

Sprint PCS is bringing you a  
higher generation of technology ...

See page 7 for details!

See inside for the latest  
Sprint PCS Coverage Map



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# Sprint PCS News

Fall/Winter ~ 2000



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### Managing your account with ease!

Have you ever wanted to know how many minutes you've used on your Sprint PCS Account? Is it time to update your billing information or e-mail address? Sprint PCS has made it easy to manage and monitor your account — online or over the phone!

If you have Internet access or the Sprint PCS Wireless Web™ option, [www.sprintpcs.com](http://www.sprintpcs.com) is a "must" visit!

- Our web site is in the process of redesign, offering new features and easier navigation
- You'll have quick access to a wide array of account management tools
- For more details on managing your account, see "Questions & Answers" on page 6

Even if you can't log on to the Internet, you can still manage your account — right from your Sprint PCS Phone!™ Just press **222** on your Sprint PCS Phone. You'll enter our state-of-the-art automated information system where you can:

- Check minute usage
- Make a payment
- Hear your balance due
- Find out payments received
- And the **222** call is completely free and won't use any of your minutes

With these convenient self-management tools, it's never been easier to manage your Sprint PCS Account!

And remember, Sprint PCS has the only all-digital, all-PCS nationwide network built from the ground up for clearer calls, serving more than 300 major metropolitan areas and major airports.



The clear alternative to cellular.™

**Sprint PCS®**


## This just in ...


### A simple way to get credit

Sprint PCS provides outstanding call quality and clarity, but once in a while you may encounter a dropped call, wrong number or an issue relating to call quality. If so, you can request a credit to your account for up to three times a month through an automated response system. Adjust your account automatically by following these simple steps:

- Press **2** on your Sprint PCS Phone<sup>SM</sup>
- Press option **1**
- Press option **2**
- Then press option **3** again
- Enter your 10-digit Sprint PCS Phone Number
- Enter your billing address zip code
- Your account will be adjusted for one courtesy minute of air time

### Understanding text messaging

Ever have a message icon  appear on your phone, but you have no voicemail messages? You probably received a text message or a Sprint PCS Web Alert.<sup>SM</sup> To view these text messages, simply follow these steps:

- Go to your message inbox by pressing **6** once
- Select either "3: Text" or "4: Browser"
- Select "View" or "OK"
- Once your text message is highlighted, select "detail" to read your text message
- Once your text message is read, the  should go away

### Share instant messages with your family and friends

With the Sprint PCS Wireless Web,<sup>SM</sup> America Online<sup>SM</sup> and the AOL Instant Messenger<sup>SM</sup> service, you can now send and receive instant messages with people in your AOL Buddy List<sup>SM</sup> groups from your Sprint PCS Phone. It's fast, simple, quiet and Sprint PCS is the first to have it on a wireless phone. So, when you're looking for conversation without all the talking, send an instant message — across the room or across the country — on our nationwide network.

America Online and Buddy List are registered trademarks of America Online, Inc. AOL Instant Messenger is a service mark of America Online, Inc.

This just in ...



## Sprint PCS Wireless Web™

Update

### Lots of online options for you

Log on to the Sprint PCS Wireless Web™ with your Sprint PCS Phone™ and check out our newest wireless Internet sites, including:

- **GiftCertificates.com** — This year, shop smarter, not harder! Save time and give loved ones the gift of choice from GiftCertificates.com. Now, instead of dashing around town, you can log on to the Sprint PCS Wireless Web and select an e-mailable gift certificate for the person who has everything. Can't decide? Give them a SuperCertificate™ redeemable at GiftCertificates.com for original gift certificates to over 500 popular merchants. It's fast, easy, and you never have to set foot in a store!

Go to [www.sprintpcs.com](http://www.sprintpcs.com) for a complete list of wireless Internet sites, including E\*TRADE, America Online®, Ticketmaster.com, NeuDoor, MSN Mobile, eBay®, Hollywood.com and more.

### Play Games on Your Sprint PCS Phone™

Need a little break from your hectic schedule? Check out these popular wireless Internet entertaining sites by: Boxerjam, Indigo, FunCaster, MysicryNet, Frughop, nGame and JAMDAI. To play games, access your Sprint PCS Wireless Web Browser and connect to the Internet. On your home page, scroll down and select "Games." Visit these sites today and you'll have fun at your fingertips!

### Try the Sprint PCS Wireless Web FREE for 6 months!\*

Get the Sprint PCS Wireless Web Option FREE for six months on any plan starting at \$29.99. The Sprint PCS Wireless Web Option allows you to use your minutes for voice or data. It includes 50 free updates per month that can be used for notification of new e-mail or for updates. Get the information you want when you want it: use e-mail, shop, reserve movie tickets, check stock quotes, news, weather and more. Visit [www.sprintpcs.com](http://www.sprintpcs.com) to sign up!

Sprint PCS Wireless Web Connection and Browser applications require a wireless Internet-ready phone. Some features may not be available while roaming.

\*The promotional six months of free Sprint PCS Wireless Web option is available through 11/30/01 and only available on service plans of \$29.99 and above. Sprint PCS Wireless Web usage above plan minutes will incur additional charges at the applicable override rate. After six months you will be charged the \$9.99 monthly fee unless you call to deactivate this service. Sprint PCS Wireless Web Service may not be immediately available in select service markets.

## National Coverage Map





## Questions & Answers

### Can I manage my account over the Internet?

A. Why YES, you can! Sprint PCS is in the process of improving their web site, through the addition of new features and easier navigation. There are actually TWO ways to manage and monitor your account over the Internet ... by logging on to [www.sprintpcs.com](http://www.sprintpcs.com) or by logging on to @SprintPCS via the Sprint PCS Wireless Web Browser on your Sprint PCS Phone™!

Our full web site, [www.sprintpcs.com](http://www.sprintpcs.com) can be accessed via a PC. Once on the site, you'll find you can completely monitor and manage almost every aspect of your account. You'll have the ability to:

- Track your minutes
- Make a one-time payment online by check or credit card
- Make an automatic monthly payment by credit card
- Learn more about Sprint PCS features and services
- Find answers to your questions

When you access @SprintPCS via the Sprint PCS Wireless Web Browser, you'll find our streamlined interface where you can do all of the management functions we just mentioned ... and you can even look up area codes and country codes!

The only thing clearer than our wireless communications is our commitment to customer service. Log on today and see for yourself!

### Are there different ways to pay my invoice?

A. Sprint PCS has several ways you can pay your invoice:

- **Pay by Mail** – Send a check or money order with the bottom portion of your invoice when it arrives each month. Posting time is approximately 3-7 business days.
- **Pay through Sprint PCS Automated Payment** – Sign up and have your invoice paid automatically each month! To enroll, go to [www.sprintpcs.com](http://www.sprintpcs.com). You can also press **2 2 2** on your Sprint PCS Phone to speak with a Sprint PCS Customer Care Advocate or dial 1-888-211-4PCS (4727) from a landline phone. Transaction is processed on invoice due date.
- **Pay on the Internet** – Pay your invoice online using your credit card or checking account. Just go to [www.sprintpcs.com](http://www.sprintpcs.com), log on to the "Manage" section, click on "Invoice and Payment" and follow the links. Posting time is approximately 4 hours.
- **Pay through your Sprint PCS Phone** – Enter **2 2 2** on your Sprint PCS Phone. Then, follow the voice prompts to pay with your check or credit card. Posting time is approximately 4 hours.
- **Pay through RadioShack®** – Pay by cash or check at participating RadioShack locations. A service fee will be charged. Posting time is approximately 24-48 hours.
- **Pay through Western Union®** – You can pay by cash at any of Western Union's 38,000 locations, using code city "Sprint PCS." For the nearest location, dial **2 2 2 2 2 2** on your Sprint PCS Phone or call 1-800-325-6000 from any phone and select "option 2." There is an \$11.95 service charge for using this method. Posting time is approximately 4 hours.

## What's new with Sprint PCS

### Sprint PCS is bringing you to the next level of wireless technology


In communications, speed is everything. And when it comes to research and development in high-speed wireless communications, Sprint PCS is an industry leader. With increased speed in wireless communication, you gain increased efficiency, improved error correction and better overall data integrity – all of which translate into better calling clarity and faster connections when using the Sprint PCS Wireless Web.<sup>SM</sup>


Sprint PCS has been developing faster communications systems using a process known as "third-generation code division multiple access 1x technology" ... or 3G CDMA 1x for short. Utilizing this technology, Sprint PCS will be able to increase data speeds over the Sprint PCS Wireless Web from 14.4 kbps (or 14,400 bits per second) up to 1.44 kbps (or 144,000 bits per second) – an astounding 900% increase in speed. And that's just the beginning.

In addition, Sprint PCS will be conducting trials and testing of 3G 1xEV DO ... a higher generation of high-speed transmission technology. Using this new system, speeds up to 2.4 mbps (or 2,400,000 bits per second) are possible. This would mean an incredible 1,666% increase over previous speeds.

New and exciting applications are enabled with each increase in speed, similar to personal computer applications. Sprint PCS is excited about the possibilities of the future as data speeds leap forward.

### Faster payment with

Now it's easier and faster than ever to pay your Sprint PCS invoice over your Sprint PCS Phone.<sup>SM</sup> Just press  for a direct connection. Then follow the voice prompts to pay with your credit card or check. It's that simple!

 is a free call, and your payment will post to your account in approximately 1 hour. Try it the next time you pay your Sprint PCS invoice.

Customers with an established credit history and in good standing with Sprint PCS can use this convenient payment option.

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All other trademarks, product names and company names herein are the property of their respective owners.

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What's New



## Sprint PCS offers & promotions

### Share your plan minutes with Sprint PCS Add-a-Phone™

For just \$10 a month for each phone, you can share the clarity of Sprint PCS with a spouse or relative without sharing your Sprint PCS Phone!™ How? Start by giving them your former phone. Then choose a new phone from our wide selection, such as the dual-band Sprint PCS Touchpoint Phone,™ available now for just \$129. Both former and new phones will share your invoice. To sign up, go to [www.sprintpcs.com](http://www.sprintpcs.com) or press **8** **8** from your Sprint PCS Phone.

### A winning team for Breast Cancer Awareness

Sprint PCS and Samsung® kicked off the third annual "Speak Out" for Breast Cancer Awareness campaign in October, National Breast Cancer Awareness Month. Sprint PCS and Samsung also teamed up to donate \$500,000 to benefit The Susan G. Komen Breast Cancer Foundation.

The campaign focuses on helping couples deal with the challenges of facing breast cancer together, and features Stefanie Spidman, a breast cancer survivor, and her husband Chris, a former All-Pro linebacker, as spokescouple. Along with others who have tackled this disease, the Spidmans are featured in *Journey of Hope: Couples Speak Out About Breast Cancer*. This free, limited edition support kit with a workbook and video commissioned by Sprint PCS and Samsung helps couples discuss sensitive issues such as intimacy, spirituality, finances, and long-term survivorship. The workbook was written by Lillie Shockney, education and outreach director of the Johns Hopkins Breast Center and an eight-year breast cancer survivor.

The "Speak Out" campaign also included a breast cancer awareness summit in New York City and over 40 local "Call Days" to remind women of the three steps of early detection: monthly breast self-exams, regular clinical exams and annual mammograms after the age of 40. Remember, always consult your physician first.

To get a copy of the support kit while supplies last, call 1-877-718-HOPE (4673). Or, for more information about the "Speak Out" campaign, visit [www.sprintpcs.com](http://www.sprintpcs.com).

\* If Sprint PCS Add-a-Phone is selected as a free option when you sign up for a Sprint PCS Advantage Agreement™, only one user receives the Sprint PCS Add-a-Phone option at no additional cost. Option may not be used in conjunction with other promotions, discounts or credits. The Sprint PCS Add-a-Phone option is available on a Sprint PCS Service Plan of \$49.99 or higher. Service activity of users sharing minutes must appear on a single invoice. Limit two Sprint PCS Add-a-Phone options per service plan. Offer subject to credit approval. All offers available for a limited time and subject to withdrawal without notice.



