

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.

Price: \$2,750; EIDQ members receive a 15% discount

Non-EIDQ members who purchase this report together with any other Pierz Group report (at the same time) will receive a 15% discount on both reports.

Purchase This Report Today:

Call or Email us: 248-922-1501, info@pierzgroup.com

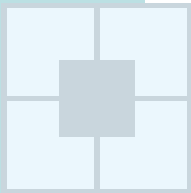
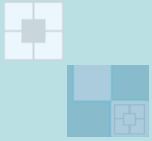


Adding Mobile Numbers to the US Directory Assistance/Enquiry Database



Table of Contents

GLOSSARY	6
EXECUTIVE SUMMARY	8
Overview	8
Key Findings	8
MARKET EVOLUTION	10
Individual Centric Communications	10
Growing Dependence on Mobile Phones	12
THE SCANDINAVIAN EXPERIENCE	14
Scandinavians List Their Mobile Numbers	14
The Scandinavian Experience	14
Denmark:	17
Overview	18
Denmark Data	19
Finland	19
Overview	19
Finland Data	19
Norway	21
Overview	21
Norway Data	22
Sweden	24
Overview	24
Sweden Data	24
OPPORTUNITY IN THE US MARKET	26
Basic modeling assumptions:	28
Point of Sale is Critical to Consumer Participation	33
Privacy as an Asset	35
Mobile Subscriber Pays: Not a Real Deterrent	36
All major carriers need to participate	37
Data Clean Up Needed	37
CARRIER IMPACTS	39
Wireless Carriers	39
Charges for DA/DQ calls	39
Additional Minutes of Usage	39
Fixed Line Carriers	41
CONSUMER PRIVACY	43
Consumer Privacy Matters	43
Permissions Based Communication	43
The Fine Print	44
Representatives Markey and Pitts: House Resolution 3558	46
Subscriber Churn	47
PRIVACY SCENARIOS	49
Perception vs. Reality	49
Key Players in the Drive to Add Mobile Numbers to the Database	49
422	50
CTIA Consortium (LLC)	50
Context Connect	52
Flatwire	54
INFONXX	55
Verizon Wireless	56
SUMMARY	57
RELATED RESEARCH	61



Contact Us Today!
info@pierzgroup.com
248-922-1501
www.pierzgroup.com

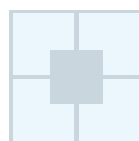
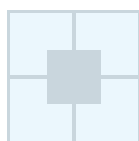
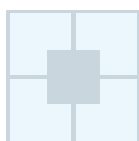
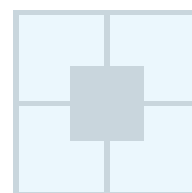
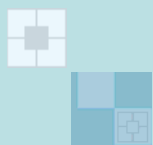


Adding Mobile Numbers to the US Directory Assistance/Enquiry Database



Table of Charts & Figures

Figure 1 Range of Contact Points for an Individual	11
Figure 2 Telephone Subscribers in the US Market: Fixed Line & Mobile	12
Figure 3 Market Summary: Denmark	17
Figure 4 Impacts of WDA: Denmark	18
Figure 5 Market Summary: Finland	19
Figure 6 Impacts of WDA: Finland	20
Figure 7 Market Summary: Norway	22
Figure 8 Impacts of WDA: Norway	23
Figure 9 Market Summary: Sweden	24
Figure 10 Impacts of WDA: Sweden	25
Figure 11 US Telephone Subscribers	27
Figure 12 Revenue Forecast for WDA in the US Market Through 2008	29
Figure 13 Wireless DA/DQ Revenues	30
Figure 14 Sources of WDA Revenues	31
Figure 15 Total Revenue Growth from WDA	32
Figure 16 Listed Mobile Numbers for Opt-In Markets	34
Figure 17 Percentage of Listed Mobile Numbers by Market for Opt-Out	35
Figure 18 Revenue Flows for US Wireless Carriers by 2008	40
Figure 19 Total Revenue Impact by Wireless Carrier	41
Figure 20 Revenue Flows for US Fixed Line Carriers	42
Figure 21 Total Revenue Impact by Fixed Line Carrier	42
Figure 22 Wireless Carrier Customer Privacy Contract Provisions	45
Figure 23 Impact of Market Churn on Opt-In Model	48
Figure 24 Unique Elements of 422 Solution	50
Figure 25 Unique Elements of CITA Solution	52
Figure 26 Unique Elements of Context Connect Solution	54
Figure 27 Unique Elements of Flatwire Solution	55
Figure 28 Unique Elements of MobileSource® Solution	56
Figure 29 Overcoming Implementation Obstacles	59



Adding Mobile Numbers to the US Directory Assistance/Enquiry Database

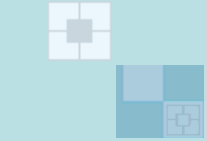
Overview

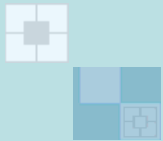
Mobile phones are increasingly many individuals' main method of communication. For a growing number it is now their only phone, having eschewed a land line all together. In spite of mobile phones' growing role in communications, outside of Scandinavia, very few mobile numbers are included in directory 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.





- ➔ 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.

Please contact us:

Phone: +1 248-922-1501
E-mail: info@pierzgroup.com
www.pierzgroup.com

Contact Us Today!
info@pierzgroup.com
248-922-1501
www.pierzgroup.com

