be accessed on fixed line and mobile phones

# US Dial Around Providers

- Collectively, all dial around service providers including InPhone, are much less than 10 % of the US market

- AT&T

- “00 INFO”
- 10-10-ATT-00
- 1800-CALLATT
- NPA-555-1212

- MCI

- 10-10-9000
- NPA-555-1212

- MetroOne

- InPhone

- Sprint

- NPA-555-1212

- VARTEC

- 10-10-987
- NPA-555-1212

## Key Issues Covered by The Pierz Group

- Wireless numbers in the DA/DQ database
- Growing consumer privacy requirements
- Growing number of ways to reach an individual (shift from location-centric model to an individual-centric model)
- Deregulation; a boon for consumers?
- Automation and how to get it right
- Location based services
- Aging infrastructure globally: new technologies, new solutions
- Consumer confusion
  - Few have any idea what they pay for DA/DQ services
  - Many mobile subscribers are unaware of DA/DQ services from their mobile phones
  - Always-on world drives growth in on-line alternatives
- Implications of ENUM protocols and services enabled in a VoIP world and beyond

## Contact Us for More Information!

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