## Recommend us to a friend and you can each earn a \$10 service credit

### Earn valuable service credits

Sprint PCS is always looking to give you more. That's why we're continually coming up with valuable offers for great customers such as you!

#### Get \$50 when you sign up for Sprint 7x AnyTime™

Sign up for Sprint 7x AnyTime residential long-distance service and receive \$50 in Sprint savings checks\*. You can use these checks toward future Sprint long-distance or Sprint PCS invoices or redeem them at any Sprint Store. Just sign up for Sprint 7x AnyTime and pay only 7¢ a minute on state-in-state residential long-distance calls\*\*. That's 24 hours a day, 7 days a week. Plus, sign up today and we'll even waive the \$5.95 monthly service fee as long as you remain a customer of both Sprint and Sprint PCS\*\*\*. Call 1-877-842-5102 or visit [www.sprint.com/50news](http://www.sprint.com/50news) to sign up today.

#### \$10/\$10 Sprint PCS Referral Program

Refer a friend to purchase a new Sprint PCS Phone™ and service plan and you'll each get a \$10 service credit. It's easy! Your friend must press **9** **9** **9** on their new Sprint PCS Phone and follow the voice prompts. Tell them to have their new Sprint PCS Phone Number and your Sprint PCS Phone Number nearby. Then when they've maintained service for 30 days, you'll both receive a \$10 service credit.

Remember, the more new customers you refer, the more credits you can earn. Those you refer will appreciate great wireless communications – and you'll all appreciate the service credits you earn!

### Keep up with the latest changes and enhancements

Sprint PCS Service grows and improves all the time ... and you can receive e-mail notifications of changes to our web site, special promotions and offers, and new products. To add or update your e-mail to the Sprint PCS mailing list, just follow these easy steps:

1. Go to [www.sprintpcs.com/manage](http://www.sprintpcs.com/manage) and sign in
2. Click on the "Customer Care" tab
3. Click on "Change Account Information"
4. Finally, click the "Edit" button at the bottom of the page and enter your e-mail information

You'll then receive periodic messages from Sprint PCS – but no unsolicited mail, because we do not share your private information. So get in the know. Register for free e-mail updates today!

\*No cash value. Savings checks are payable to Sprint, Sprint PCS and the local telephone company only. One offer per household. Allow at least 8 to 12 weeks to receive the \$50 Sprint savings checks, consisting of five \$10 checks.

\*\*Residential Dialt calls only. One line per account. In-state rates will vary. Please call 1-866-623-4665 to confirm in-state rates. Offer not available in Alaska and Hawaii. Certain other restrictions may apply.

\*\*\*Offer valid for new Sprint residential long-distance customers only. A credit of \$5.95 for the monthly service charge will appear on each monthly invoice as long as you remain an active customer of the Sprint 7x AnyTime calling plan and Sprint PCS. Both accounts must be maintained in good standing to continue to receive promotion. Offer may not be used in conjunction with certain other promotions, discounts and credits and may be withdrawn without notice. Offer expires 1/31/01.

† Completed referral must be received by Sprint PCS within 90 days of activation to receive invoice credit offer. A customer may not refer themselves. Referred person's phone purchase must occur after referring person's phone purchase and after 3/15/2000. Referring purchaser and referred purchaser on Prepaid, Major National Accounts or Employee Advantage that are National Accounts are not eligible for offer. Invoice credits appear on third party's invoice. Referring person's credit awarded on basis of first referral call received for each eligible purchase. Both referring purchaser and referred purchaser must have an active account for 90 days or longer before the reward can be awarded. Sprint PCS employees, third-party employees and customers on the Owner Advantage Plan may participate and are limited to one referral credit per month and cannot be referred. In addition, Sprint PCS employees cannot refer other Sprint PCS employees. Third-party employees cannot refer other third-party employees and customers on the Owner Advantage Plan may not refer other customers on the Owner Advantage Plan. Please allow 6-8 weeks for processing. Sprint PCS reserves the right to alter or discontinue this program at any time without notice. Program may not be available in select affiliate markets.

†† By providing Sprint PCS with your e-mail address, you grant us your permission to receive future e-mails from us. We will not share your e-mail address with outside third parties.

Some features may not be available while roaming.

Special Offers

---

Our gift  
to you:  
**\$50**

Plus, save \$5.95 a month  
with Sprint 7c AnyTime™



**Sprint PCS® customers only:**

## **Receive \$50 in Sprint savings checks...**

**simply by signing up for Sprint 7¢ AnyTime™  
residential long distance!**



**Call any time and pay just 7¢ a minute.\***

Now you can save on your residential long-distance service. Pay just 7¢ a minute on state-to-state calls – 24 hours a day, 7 days a week.

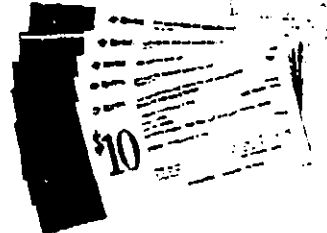
**Monthly service fee waived – you save \$5.95 per month.**

Because you are a valued Sprint PCS customer, the \$5.95 service fee will be waived every month.\*\* You can save up to \$71 a year!

**Plus, \$50 in savings just for Sprint PCS® customers.**

You'll also receive an exclusive gift: \$50 in Sprint savings checks† to use in the next few months toward your Sprint PCS or Sprint long-distance bills ... or purchases at any Sprint PCS Retail Store.

It's our gift to you for choosing Sprint residential long-distance service!



**To sign up and receive your \$50  
in Sprint savings checks, call  
1-888-823-4665**

**or visit [www.sprint.com/50checks](http://www.sprint.com/50checks)**

**As a Sprint PCS® customer, please accept your \$50 gift!**  
**Call 1-888-823-4665 today**  
**or go to [www.sprint.com/50checks](http://www.sprint.com/50checks)**

\* Residential Dist One calls only. One line per account. In-state rates will vary. Please call 1-888-823-4665 to confirm in-state rates. Offer not available in Alaska and Hawaii. Certain other restrictions may apply.

\*\* Offer valid for new Sprint residential long distance customers only. A credit of \$5.95 for the monthly service charge will appear on each monthly invoice as long as you remain an active customer of the Sprint 7c AnyTime calling plan and Sprint PCS. Both accounts must be maintained in good standing to continue to receive promotion. Offer may not be used in conjunction with certain other promotions, discounts and contests and may be withdrawn without notice. Offer expires 12/31/00.

† No cash value. Savings checks are payable to Sprint, Sprint PCS and the Local Telephone company only. One offer per household. Allow at least 6 to 8 weeks to receive the \$50 Sprint savings checks, consisting of five \$10 checks.

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The clear alternative to cellular.™

**Sprint PCS®**

S131



### **Sprint PCS<sup>®</sup>**

The latest breakthrough in wireless technology.  
Call 1-877-520-1029 for details.



### **Internet Access**

Surfing the Net is simple with EarthLink Sprint Internet Access.  
Call 1-888-424-0139 for details.



### **Internet Call Waiting**

Don't miss that call! Get Internet Call Waiting for when you're online.  
Call 1-800-877-4646 for details.



### **Local-Toll Calling**

You can use Sprint for toll calls you make within your local calling region.  
Call 1-800-891-4803 for details.



### **International Calling**

Economical calling plans and Sprint FÖNCARD<sup>™</sup> access to the countries you call most.  
Call 1-800-891-4803 for details.



### **Personal Conferencing**

Talk to as many as 10 people anywhere in the United States.  
Call 1-888-403-2305 for details.



### **Collect Calls**

Dial 1-800-2-SPRINT to save money when calling collect!



### **National Directory Assistance**

Instant access to all the numbers you need to stay in touch.  
Dial 00 or 1 + area code + 555-1212.

If you earn miles through a Sprint airline program, call 1-800-669-8585 for mileage opportunities on select products and services.

Your whole family can  
**stay in touch** with the  
convenience of Digital Technology





and dependable wireless service from AT&T Wireless is the next best thing. You can call from the recital to order dinner — or call your office from the orthodontist's waiting room.

**FREE BONUS!**

**1 800 363-1366**

**Get a FREE Executive Headset for your new wireless phone plus FREE delivery!**

### ***Stay connected***

The more you have to get done, the more you need wireless service. And the more people who depend on you — your family, your co-workers, your friends — the more you'll appreciate the power and dependability of one of North America's largest digital wireless networks. With great Digital service and a new Digital multi-network phone from AT&T Wireless, you can stay connected — and stay in control.



For free delivery, call toll-free 1.800.2 JOIN IN.

**YOUR CLOSEST VERIZON WIRELESS COMMUNICATIONS STORES ARE:**



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VERIZON WIRELESS COMMUNICATIONS STORES

KANSAS	Oak Park Mall Kiosk 1st level, near O'Connell's	Wichita West Anna & Kelllogg Dr Just south of Towne West	Kansas City North 64th St & I-26
Laneville	199th St & Quivira	Topeka Phyllis Plaza Across from West Ridge Mall on Wahnehamer	Lee's Summit 281 Hwy & Tudor Rd
Murksboro	LJohnson Dr & I-35	Winchester West of Ridge Rd on 21st St	Liberty 291 Hwy & Liberty Dr
Olathe	110th St & Strong Line Rd	MINNESOTA	St. Joseph Two blocks N. of Cano Field Rd on Duff Hwy
Overland Park	Two blocks west of Midway on 119th St	Independence 40 Hwy & Midland Rd	
		Lincoln Lincoln Independence Center Kiosk Main Entrance	

www.verizonwireless.com

New equipment with a 1-year agreement required. \$175 early termination fee per line. Subject to terms of Service Agreement and Price Plan. Requires post payment. Cannot be combined with other offers. Usage subject to net 15 minutes. Limited equipment use. Limited time offer of both features is 1000. Late and other charges. Digital service not available in all areas. CDMA phone required. Minimum hours are 12:00 am Saturday to 11:00 pm Sunday. Unlimited long distance service to domestic long distance area. Not for use during area. Service charges apply to total line long distance rate. New activation required. Phone offer buy one, get one free offer applies to Motorola V2260 digital phone only. 2-year agreement required. Other equipment in event Verizon Wireless requests other equipment use. Limited time offer. Phone and phone price may vary by authorized agent location. Motorola and the Stylized V logo are registered trademarks of Motorola, Inc. © 2001 U.S. Pat. & Tm. Off. Motorola, Inc. CDMA is a trademark of Qualcomm, Inc. All rights reserved.

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verizon wireless



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Kansas City MO 64131-3168

8 states.  
One simple rate.  
Superior  
network quality.

Get connected with a SingleRate™ Midwest calling plan.  
Sign up today — call 1.800.2 JOIN IN!

Dear [REDACTED]

We are pleased to inform you about a calling plan designed specifically for the on-the-go business person. Now you can travel throughout eight Midwestern states and have reliable access and crystal clarity in a new, larger calling area.

With the Verizon Wireless SingleRate Midwest calling plan, you can select the monthly rate and minutes package that gives you the best value, starting at just \$40 per month. That's one simple rate that includes 150 anytime minutes and 1000 night and weekend minutes per month! Plus, you'll get free nationwide long distance and free roaming throughout an extended 8-state service area... a plan that adds miles to your range and subtracts dollars from your monthly bill. (See enclosed brochure for map.)

Best of all, you'll know that you can make important business calls when and where you want. That's because Verizon Wireless operates the nation's largest network\*. Verizon Wireless spent \$4 billion in 2000 and plans to spend another \$4 billion in 2001 on network expansion and upgrades to assure you of the most extensive network coverage.

Sign up for our SingleRate Midwest calling plan now through May 31, 2001.

**SingleRate Midwest Plan\***

1150 minutes (150 anytime, 1000 night and weekend)

FREE nationwide long distance

FREE roaming, 8-state area

\$40 per month

\*Other SingleRate Midwest plans available. See brochure

**ADDED BONUS**

**When you sign up by May 31, 2001!**

> 30% off Executive Choice Accessories  
(Minimum purchase of two accessories required)

Call 1.800.2 JOIN IN (1.800.256.4646) and ask for the SingleRate Midwest plan. It's the best value in wireless calling today.

