



The '411' on Mobile Directory Assistance: New Consumer Survey Findings

This is a transformative period for directory assistance (DA) service providers and callers alike. Call volumes are skewing toward mobile devices and competitive threats exist in the form of mobile Internet search, downloadable mapping applications and free DA alternatives. These competitive challenges raise strategic and tactical questions for mobile carriers and their service providers (about pricing and content) in the near term. The findings of a new Local Mobile Search consumer survey present a snapshot of mobile DA usage and of an industry very much in transition.

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Overview & Findings

Local Mobile Search (LMS) conducted a survey of mobile directory assistance (DA) callers on behalf of V-Enable, using Greenfield Online's consumer panel. The survey was fielded and completed in November 2007. There were 671 respondents, most falling within the 25-54 age range, 61% female and a distribution that directly mirrored U.S. mobile carrier market share.

- **Exploring caller frequency, location, intent** – The survey sought to obtain a picture of current mobile 411 usage behavior and related consumer attitudes. Among other things, the survey explored call frequency, user intent, caller location and use of and satisfaction with "free 411" alternatives.
- **Typical mobile DA user** – The most common usage frequency among respondents is "once every three months." The majority of 411 calls are made in the car and typically seek information regarding business location, hours and product or service information. The "typical" mobile DA user thus emerges as a highly "qualified" consumer en route to conduct a transaction.
- **Usage while traveling** – Contrary to expectations, the majority of mobile DA users said they did not use 411 while traveling and expressed preferences for other methods for finding, for example, local restaurant information.
- **Enhanced DA content** – A majority of mobile DA users were unaware of the availability of enhanced content (e.g., maps, sports, stocks, movie showtimes) or expressed limited interest in these types of content. However, this does not definitively mean such content, properly promoted, would not be sought out by mobile users.
- **DA price awareness and sensitivity** – The overwhelming majority of mobile DA users did not accurately know how much they paid on a per-call basis for 411. While price was cited as the main reason for not calling 411, there is also a segment of callers who are fairly price insensitive.
- **Free DA usage** – Roughly three-fourths of mobile DA users have not used one of the free alternatives to date. However, customer satisfaction levels are generally comparable to traditional paid DA among the sample that had used both. Free DA had higher satisfaction on price, while advertising on free DA was given a neutral rating.

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