

YELLOW PAGES, SEARCH ENGINES, AND ELECTRONIC ADVERTISING: Pivot Points To E-Commerce And The Internet

STRATEGIES AND FORECASTS TO 2002

Market Parameters:

Local sales

Direct sales

Need for a national presence

Internet market forces

Blend the power of local presence with economics of national advertising

Connect national brands to local service outlets

Access to the lowest price available

Access to local support

Competitive analysis demands understanding of Internet opportunities as well as the current status of printed yellow pages business. Growth is achieved by offering new services and adding partners. Free real-time stock quotes provide one way to appeal to mid and upper income Internet users. Search and shopping agents allow consumers to find and compare product pricing information before making a buying decision, another way to reach out to new users.

THE STUDY ADDRESSES:

- **Market strategies for partnering**
- **Strategic positioning of directory companies**
- **Strategic market alliances / Market directions**
- **Risk/reward scenarios**
- **Access to customer bases**

You NEED This Study

COMPANIES PROFILED

Amdocs	Geosystems	Ticketmaster
America Online	Mapquest	TMP
Ameritech	GTE	Transwestern
Barnes & Noble	Imark Group	Publishing
Bell Atlantic	Infospace	Tribune
BigYellow	Knight-Ridder	US Interactive
Howard Sams	Lycos	U S West
Directory	Mcleodusa	US West Dex
Bellsouth	New York Times	VNU
Publishing	Planet Direct	Washington Post
Berry	Primedia	Yack!
Citysearch	Reuben H. Donnelley	Yahoo
CPM	SBC Communi-cations	Zulu
Direct Delivery	Sega	
Network	Switchboard	

REPORT OUTLINE

ADVERTISING EXECUTIVE SUMMARY

1. MARKET DEFINITION AND DIRECTIONS

Business model
Electronic commerce
Links for buyers/sellers
Broadband platforms
Security
**Architects of the
information age partner**
New Internet devices
Web sites/Internet
Call center monitoring
Industry challenges

2. DIRECTORY

ADVERTISING MARKET FORECASTS

Market driving forces
Summary forecasts
Internet performance
Print yellow pages:
By industry
Market shares
Market forecasts
Yellow pages local publishing
National/regional pages
White pages advertising
Number of directories
Revenue per copy
Electronic access

Cable modems/ISDN
**Asymmetrical digital
subscriber line (ADSL)**
xDSL

Internet commerce
Internet telephony

3. DIRECTORY

ADVERTISING PRODUCTS

Online yellow pages
Internet yellow pages
community positioning
SBC city guides
Bell Atlantic
Government kiosks
Local web content channels
Yahoo seniors guide
Pittsburgh live/Cox SanDiego
Printed direct marketing
Geographic yellow pages
BellSouth
Visitor yellow pages
Government blue pages

4. STRATEGIC POSITIONING

Local advertising presence
Competitive positioning
Cable TV local advertising
National accounts
Subscriber listing info
White pages highlighting
Operator services

Operator voice recognition
Microsoft voice user interface
Speech recognition
Multi language advertise
E-commerce
IBM e-business offerings
Microsoft Internet servers
Shopping/Wedding registry
Credit card payments
Error correction
Loyalty-based ad placement
Reseller agreements
Online classifieds
Job listing services
Apartments / Automobiles
Coupons / business locator
Maps / Sales channels
Electronic directory listing
Kiosks / Push technology
Postal delivery / Paging
Recycling directories
ADSL
Aware splitterless ADSL
Samsung ADSL

5. TARGET APPLICATIONS

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Business to business
Howard W. Sams & Company
Imark Group
Travel/Flowers/Food

Entertainment
Meals/Books
 Amazon.com
 Barnes and noble
News/CNN/CBS
Golf guide
Internet telephone services
Investing
 America Online/Microsoft
Document exchange
Healthcare
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ADVERTISING COMPANY
POSITIONING
Ameritech
 Internet access/yellow pages
 Library / Subscriber listing
 GE Information alliance
Bell Atlantic
BellSouth
Citysearch
Digital City
GTE
Infospace

Los Angeles Times
Lycos
Mcleodusa Publishing
Microsoft
Office Depo
SBC communications /
Pacific Bell
 U S West/ADSL
Verticalnet
Washington Post
Yahoo
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ALLIANCES AND
ACQUISITIONS
RBOC Internet yellow
pages
Ameritech / Microsoft
Ameritech/ GEIS
Ameritech / WLW
Bell Atlantic / RR
Donnelley
BellSouth / Citysearch
Citysearch / WebTV
Networks / Planet Direct

GTE buys Austrian
GTE Directories/Bell
Atlantic directory services
Infospace / Prodigy
Lambert publishing /
Infospace
LA Times / City Search
R.H. Donnelley/Digital City
SBC to acquire SNET /
Ameritech
Ticketmaster / Citysearch
Transwestern Publishing
Purchase of directories
Mast
Washington Post /
Citysearch
Yack! / Citysearch co-
branding
Yahoo! Inc. / MCI

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INTERNET COMPANY
PROFILES

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REPORT METHODOLOGY

This is the twenty-seventh in a series of market forecasts of wireline, wireless, Internet data communications, telecommunications, and information services. The project leaders have significant experience preparing industry studies. Forecasts are based on primary research and proprietary data bases. In-depth interviews are conducted with a broad range of key participants in the market.

ABOUT THE COMPANY

WinterGreen Research, founded in 1985, provides strategic market assessments in telecommunications, communications equipment, health care and advanced computer technology. Industry reports focus on opportunities that will expand existing markets or develop major new markets. The reports assess new product and service positioning strategies; new and evolving technologies; and technological impacts on products, services, and markets. Market shares are estimated. Leading market participants are profiled, and their marketing strategies, acquisitions, and strategic alliances are discussed. The principals of WinterGreen Research have been involved in analysis and forecasting of international business opportunities in telecommunications and advanced computer technology markets for over 30 years.

ABOUT THE PRINCIPAL AUTHORS

Ellen T. Curtiss, Technical Director, co-founder of WinterGreen Research, conducts strategic and market assessments in technology-based industries. Previously she was a member of the staff of Arthur D. Little, Inc., for 23 years, most recently as Vice President of Arthur D. Little Decision Resources, specializing in strategic planning and market development services. She is a graduate of Boston University and the Program for Management Development at Harvard Graduate School of Business Administration.

Susan Eustis, Vice President, co-founder of WinterGreen Research, has done research in communications and computer markets and applications. She holds several patents in microcomputing and parallel processing. She is the author of recent studies of the Regional Bell Operating Companies' marketing strategies, worldwide telecommunications markets, and of a study of Internet and Intranet markets. Ms. Eustis is a graduate of Barnard College.

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June 1998

Memo to:

Internet electronic directory markets promise to be as big as print directory markets, without eroding the traditional yellow pages print market. Incremental revenue will develop slowly, with companies willing and able to offer low price points initially developing market share early. Those with early market share hold the promise of becoming the leaders for a long time to come.

A new study from WinterGreen Research addresses the issues for both print and electronic Internet directory publishing. The study clarifies alternatives available. Enclosed is a brochure describing the study **YELLOW PAGES AND ELECTRONIC ADVERTISING: PIVOT POINT TO E-COMMERCE AND THE INTERNET, STRATEGIES AND FORECASTS TO 2002** provides a concise, dynamic presentation. The study provides forecasts of a range of market segments and provides market share analysis.

Further information about WinterGreen Research is available at the Internet web site www.wintergreenresearch.com. We respectfully request that you purchase the study using the form on the brochure or on the web site.

Thank you,

Susan Eustis