Sincerely,

Harry A. Thomas  
Vice President, Marketing

P.S. Save 30% on your choice of two or more accessories when you sign up for SingleRate Midwest today!

\*NETWORK CLAIM IS BASED UPON INDUSTRY REPORTS OF CARRIER OPERATED COVERED POPULATION

41.

Visit the  
Verizon Wireless  
Store Nearest You  
or Call  
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(1.800.256.4646)  
Today!

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80th Street & State Avenue  
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**LAWRENCE**  
23rd & Iowa  
785-766-0275

**LENEXA**  
95th Street & Quivira  
913-696-5141

**MERRIAM**  
Johnson Drive & I-35  
913-696-5121

**OAK PARK MALL KIOSK**  
1st level, near Dillard's  
913-859-0205

**OLATHE**  
119th Street & Strang Line Road  
913-696-5131

**OVERLAND PARK**  
Two blocks West of Metcalf  
on 119th Street  
913-696-8000

**SHAWNEE**  
Shawnee Mission Parkway & Plumm  
913-248-1988

**TOPEKA**  
Prestige Plaza across from  
West Ridge Mall on Wanamaker  
785-221-2560

**WICHITA EAST**  
Plaza Del Sol  
Woodlawn & Central  
316-619-6020

**WICHITA NORTHWEST**  
West of Ridge Road  
on 21st Street  
316-619-8000

**WICHITA WEST**  
Anna & Kellogg Drive  
Just South of Towne West  
316-619-6010

## MISSOURI

**INDEPENDENCE**  
40 Highway & Noland Road  
816-478-2800

**Independence Center Kiosk**  
Main Entrance  
816-795-7399

**KANSAS CITY NORTH**  
64th Street & I-29  
816-587-9008

**LEE'S SUMMIT**  
291 Highway & Tudor Road  
816-536-5000

**LIBERTY**  
291 Highway & Liberty Drive  
816-560-1002

**ST. JOSEPH**  
Two blocks North of Gene Field Road  
on Bell Highway  
816-390-8700

All stores open Sundays, except St. Joseph location.

Subject to terms of Service Agreement & Price Plans. One-year agreement required. \$50 service activation fee applies to one-year agreement, waived on two-year agreement. Cannot be combined with other offers. CDMA phone required. Usage rounded to next full minute. Unused minutes lost. All calls subject to taxes, toll and other charges. Verizon Wireless Long Distance required. Plan includes free in-state roaming calls through home state coverage area of KS, MO, NE, IA, IL, WI, CO and MN. Charges for long distance calls and calls made while roaming outside home state coverage area may be incurred. Normal airtime charges apply to local and long distance calls. Night & Weekend hours are from 8 am to 8:00 pm weekdays and all weekends. Digital service not available in all areas. New activation required. Service agreement and credit approval required. Early termination fees may apply. See Calling Plan brochures and contract Terms & Conditions for additional details. Limited time offer.

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8 states. One simple rate!

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**SingleRate Midwest Calling Plan**

<b>\$40</b> PER MONTH	<b>150</b> MINUTES
<b>\$50</b> PER MONTH	<b>400</b> MINUTES
<b>\$60</b> PER MONTH	<b>500</b> MINUTES

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nationwide  
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digital phone!

- Tri-mode provides more areas of service
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Let's get something perfectly clear.

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With the new Verizon Wireless  
SingleRate Midwest plan, you'll  
have access to the largest

nationwide network\*, assuring you of crystal clarity on the important calls you make. And we continually monitor, test and upgrade our network components to ensure the highest quality.

**SingleRate Midwest  
makes business a pleasure.**

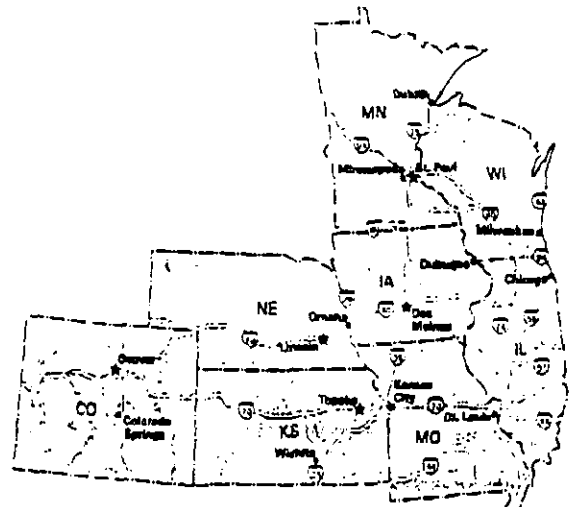
What this means for you is that you can make important business calls where and when you want. Travel throughout eight Midwestern states with **no roaming charges** and **free long distance** to anywhere in the U.S., enjoying the finest digital quality.

All at rates that clearly make it a **sound value for every growing business!**

Sign up by May 31, 2001 and save 30% on two or more Executive Choice Accessories.

Your coverage spans  
8 Midwestern states.

\*Home Rate/Toll-Free Calling Area



This map shows approximate coverage and does not provide a guarantee of service availability. Ability to place or receive calls, including 911 calls, may vary due to weather conditions, terrain, cell site location and electronic interference. Near coverage boundaries, calls may be picked up by another carrier's network, and may incur long distance and/or roaming charges. Service not available in all areas.

\*Network claim is based upon industry reports of carrier-operated covered population.

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**LENEXA**  
96th Street & Quivira  
913-868-6141

**MERRIAM**  
Johnson Drive & I-35  
913-696-6121

**OAK PARK MALL KIOSK**  
1st level, near Dillard's  
913-859-0205

**OLATHE**  
118th Street & Strang Line Road  
913-696-5131

**OVERLAND PARK**  
Two blocks West of Metcalf  
on 119th Street  
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### **SHAWNEE**

Shawnee Mission Parkway  
& Pflumm  
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**TOPEKA**  
Prestige Plaza across from  
West Ridge Mall on Wanamaker  
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**WICHITA EAST**  
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**LEE'S SUMMIT**  
291 Highway & Tudor Road  
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### **LIBERTY**

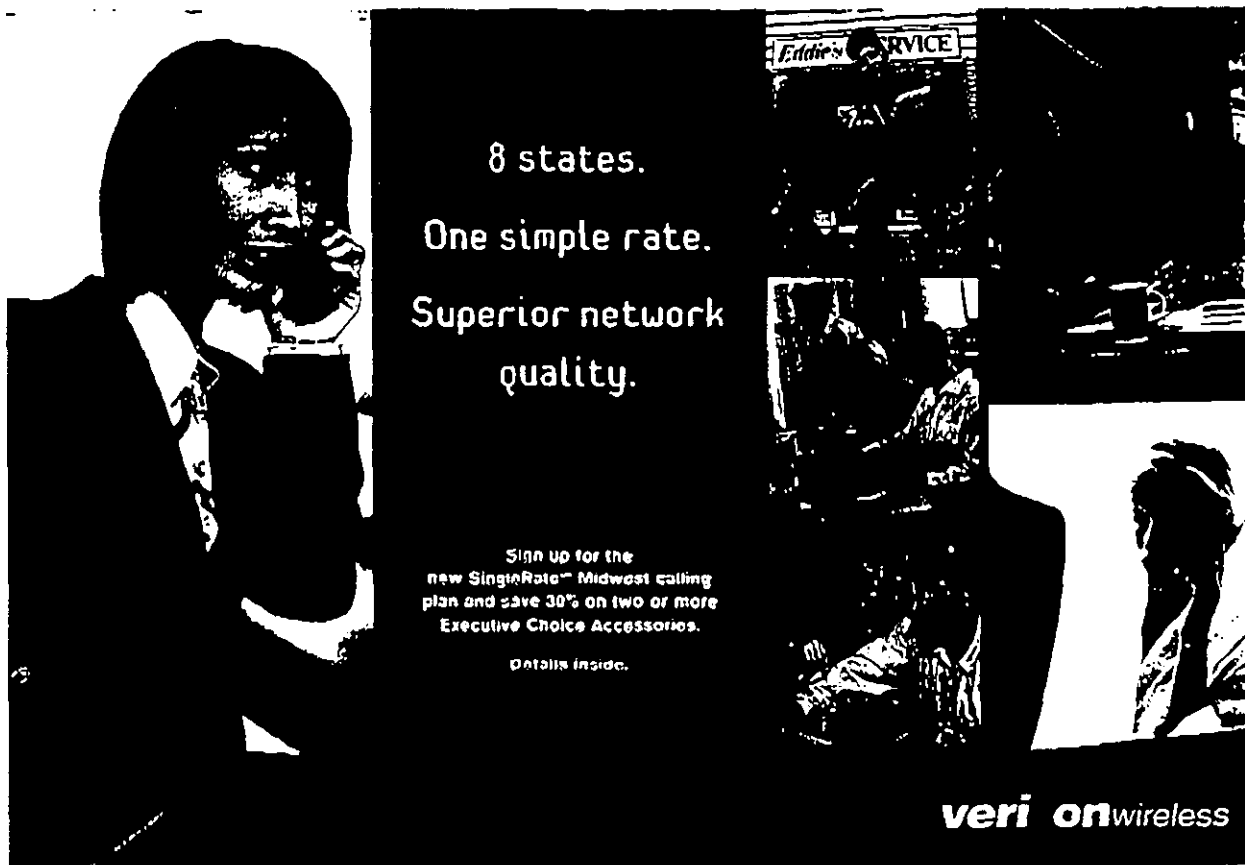
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Two blocks North  
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8 states.  
One simple rate.  
Superior network  
quality.

Sign up for the  
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plan and save 30% on two or more  
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**Your business can count on superior service.**

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We've spent the last 15 years building and improving our network to cover more area, eliminate gaps and deliver crisp quality for every important call you make. In 2000 Verizon Wireless spent \$4 billion and plans to spend another \$4 billion on network expansion and upgrades in 2001 to assure you of the most extensive network coverage.

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We at Verizon Wireless are committed to your complete satisfaction. You have 24 hours a day, 7 days a week wireless access to your account information through our easy-to-navigate automated system. Our helpful Customer Service representatives will take care of any concern you may have the first time you call, with no airtime charges. And if you find your needs have changed, you may switch to another qualifying plan, and even change your phone number, any time you wish.

To sign up for the new SingleRate Midwest calling plan  
**Call 1.800.2 JOIN IN (1.800.256.4646)**

Subject to terms of Service Agreement & Price Plans. One-year agreement required. \$50 service activation fee applies to one-year agreement; waived on two-year agreement. Cannot be combined with other plans. CDMA phone required. Usage rounded up next full minute. Unrated emergency calls. All calls subject to taxes, toll and other charges. Verizon Wireless Long Distance required. Plan includes time in-state roaming calls through home state coverage area of KS, MO, NE, IA, IL, WI, CO and MN. Charges for long distance calls and calls made while roaming outside home state coverage area may be incurred. Roaming airtime charges apply to local and long distance calls. Night & Weekend hours are from 8 pm to 6:30 am weekdays and all weekends. Certain service not available in all areas. New activation required. Service agreement and credit approval required. Early termination fees may apply. See Calling Plan brochure and contract Terms & Conditions for additional details. Limited time offer.

VERIZON WIRELESS 2001

W0004-K3M3

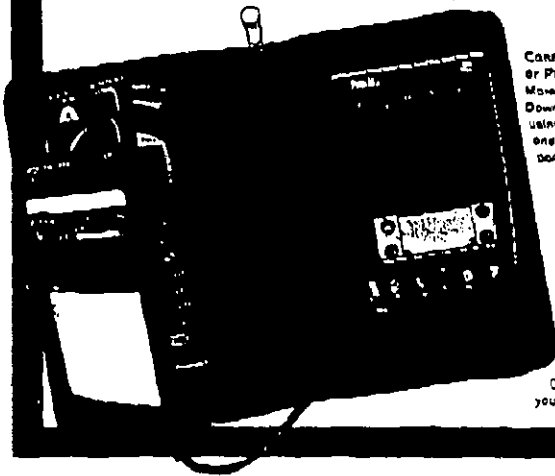
**Join in.**

**verizon**wireless

**Executive Choice Accessories**  
SAVINGS CERTIFICATE

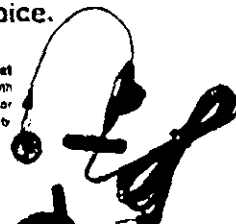
Call toll-free **1.800.2 JOIN IN (1.800.256.4646)**

**SAVE 30% on any two or more accessories of your choice.**

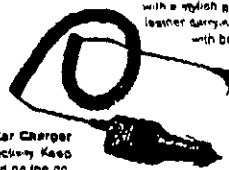


**Connectivity Toolkit for Palm™ III or Palm™ V Handhelds**  
More flexibility, mobility and access to info. Download data and access your e-mail using your Kyocera phone! Carry it all in one case, with an extra zippered pocket and credit card holder.

