A New Report

June 30, 2004

The Pierz Group

asks the right questions!

Adding Mobile Numbers to the US Directory Assistance/Enquiry Database

This highly detailed report provides a detailed analysis of the opportunity for the introduction of wireless numbers to the directory assistance/enquiry (DA/DQ) database in the United States. It highlights successes in Scandinavian markets and which key elements are applicable to other markets. A detailed analysis of the value of this offering to consumers, wireless carriers, fixed line carriers and wholesale and technology providers is also included.

This Report Includes:

- 29 Charts and Tables including
  - Key telephony statistics; 2004 - 2008
  - Current & incremental volume & revenue streams by source
  - Revenue streams by carrier
  - Impacts of pending legislation and market churn
- Covers detail for the associated revenue impacts for each wireless and fixed line carrier
- Addresses privacy issues and solutions
- Provides a steady state analysis of the revenue streams and call volumes for European countries where WDA is in place today

Who Needs This Report?

- Directory assistance/enquiry providers interested in increasing revenues between 12 and 15 percent
- Wireless carriers seeking to increase average revenue per user (ARPU)
- Fixed line carriers
- 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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Adding Mobile Numbers to the US Directory Assistance/Enquiry Database

Overview

Mobile phones are increasingly many individuals' main method of communication. For a growing number it is now their only phone, having eschewed a land line all together. In spite of mobile phones' growing role in communications, outside of Scandinavia, very few mobile numbers are included in directory assistance/enquiry (DA/DQ) databases, or any type of directory. Adding these numbers to the database represents a substantial opportunity for DA/DQ providers and wireless carriers alike. In the US market, the total opportunity is nearly $2.0 billion in incremental revenues by 2008.

Introducing mobile numbers also represents a substantial opportunity to improve service to customers and, The Pierz Group argues, improve consumer privacy. These are not mutually exclusive ends.

Key Findings

- There are now as many mobile subscribers as fixed line subscribers in the US (main line phones).
- 53 Percent of all telephone subscribers are unreachable through DA/DQ services today. Only 47 percent of all telephone subscribers are listed in the United States. (20 percent of fixed line phones and 97 percent of mobile phones are unlisted.)
- Telemarketing has had a dramatically negative impact on individuals' willingness to list phone numbers; whether it is a home phone or a mobile phone.
  - More than half of all residential phone lines were registered on the National Do-Not-Call list prior to it going into service; As of June 2004, 62 million telephone numbers are on the list.
  - The number one reason 88 percent of consumers cite for not wanting to list their mobile number is fear of telemarketing calls.

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- 41 Percent of US consumers subscribe to a caller ID service; 57percent of 18-24 year-olds subscriber to a caller ID service.
- Only 2 percent of Americans are willing to list their mobile number without a specific privacy protection plan in place. With privacy protection this number jumps to 51 percent.
- With privacy protections over half of Americans would list their mobile phone number, and 69 percent of those under 25 would list their mobile number with privacy protection.
- A range of possible privacy protections exist. Any one of them could provide sufficient protections to motivate consumers to opt-in to a mobile database. They are technically feasible and many have completed successful in-market trials.
- Assuming a targeted message to mobile consumer at the point of sale, standard churn alone in the mobile industry would create “critical mass” in the mobile database within four years, assuming 50% opt into the database.

The Pierz Group

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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