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Freedom to use both hands during a call for maximum productivity.



**Leather Case**  
Protects your phone with a stylish genuine leather carrying case with belt clip.



**Car Charger**  
Don't lose productivity. Keep your phone charged on the go.



**Belt Clip**  
Special swivel feature for comfort and convenience.

# SERVICETEL SERVICETEL SERVICETEL

IMPORTANT MESSAGE REGARDING YOUR PHONE SERVICE

Sender:	LOCAL WIRELESS SERVICE CENTER LEES SUMMIT, MISSOURI (1-866-240-9641)	Date/time of message origin:	WEDNESDAY/14:23 S.M.T.
Message to be delivered by:	U.S. POSTAL SERVICE	Pages:	1 (ONE)
Recipient:	*****AUTOM 5-DIGIT 64063 040083586 MKD LE 0011571-1-RN [REDACTED] Lees Summit, MO 64063-2647 [REDACTED]	Enclosures:	1 (ONE)
	[REDACTED]	Offer Deadline:	20, JUNE 2001
	[REDACTED]	Toll free number to get free phone/savings:	1-866-240-9641
	[REDACTED]	Notification ID #:	040083586

CONGRATULATIONS, M. J. HUNT:

YOU HAVE BEEN PRE-APPROVED TO RECEIVE A PLATINUM WIRELESS SERVICE PACKAGE FROM WORLDWIDE WIRELESS. THIS PACKAGE INCLUDES A FREE PHONE (YOU PAY JUST SHIPPING AND HANDLING), FREE ACTIVATION, AND EXTRA MINUTES WITH A VALUE OF UP TO \$5,400.

\$5,400 SAVINGS IS NOT A MISPRINT. THIS IS HOW IT WORKS:

AS LONG AS LIMITED QUANTITIES ARE AVAILABLE, YOU CAN GET A MOTOROLA DIGITAL WIRELESS PHONE WITH NUMEROUS BUILT-IN FEATURES, REGULARLY PRICED AT \$135.00 -- YOU HAVE BEEN PRE-APPROVED TO GET IT FOR FREE, WHEN YOU SIGN UP FOR OUR CHOICE 200 DIGITAL PLAN. YOU PAY ONLY \$6.95 FOR SHIPPING AND HANDLING.

WHEN YOU SIGN UP FOR THE CHOICE 200 DIGITAL PLAN, IN ADDITION TO RECEIVING A FREE HIGH QUALITY PHONE AND FREE ACTIVATION, YOU WILL ALSO RECEIVE THE FOLLOWING:

... 1000 FREE WEEKEND MINUTES A MONTH ... LONG DISTANCE FOR JUST 15¢ A MINUTE ... PLUS VOICE MAIL, CALL WAITING AND 3-WAY CALLING.

TO REPEAT: A FREE PHONE, PLUS UP TO 1000 FREE WEEKEND MINUTES A MONTH! AT 45¢ PER MINUTE FOR OFF-PEAK RATES, THAT EQUALS A VALUE OF UP TO \$5,400 IN JUST A YEAR'S TIME! PLUS YOU'LL GET LOW LONG DISTANCE RATES! WE'LL WAIVE THE \$25.00 ACTIVATION FEE, TOO.

TOTAL PACKAGE VALUE/SAVINGS IS EXTRAORDINARY. HOWEVER, DUE TO EXPECTED DEMAND FOR FREE PHONES, WE MUST LIMIT ALL ACTIVATIONS. YOU MUST CALL 1-866-240-9641 WITH YOUR NOTIFICATION NUMBER PRIOR TO JUNE 20, 2001. THERE WILL BE NO EXTENSIONS.

WE'RE PREPARED TO SHIP YOUR FREE MOTOROLA DIGITAL WIRELESS PHONE RIGHT TO YOUR DOORSTEP, PROGRAMMED AND READY TO USE. DON'T DELAY. THIS WILL BE THE ONLY SERVICETEL YOU WILL RECEIVE.

SINCERELY, BRIAN CONNELLY

CALL TODAY TOLL FREE  
1-866-240-9641

<http://wireless.wcom.com/exclusive>

SEE REVERSE SIDE FOR IMPORTANT CONSUMER INFORMATION

(T) or Trans Union

Your name was pre-selected for this offer based on your satisfaction of certain criteria for credit worthiness. If at the time of the offer you no longer meet the criteria, the offer will be revoked. Information contained in your credit report maintained by Trans Union LLC, a consumer reporting agency, was used in connection with this offer. If you prefer that your name be omitted from future offers based on information in your credit report, you may call 1-866-567-8688 or write to Trans Union LLC Marketing Opt Out, P.O. Box 97328, Jackson, MS 39288-7328.

\* Offer requires a new activation on a WorldCom Wireless preferred carrier with a one year service agreement. Plan restrictions, early termination and airtime charges apply. New activation is subject to the availability of a preferred service provider in your area. Phone offered is subject to availability. If the phone is unavailable, a DIFFERENT model MAY be substituted. A delivery charge of \$6.95 per phone will apply. This offer is only available through the toll-free number listed. Should a preferred service provider not be available in your area at the time of the offer, you may be recontacted within 60 days if a provider becomes available. WorldCom reserves the right to revisit the original criteria met for credit worthiness prior to recontacting you. Offer expires 6/20/01.

\*\* Offer applies to long distance calls from your home calling area. Does not include directory assistance or local toll calls. Airtime charges apply. Free minutes cannot be carried over to the next month.

YOU HAVE BEEN  
PRE-APPROVED FOR  
OUR PLATINUM  
PACKAGE WHICH  
INCLUDES ...

## A FREE PHONE

(PAY JUST SHIPPING & HANDLING)  
PLUS UP TO 14,400  
MINUTES FOR AN  
ENTIRE YEAR!

A VALUE OF  
UP TO  
**\$5,400**



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**CALL: 1-866-240-9641**  
<http://wireless.wcom.com/exclusive>

Sign up now and get a **FREE PHONE**  
plus thousands of **FREE minutes...**

... DEPENDING ON YOUR  
USAGE, YOU COULD  
SAVE THOUSANDS OF  
DOLLARS!

**1000 FREE WEEKEND MINUTES A  
MONTH**

At 45¢ per minute for off-peak rates,  
that's a value of up to \$5,400!



**PLUS! LOW LONG  
DISTANCE RATES**  
Coast-to-coast  
savings - anytime,  
any day, seven  
days a week!

**BONUS!**

Respond before June 20th  
and the \$25.00 Activation  
Fee is waived!

\* one year service agreement required.  
SEE ENCLOSED LETTER FOR DETAILS  
\*\* Offer applies to long distance calls from your  
home calling area. Does not include directory  
assistance or local toll calls. Airtime charges apply.  
Free weekend minutes cannot be carried over to  
the next month.



### **FREE Motorola Digital Phone**

- Comes Complete With Battery And Charger
  - One Year Limited Warranty
  - Up to 100 Minutes of Battery Talk Time
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  - Unanswered Call Indicator
  - Last Number Recall
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  - Large Graphic Display
- And Much More!

**CALL TOLL-FREE 1-866-240-9641 BEFORE THE DEADLINE**

Platinum service in  
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**FREE PHONE** includes  
these calling features...  
**at no extra cost!**

**Voice Mail**

means you'll never miss another  
important message.

**Call Waiting**

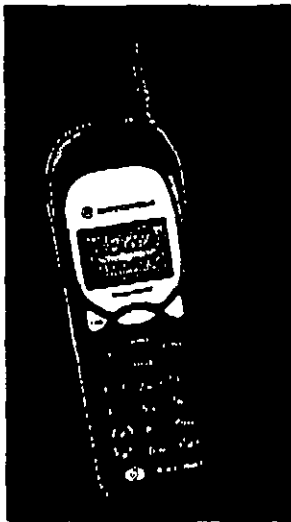
means you'll never miss another  
important call.

**3-Way Calling**

allows you to add another party to  
an existing conversation.

MAY 23 2001





**WORLD COM**  
wireless.

**Choice 200 Digital Plan Includes:**

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- **FREE** Motorola digital wireless phone, a \$135.00 value. You pay just \$6.95 shipping and handling.
- **1000 FREE** Weekend Minutes a Month
- **Low Long Distance Rates.**
- FREE Activation**
- Voice Mail
- Call Waiting
- 3-Way Calling
- And much more!

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[wireless.wcom.com/exclusive](http://wireless.wcom.com/exclusive)



MISSOURI FREE PHONE/FREE ACTIVATION	
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<p>Free Phone/Platinum Savings Reserved For:</p> <p>██████████ ██████████ Leas Summit, MO 64063-2647</p>	<p>This certificate is non-transferable and may not be redeemed for cash or credit. Requires a new activation and one year of service with WorldCom Wireless. NO SIGNATURE REQUIRED. NO LENGTHY PAPERWORK TO FILL OUT.</p> <p>Free Phone Offer Expires: 08/20/01</p>
<p>CALL TOLL FREE 1-888-240-9641 PLATINUM ID# 040083699</p>	<p><b>WORLD COM</b> wireless.</p> <p><i>Platinum</i></p>

CINGULAR WIRELESS ERICSSON MOTOROLA NOKIA CINGULAR WIRELESS ERICSSON MOTOROLA NOKIA CINGULAR WIRELESS

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# **cingular**<sup>SM</sup> WIRELESS

FORMERLY SOUTHWESTERN BELL WIRELESS

# FREE!

ERICSSON  1228 DIGITAL PHONE

**PLUS!**

## 1000 WEEKEND MINUTES!

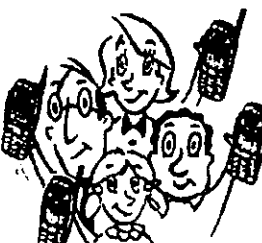
- Unlimited Mobile-To-Mobile
- FREE Long Distance from home calling area

**Hurry!**  
Offer Ends 1/31/01!

### FAMILY TALK<sup>SM</sup>

Only **\$19<sup>95</sup>** per month

- Share Minutes Between Lines
- Up To Four Additional Lines per family or business—only \$10 per line, per month!





**GRAND OPENING SPECIAL**

-  **FREE Hands Free Head Set**
-  **FREE Car Charger/Adapter**
-  **FREE Leather Phone Case**

Valid on any new activation at store locations listed in this ad.

## ★ ★ ★ ★ ★ GRAND OPENING! ★ ★ ★ ★ ★

**NOKIA 5125 \$19<sup>95</sup>**



**NOW OPEN! HOURS:** Mon-Fri 10-8 Saturday 10-6 Sunday 12-6

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Limited-time offer. Offer is only good with the current promotion and cannot be combined with any other offer. Family Talk requires a two-year service agreement on select rate plans. Family Talk minutes can be shared on up to five phones. The primary line must remain active for the duration of the commitment. Changing or discontinuing the rate plan on the primary account may void the Family Talk service and result in standard early termination penalties. A one-time activation fee applies for all phones. Included minutes in the primary rate plan are shared. Phone-to-Phone service is operational only in the Cingular Wireless local calling area and only applies to calls made to and from other local Cingular Wireless Phones. Weekend calling is valid from your home coverage area between 12:00 a.m. Saturday and 11:59 Sunday. Unlimited long distance applies only to calls from the home coverage area to U.S. destinations. Included minutes will be used when making long-distance calls from the home coverage area. When packaged minutes are used, all calls billed at applicable airtime rates. Airtime and other measured usage are rounded up to the next full minute at the end of each call for billing purposes. Unused minutes do not roll over to the next month. Other restrictions and charges apply. See store representative for details. Taxes, surcharges and other governmental fees apply. Equipment type, price and availability may vary by location. Offer subject to credit approval; deposit may be required. Other conditions apply. Affordable Portables is not responsible for omissions or typographical errors. New ad supersedes previous ad.

"Having been born and raised in the area, I'm especially proud that Charter Communications is leading the way in new technology and providing choices and opportunities for St. Louis residents."

*- Jerry Kent, President and CEO  
Charter Communications*

# Just imagine new choices for St. Louis

Charter Communications is investing \$210 million in the St. Louis area: bringing new technology to local schools, creating good paying jobs and giving area residents access to a whole new set of communication choices.

## **Internet over your TV**

*You don't even need a computer*

## **High-speed Cable Internet**

*Won't tie-up your phone line*

## **A Choice in Local Phone Service**

*Lower prices and better service*

## **Better Cable TV**

*More channels and more choices*

## **High-tech Schools**

*A free high-speed Internet connection and free non-commercial cable TV for public and private schools in the St. Louis area*

## **New Investment and Good Jobs**

*A commitment to bringing good paying jobs to the St. Louis area*

Charter Communications is the hometown St. Louis company that's righting to give consumers a choice. While other companies have left St. Louis, Charter has lived up to its promise to keep its headquarters here. Charter's \$210 million local investment ensures that St. Louis residents will benefit with new technology and more choices.



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**FITE**

**Schedule 9**

## The Barriers to Landline Displacement

### Executive Summary

*When cellular phones first debuted in the consumer market in 1994, the notion that wireless devices would someday compete with landline communications was considered extremely far-fetched. Poor network quality, size, cost, and a variety of other factors greatly inhibited high usage rates, and wireless phones were seen as a luxury good—only affordable by a few and not worth the cost to those with scarce amounts of discretionary income.*

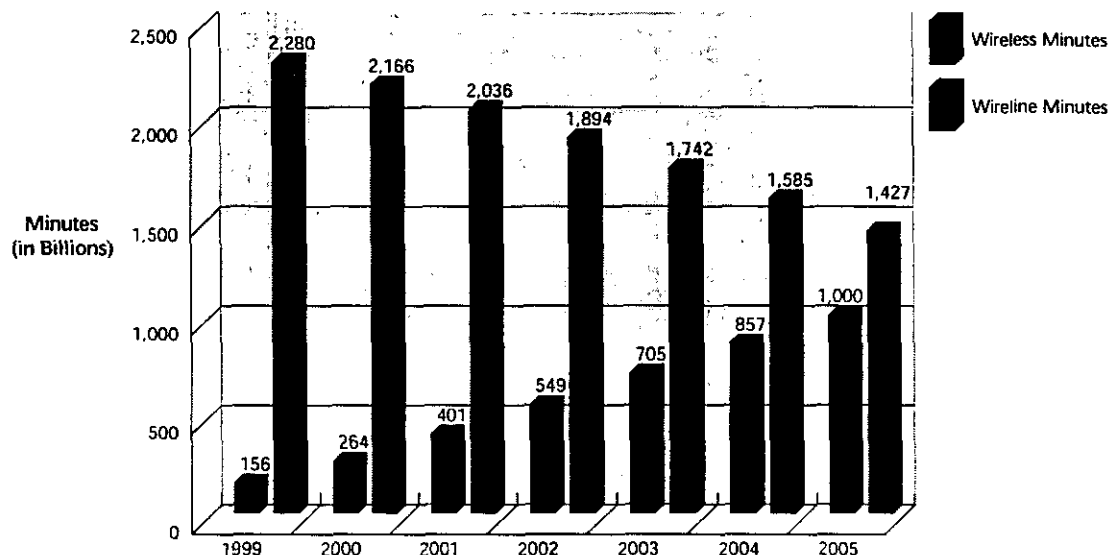
*Almost seven years later, the cellular phone industry has progressed much further than ever imagined. In the United States penetration levels have reached 36%, and in several European countries penetration has exceeded 60%. The rise in digital penetration has improved the clarity and capacity of cellular communications. Increased competition, continual building out of networks, and larger coverage areas have driven down the cost of wireless service while increasing the convenience of using cellular phones. In addition, carriers have begun offering innovative plans and programs to increase consumer usage.*

*Yet the question remains: Despite the hype and popularity, is wireless usage actually displacing wireline usage? Are people really using their wireless phones as their only phones? Will wireless one day overtake wireline as the communications medium of choice in the United States?*

### Exhibit 1

#### Wireless Displacement of Wireline Minutes of Use

Source: the Yankee Group, 2000



Copyright 2000, the Yankee Group

*In looking at the statistics, contradictions abound that make the answers to these questions even more complex. According to the Yankee Group's 2000 Mobile User Survey, approximately 3.0% of users claim their wireless phone is their only phone, and 0.3% use their wireless phone exactly like a wireline phone. The Yankee Group predicts that the wireless percentage of total conversation minutes of use (MOU) will increase from 6.5% to 41.0% between 1999 and 2005 (see Exhibit 1). Additionally, subscribers predict that they will use their wireless phones more frequently and expect increased displacement of their wireline usage.*

*Despite these encouraging trends, the number of subscribers that use their wireless phone as their only phone has not increased significantly during the past couple of years. Consumers are still very compelled to maintain wireline access for several reasons, and carriers still have progress to make in many areas before cell phones can become the device of choice by all consumers.*

*In this Report, the Yankee Group more closely examines the trends in landline displacement. We talk about the progress made in wireless communications during the past couple of years and look at what still needs to be done to make wireless a truly viable form of communication in all situations. Lastly, we discuss what the carriers can do to make customers more comfortable using their wireless phone as their only phone—thus accelerating the process of landline displacement.*

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### I. What Is Landline Displacement?

A couple of definitions must be addressed when discussing landline displacement. The first is the quintessential definition of landline displacement, which is replacement of minutes of use over the wireline network with minutes over the wireless network. Specifically, landline displacement occurs when a user chooses to use the wireless network for a voice or data transaction that previously would have been made on the wireline network. As seen in Exhibit 1, the Yankee Group expects landline displacement of voice minutes in the United States to grow substantially over the next five years, potentially accounting for 41% of all voice minutes by the year 2005.

The second area we address when discussing landline displacement is actual "landline displacers." These are wireless subscribers that choose to use their wireless phone as their only phone, or at least use their wireless phone to replace either their home or office line, if not both. According to our 2000 Mobile User Survey, approximately 3% of all wireless users use their wireless phone as their only phone. Of those users, around 0.3% use their wireless phone exactly like their wireline phone (which means they leave the wireless phone in their home and use it as they would a normal wireline phone).

## What Are Subscribers' Thoughts about Landline Displacement?

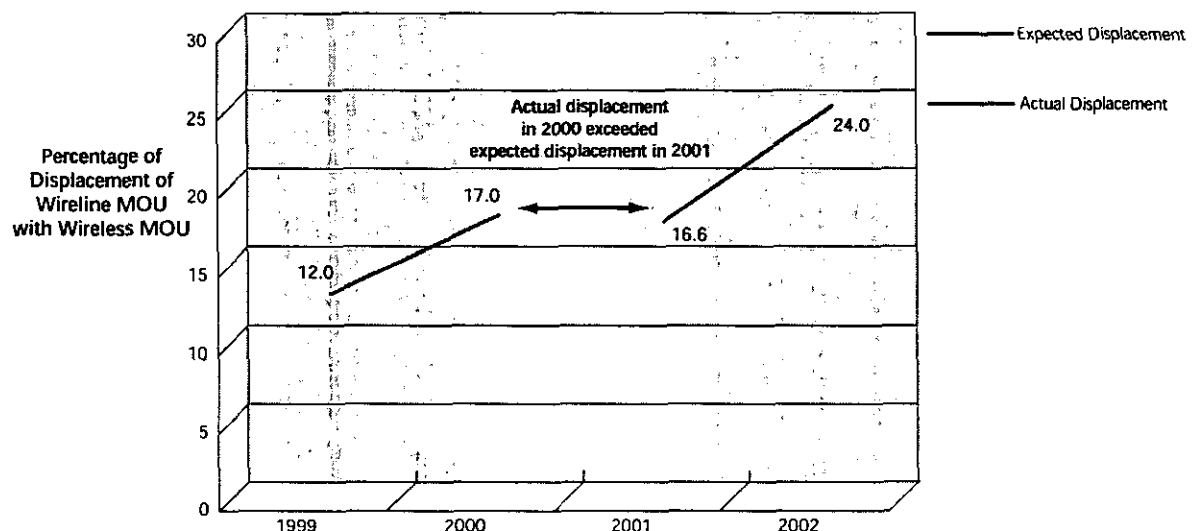
The Yankee Group has found several interesting trends related to landline displacement. The first is the current and expected displacement estimated by subscribers. According to our Mobile User Survey, in 1999 subscribers were displacing about 12% of their wireline minutes with wireless and they expected to displace 16.6% of minutes by 2001. In our 2000 survey, customers indicated that they were already displacing 17% of minutes and expect to displace 24% of minutes by 2002 (see Exhibit 2). We see this as a very encouraging sign that subscribers are increasingly open to using their wireless phone as a replacement for wireline in certain instances.

## Where Do Customers Use Their Wireless Phone?

The Yankee Group believes that a lot can be deduced about landline displacement by determining where customers will use their phone. We have discovered that the majority of wireless usage currently takes place in a user's car or other mode of transportation (61%), leading us to believe that a good amount of those minutes are still complementary to wireline usage. Subscribers using their phone in a stationary environment are much more likely to be replacing landline minutes. It is important to note that the percentage of use in cars or other modes of transportation has decreased from 70% in 1998 to 61% in 2000, while usage in the home has doubled from 6% in 1998 to 12% in 2000 (see Exhibit 3). As places of wireless phone usage begin to disperse, we believe this is an indication that customers are becoming more comfortable using their phone in varying settings, leading down the path toward landline displacement.

**Exhibit 2**  
**Subscriber Actual vs. Expected Displacement**

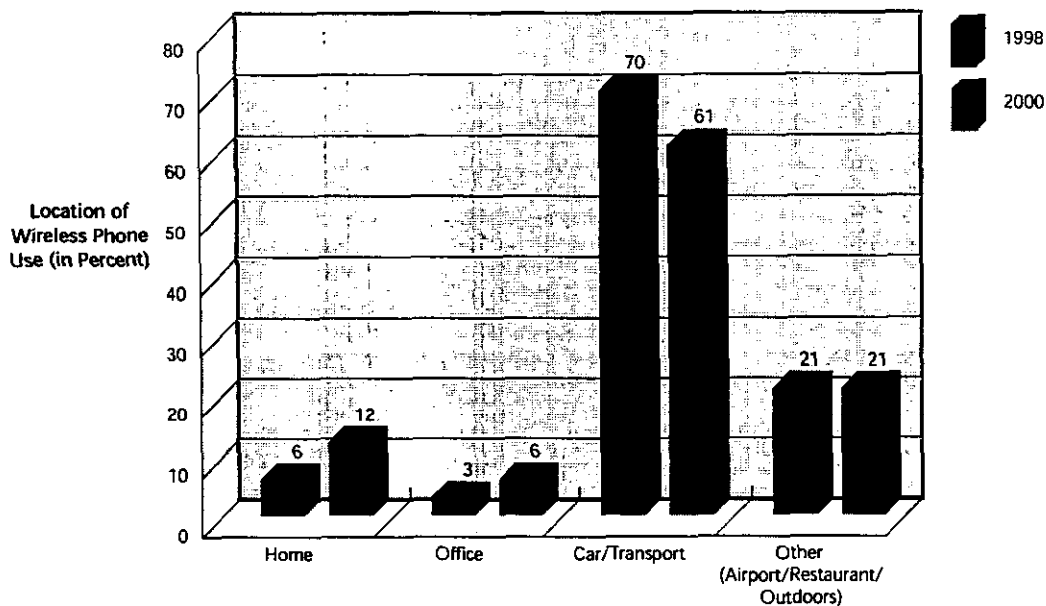
Source: the Yankee Group, 2000



## Exhibit 3

## Customer Wireless Phone Usage Patterns

Source: the Yankee Group, 2000



## Cellular vs. PCS Displacement

A third interesting trend the Yankee Group has discovered is that more displacement occurs among PCS users than cellular: 4% of PCS users and 2% of cellular users consider their wireless phone their only phone (see Exhibit 4). We believe this is because of the large percentage (46%) of cellular users that are still on analog phones and do not have access to advanced features such as text messaging, voice mail, and call waiting that digital phones provide. In addition, PCS users tend to have more advanced handsets and more all-inclusive rate plans.

## II. Factors Stimulating Wireline Displacement

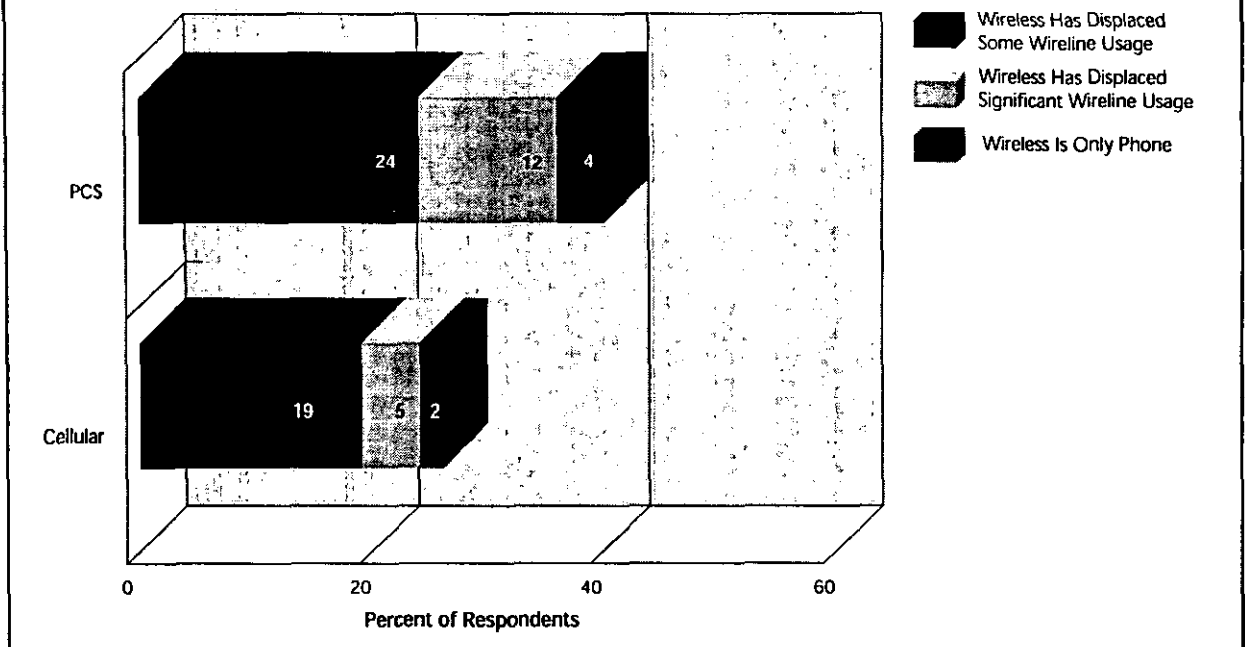
The Yankee Group has identified several factors that are responsible for stimulating wireless growth in the United States. These include:

- **Added Competition**—In a few cities across the nation, as many as seven carriers can be found competing in one market. The Yankee Group believes that the increased competition has been a stimulant to the industry—increasing consumer product awareness and expanding the overall wireless pie.
- **Larger Coverage Areas**—As the industry consolidates and several national players emerge, carriers are leveraging their subscriber bases across greater coverage areas and are continuing to build out national networks. This again has led to greater availability of wireless services in a greater number of markets.
- **One Rate and Family Plans**—Carriers are beginning to aggressively offer a number of plans that encourage increased usage by providing greater service benefits without directly decreasing the cost of wireless service.



## Exhibit 4 Cellular and PCS Usage Patterns

Source: the Yankee Group, 2000



- **Creative Marketing and Packaging**—The carriers have come up with several creative marketing initiatives that we believe will encourage increased wireless usage, thus leading the industry closer to landline displacement. These initiatives include:
  - **Rollover Plans**—These plans allow customers to carry unused minutes over to the next month. The plans focus on customer retention since customers are less likely to churn when they will be losing unused minutes.
  - **Family/Group Plans**—These plans allow families or groups to share minutes. The plans increase customer stickiness because churning becomes a group decision, which is more difficult to make.
  - **“One-Number Service” Offerings**—These offerings allow subscribers to use the same phone number for both a home and office line.
  - **One-Stop Shopping**—Certain carriers are bundling local, long-distance, wireless, paging, and Internet services in certain markets.

The above factors have had several effects on the wireless services industry, including:

- **Lower Cost to Carriers**—As the technology continues to improve and becomes more pervasive, carriers have been able to spread their costs over an ever-increasing subscriber base—especially general and administrative expenses and handset subsidies. Thus, the cost incurred by the carriers to provide service has declined.

- **Lower Pricing**—As carriers expand their coverage and capacity and reach a larger subscriber base, they are able to operate at a lower cost per subscriber. The Yankee Group's pricing analysis indicates that the real price per minute for customers has fallen as their usage has risen. In 1998, customers paid \$0.31 for a minute of wireless use; today the average user is paying \$0.24. Displacement occurs as wireless services become more affordable.
- **Increased Penetration**—Penetration levels in the United States will be approximately 38% by year-end 2000, up from less than 20% at the end of 1997, and are expected to reach 62% by 2005. As cellular phones become more prevalent, the Yankee Group predicts that wireless penetration will reach 72% by 2009.
- **Increased Digital Usage**—Digital prices have fallen 77% between 1998 and this year. At the same time, digital penetration has increased from 21% of subscribers in 1998 to about 52% currently. The Yankee Group believes there is a strong correlation between increased usage and digital penetration. Digital coverage is much clearer than analog and enables features such as call waiting, caller ID, and voice mail, which make wireless phone usage much more preferable and similar to a landline call.
- **Growth of Prepaid**—As wireless penetration increases, carriers have begun exhausting their traditional subscriber bases. They are now looking for alternative market segments, particularly the credit-challenged. Currently, the prepaid market has about 6 million subscribers in the United States, up from 2 million in 1998, and we expect this number to more than double to 14 million by the end of 2002. Prepaid is important when considering landline displacement because it allows carriers to encompass a broader range of customers who may not qualify or desire postpaid plans.

In addition to the above factors, the Yankee Group acknowledges that as wireless phones become more pervasive and an increasingly mainstream item, it is logical to assume they will continue taking away from landline MOU.

## Innovative Strategies to Stimulate Landline Displacement

Recently, the Yankee Group has begun witnessing new carriers employing strategies to stimulate landline displacement. For example, Leap Wireless has rolled out an unlimited usage local calling strategy for \$30 per month. Leap's service is, in many ways, considered a landline displacement product as most of the company's subscribers are utilizing in excess of 1,200 MOU per month. Other established carriers, such as ALLTEL, are employing this strategy in various markets. ALLTEL has rolled out two products aimed at the local, all-inclusive user: MetroTalk and Boomerang. MetroTalk is sold as a subsidiary of ALLTEL, leveraging its brand name. Boomerang operates as a completely independent subsidiary of ALLTEL. Both products compete with landline carriers by offering unlimited local calling for a low flat rate.

### III. Wireline/Wireless Premiums

Is there a specific price inflection point at which wireless phones become far more likely to displace landline phones? The Yankee Group does not believe that price is the only factor considered when a subscriber chooses to use a wireless phone over a wireline phone. However, we do believe that in many instances there is a strong correlation between premium price of wireless services over wireline and the potential rate of displacement. We theorize that, in a particular market, if wireless prices are less than three times more expensive than wireline, the region will begin to see aggressive displacement.

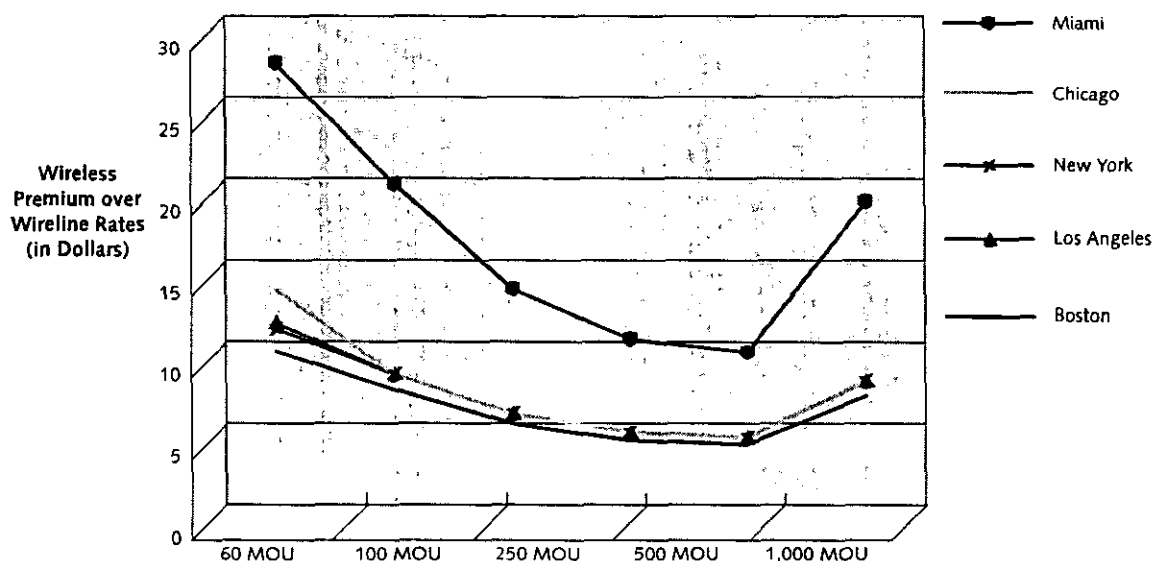
Currently, wireless prices in North America are still, on average, four or five times higher than wireline rates; therefore, aggressive displacement in the United States is still a few years off. However, as you can see in Exhibit 5, as customers begin approaching usage levels of 500 and 1,000 wireless minutes per month, the cost barriers to wireline displacement become less significant.

### IV. Global Landline Displacement

Internationally, we recognize that there may be other compelling reasons for subscribers to displace their landline phone. For instance, in parts of some countries, wireless phones are the only option for telephone services. Thus, subscribers are willing to pay for any accessible services and wireline premiums are less significant.

**Exhibit 5**  
**Wireless Premium over Wireline Rates**

*Source: the Yankee Group, 2000*



In fact, global penetration is growing at a faster clip than U.S. penetration, and the rate of new wireless subscriptions is largely outpacing the rate of new wireline access lines being installed. Globally, there were approximately double the number of landline access lines as wireless subscribers in 1998. The Yankee Group predicts that wireless subscriber numbers will converge with those of land access lines in 2005 and overtake land access lines by 2006 (see Exhibit 6).

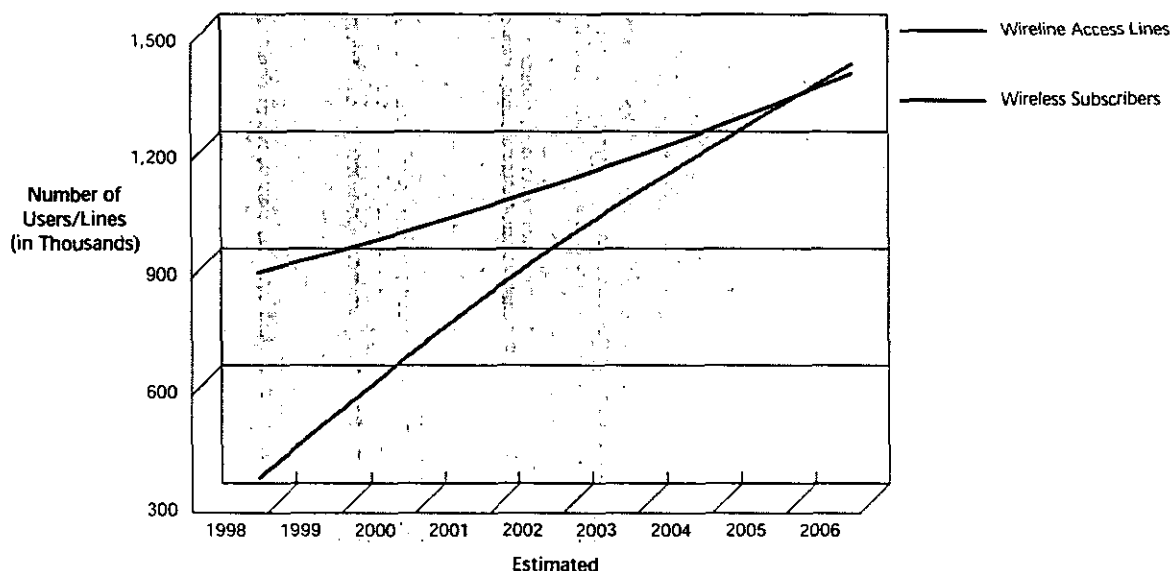
## V. Obstacles to Landline Displacement

There are still several obstacles facing landline displacement in the United States, including:

- **The Absence of Calling Party Pays**—Wireless customers in the United States must pay for both incoming and outgoing calls. On the U.S. wireline network and on wireless networks in most other countries, customers don't have to pay for incoming calls. Therefore, cellular phones are not feasible as a customer's only phone because customers are hesitant to give out their wireless phone number. According to the Yankee Group's 1999 Mobile User Survey, 19% of users still do not give out their wireless number. The Yankee Group does not expect the issue of calling party pays to be resolved at any time in the near future.
- **Excellent Wireline Service in the United States**—The United States has an excellent wireline network, which reaches 99% of the U.S. population and has less than a 0.01% dropped call rate. Wireless service cannot compete with these standards, which U.S. customers are accustomed to and expect.

**Exhibit 6**  
**Global Wireless Subscribers vs. Global Access Lines**

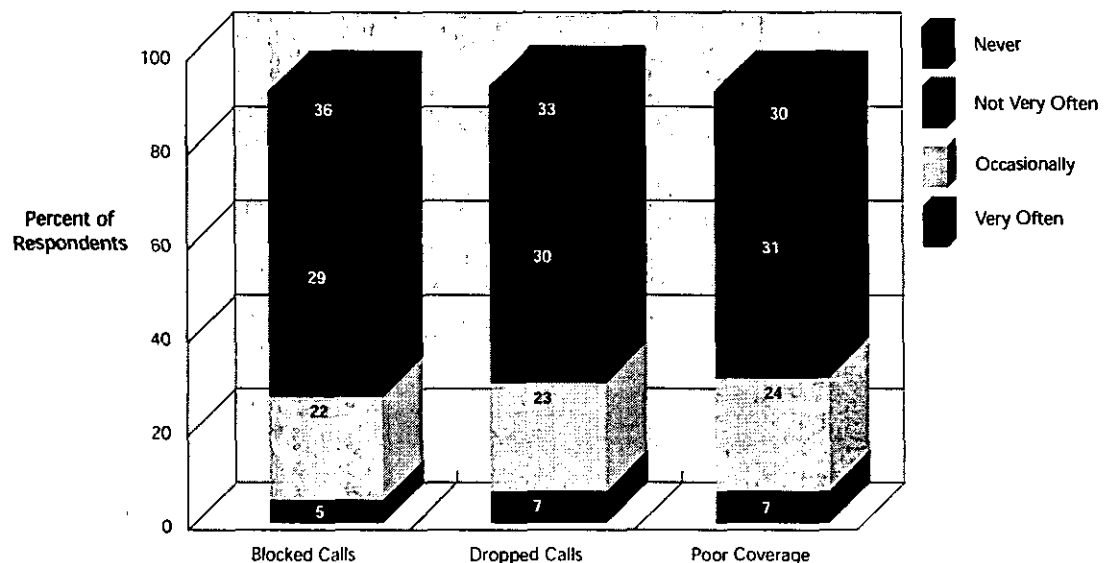
Source: the Yankee Group, 2000



- **Lower Penetration of Prepaid Users**—Carriers have just begun to target the prepaid market. The Yankee Group believes that prepaid would attract a largely untapped user base, specifically the youth market and the credit-challenged.
- **Wireless Network Shortcomings**—Network shortcomings such as dropped calls, network glitches, and rampant busy signals are still a problem on the wireless network. This also ties into the excellent wireline service; U.S. subscribers have high expectations for their phone service, especially in terms of reliability and clarity. As seen in Exhibit 7, subscribers experience these wireless network shortcomings approximately 30% of the time.
- **Battery Life**—Cellular phone battery life, while improving, is still not at the levels needed for landline displacement. Most phones do not offer more than 6 hours of talk time and 24 hours of standby time.
- **Landline Is Location-Specific; Wireless Is Person-Specific**—Americans are accustomed to associating a phone with a place; for instance, calling an office or a household. For subscribers to use their wireless phone as their only phone, somewhat of a paradigm shift must take place in the way people think about phones—associating phone numbers with a person instead of a place.
- **In-Building Penetration Is Still Not Very Reliable**—Until in-building penetration becomes more reliable, subscribers will typically have no compelling reason to use a wireless phone while inside. Carriers that operate at lower-bandwidth frequencies will have more success in combating this problem.
- **Health Concerns**—Many users consider possible radiation effects a big obstacle when thinking about using their wireless phone 100% of the time.

### Exhibit 7 Wireless Network Satisfaction

Source: the Yankee Group, 2000



Note: Totals do not equal 100% due to respondent errors.

In addition to the above concerns, the Yankee Group believes that for the foreseeable future, consumers will most likely maintain at least one landline access line in their home for the following reasons:

- **Internet Access**—Wireless access to the Internet is not nearly at the speeds that wireline dial-up access can achieve. Wireless modems, in most cases, do not achieve more than 14.4 Kbps, whereas dial-up wireline modems can easily achieve at least 56 Kbps. So, for data access, customers will certainly continue using wireline access for the foreseeable future.
- **Emergency Usage**—Customers feel more comfortable relying on a wireline phone for emergency situations. Therefore, households—especially those with children—tend to keep a wireline phone for these reasons.
- **A “Family Number”**—As mentioned earlier, U.S. subscribers are accustomed to the notion that a phone is place-specific as opposed to person-specific. Following that logic, Americans like the idea of having one number that reaches their home as opposed to a specific person within the household. In addition, families with young children maintain a landline phone for their children’s use.
- **Directory Assistance**—Wireless phones are not listed in directory assistance, which can make it difficult to reach a user whose wireless phone is their only phone. (On the upside, telemarketers do not have access to cellphone numbers.)

## VI. What Can Carriers Do to Accelerate the Landline Displacement Process?

So the real questions remain: What can wireless carriers do to accelerate the process of landline displacement? And, are carriers really willing to take the necessary steps to encourage this trend, when, in many instances, they are risking the cannibalization of their own wireline networks?

The Yankee Group believes that carriers will continue to be interested in driving landline displacement because wireless phones are much more accessible than landline phones, and thus drive higher overall usage rates. However, in order to drive this phenomenon, carriers must become more aggressive. First, wireless carriers can directly target landline usage by continuing to offer aggressive all-inclusive price plans for local, long distance, and roaming. In addition, carriers can offer incentives to increase inbound traffic by restructuring pricing. Offers such as giving the first two incoming minutes free will encourage increased usage by subscribers. Carriers can also continue to enhance their value-added services such as wireless data, short messaging, and personal calendar functions. These value-added services increase a subscriber’s dependence on his or her cellular phone; thus, the more tied a subscriber is, the more he or she will use the phone.

On the technology side, carriers can work with handset manufacturers and infrastructure vendors to make cellular phones more practical as an “only phone.” Suggestions include improving signal quality, voice quality, and coverage with available technology. Carriers can also operate at lower-bandwidth frequencies in heavily populated urban areas. This will help them provide better in-building penetration to their customers.

Finally, carriers can begin to focus more on those users that have more potential to become landline displacers—specifically, young professionals and teens. Young adults and teens do not possess the emotional ties to their landline phones and are much more technologically savvy. Thus, the Yankee Group thinks these generations will become the true pioneers of wireline displacement.

## VII. Conclusion

The Yankee Group believes that it is only a matter of time before wireline phones go the way of the old-fashioned rotaries and wireless phone usage will be ubiquitous. However, this is still several years off. In the meantime, carriers must work to offer a product that is competitive with landline usage and provide compelling incentives for customers to give up their trusty old wireline.

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## Further Reading

“Will Wireless Carriers Have Success with Generation Y-erless?,” *Yankee Group Report, Wireless/Mobile Services*, Vol. 1, No. 15, October 2000.

“Wireless Coverage in the United States: Leaving a Lot to Be Desired,” *Yankee Group Report, Wireless/Mobile Services*, Vol. 1, No. 11, July 2000.

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**FITE**

**Schedule 10**

## Bulletin

### Replacing Landline with Wireless: How Far Can It Go?

*Analyst: Callie Nelsen*

#### IDC Opinion

*How much traffic is moving from landline to wireless?*

Although this is a hard question to answer, one can look at the growth in minutes of use (MOUs) of both landline and wireless and see that some traffic is definitely moving to wireless. In addition, from end-user reports, we know that wireless is stealing some traffic from landline. In fact, in a survey of 900 households that have wireless phone users, 36.4% reported using their wireless phones at home and 26.2% reported using their wireless phones at work. Just over 12% of households also reported making their most recent wireless phone purchases instead of installing additional landlines.

#### Overview

By 2004, approximately 92% of wireless users will be using their wireless phones when they could be using wired ones. They are using their wireless phones as their primary phones, have purchased wireless phones instead of additional landlines, or are simply transferring some of their minutes of use (MOUs) from landline to wireless.

Schedule 10

This bulletin presents survey data that shows end-user trends in landline replacement. Forecasts of MOUs split by wireless versus landline, voice versus data, and business versus consumer are provided. IDC also forecasts the percentage of wireless subscribers who will replace landline with wireless.

### Definitions

- **Minutes of use (MOUs).** This term can describe wireless use, landline use, or total telecom use (both landline and wireless use together).
- **Landline replacers.** This term refers to wireless users who replace wireline use (MOUs) with wireless. There are three types of replacers: those who completely replace landline phones with wireless and use the wireless as their primary phones (called *complete landline replacers*), those who purchase wireless phones instead of additional landline phones, and those who migrate some of their landline MOUs to their wireless phones.

### Personal Wireless Communications User Survey Findings

In January 2000, IDC conducted a telephone survey of 900 U.S. households with wireless users. Respondents were asked a number of questions about their current use patterns.

One question asked about the percentage of calls made at home and at work. Figure 1 shows the results of this question from the *Personal Wireless Communications User Survey, 2000* (IDC #22094, April 2000). For purposes of comparison, these percentages are also shown for the 1996 through 1999 surveys.

The percentage of users who use their wireless phones at home has continuously increased since 1996 — nearly three times over, from 12.4% to 36.4%. The percentage of users who use their wireless phones at work has also increased over three times over since 1996, from 8.0% to 26.2%.

Because the survey was a telephone survey, all the respondents had home phone lines. IDC also assumed that a vast majority, if not all, of the respondents who were employed also had work phones. Therefore, respondents who said that they made at least 1% of their wireless calls either at home or at work were asked what percentage of all their calls at these locations were made on their wireless phones. Over one-third of respondents said that they used their wireless phones at home. These respondents made an average of 18.5% of all their calls made from home on their wireless phones. Over one-quarter of respondents

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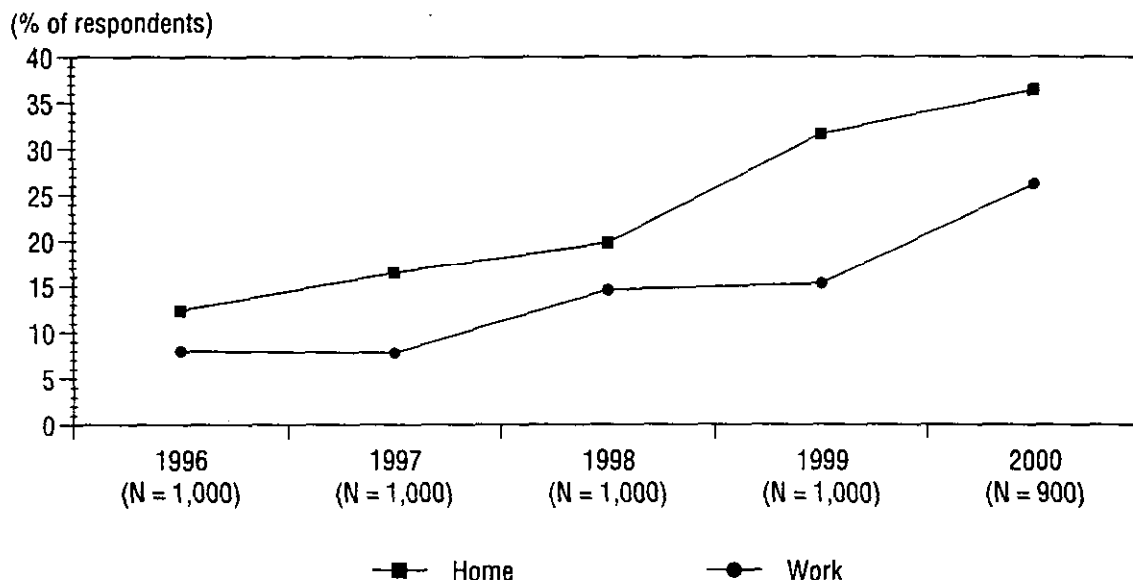
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said that they used their wireless phones for over 35.0% of all their calls made at work (see Figure 2). In fact, 14.0% of them made and received 100% of their calls at work on their wireless phones.

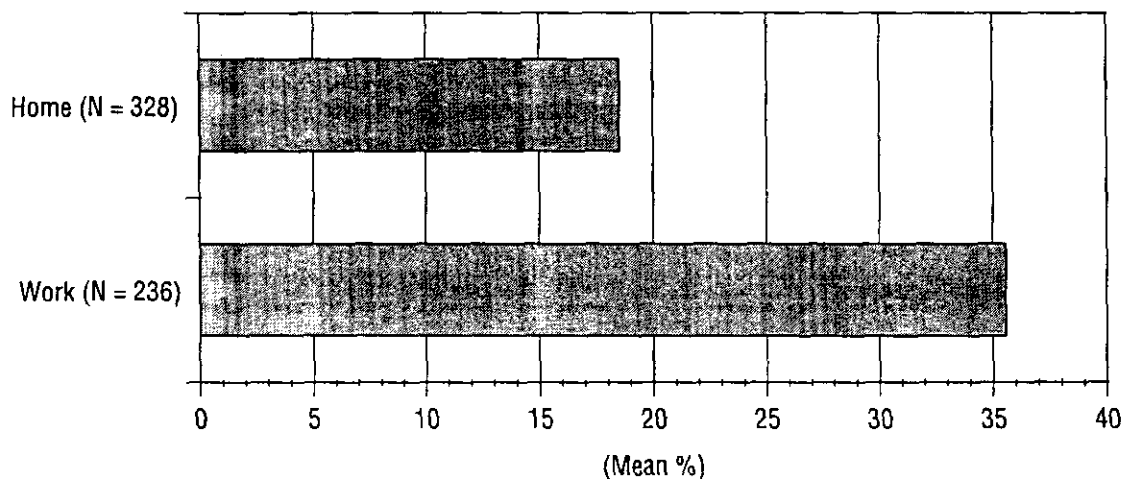
**Figure 1**  
**U.S. Respondents Who Make Wireless Calls from Home and Work, 1996–2000**



Source: IDC's *Personal Wireless Communications User Survey*, 1996–2000

**Figure 2**  
**U.S. Cellular/PCS Phone Use by Location**

Q. What percentage of all the calls you make and receive at home or work during a typical week are on your cellular or personal communications service (PCS) phone?

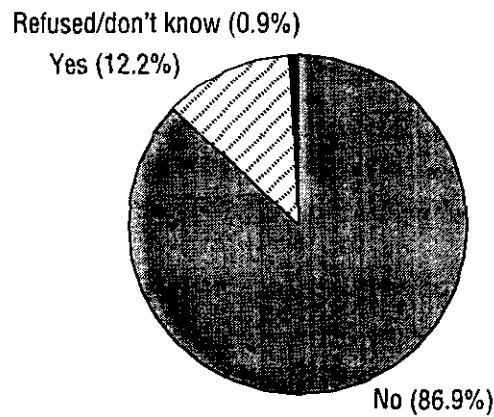


N = Respondents who reported making 1% or more of wireless calls at home or work.  
Source: IDC's *Personal Wireless Communications User Survey*, 2000

In addition to users who replace some landline MOUs with wireless, there is also the segment of landline replacers who have purchased wireless phones instead of installing additional landlines at home. Figure 3 shows the results of the question about purchasing wireless instead of purchasing an additional landline. Over 12% of respondents had a positive response to this question.

**Figure 3**  
**U.S. Cellular or PCS Phones Purchased to Forego Installing Additional Landlines**

*Q. Was your most recent cellular or PCS phone purchased instead of installing an additional phone line?*



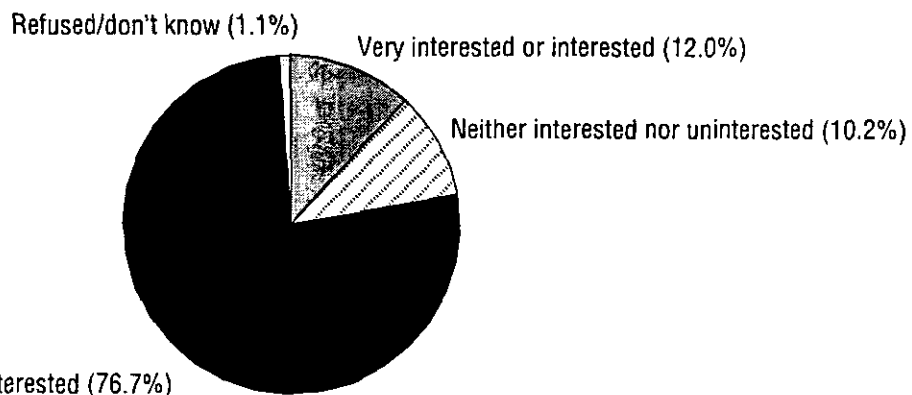
N = 900

Source: IDC's *Personal Wireless Communications User Survey*, 2000

Figure 4 shows respondents' interest in completely replacing their home phones with wireless handsets. While the majority of respondents were not interested in the idea, nearly 13% of users were either interested or very interested in doing so.

**Figure 4**  
**U.S. Interest in Home Phone-to-Wireless Changeover**

*Q. How interested are you in completely replacing your home phone with wireless phones?*



N = 900

Source: IDC's *Personal Wireless Communications User Survey*, 2000

## **Leap Wireless: A Case Study**

Leap Wireless' U.S. brand, Cricket Communications, has taken a giant step toward promoting landline replacement. It has taken a very different approach to selling wireless service from traditional carriers. Cricket Communications focuses on controlling costs to increase profitability while offering rates competitive to landline rates. To reduce costs, Cricket does not offer roaming capabilities, produces simple bills, does not pay commissions to salespeople, and does not do credit checks on new customers. It offers unlimited local calling for \$29.95 per month. This price is similar to pricing for local landline service. In fact, over 60% of its subscribers report using their wireless phones as their primary phones, and 7% reported cutting their landline completely. Twelve percent of the calls on the network are mobile-to-mobile calls, and 40% are incoming. This lowers the interconnection charges the carrier has to pay for call termination, and the incoming calls result in termination fees paid to Cricket by the local exchange carrier (LEC).

Although it is possible for a large carrier to offer services similar to Cricket's, it is doubtful we will see it happen. Large carriers have a great amount invested in their nationwide networks and have much higher expenses and investments than Cricket. It is possible, however, for a carrier to develop another brand that is not at all associated with its parent company in the consumers' eyes and that offers a service similar to Cricket's without roaming capabilities, credit checks, or commissions to salespeople. If this brand could manage to control costs in the same way as Cricket, it too could develop a base of users who primarily use their wireless phones instead of their wired ones. These customers will not only give out their wireless phone numbers if all incoming calls are included in the base price, but they will also use their wireless phones more, which will likely result in less churn among those subscribers.

## **Vox.Link: Addressing Some Issues in Landline Replacement**

One of the major issues in total landline replacement is the fact that wireless phone battery life is limited. Let's face it: With a wired phone, you never have to worry about charging it. Another drawback to fully doing away with landline is the fact that you'll have only one handset in your house. That means that if you are in the back bedroom and you are lucky enough to hear your handset ring, you have to hunt down that handset in order to answer the call. (Many of us can relate to this situation when it comes to cordless phones in the house.)

One company, Vox.2, has developed a product called Vox.Link that should resolve these two issues. Vox.Link is a small "base station" that turns a wireless handset into a second phone line when the base station is plugged into a wireline connection. Vox.Link connects into the home's telephone wiring so that when a call comes in, all the phones in the house ring. The ring is distinctive to the handset on which the call came. The base station also acts as a charger, alleviating any worries about keeping the battery charged for all

calling needs. IDC expects the device to appeal to people who make and receive wireless calls at home, especially at the product's planned price point of \$180. The company could improve its product by offering a single base station that can handle more than one handset and by offering units supporting a wider variety of handsets.

## **Landline Replacement Forecast, 1999–2004**

### ***Methodology***

To determine the total yearly cellular/PCS MOUs, IDC first calculated the average monthly use per subscriber based on findings from our 1999 and 2000 *Personal Wireless Communications User Surveys*. These telephone surveys of households that were using cellular and/or PCS were conducted at the beginning of 1999 and the beginning of 2000.

According to the surveys, the average monthly household cellular/PCS use was 155 minutes in 1999 and 248 minutes in 2000. Because these usage levels are for households, IDC next considered the average number of cellular/PCS phones per household. In 1999, this number was 1.42; in 2000, this number was 1.55. IDC then calculated the average monthly use per subscriber by dividing the total monthly household use by the number of cellular/PCS phones per household. For 1999 and 2000, this worked out to 109 and 160 minutes per month, or 1,307 and 1,918 minutes per year, respectively.

Next, IDC's cellular/PCS subscriber forecast was used to determine the total cellular/PCS MOUs. According to the forecast, at the end of 1999, there were more than 77 million cellular/PCS subscribers. By the end of 2004, IDC predicts that there will be nearly 144 million cellular/PCS subscribers. The average number of cellular/PCS subscribers in 1999 was then multiplied by the average yearly cellular/PCS use. The result was that more than 93 billion wireless minutes were used in 1999. Similar calculations were done for the 2000–2004 period.

Next, the total landline MOUs were calculated and forecast by IDC's landline research group. Using the total landline and total wireless MOUs, IDC determined the total telecom MOUs. Last, wireless and landline MOUs were calculated as a percentage of total telecom MOUs.

IDC also has consumer, business, voice, and data splits in the forecast. These forecasts were made using the forecasts for the consumer/business and voice/data splits from *U.S. Wireless Services and Devices Market Assessment, 1999–2004* (IDC #22214, April 2000).

For more detail on the landline forecasts, see *U.S. Residential Landline Telecommunications Market Assessment and Forecast, 1999–2004* (IDC #22720, September 2000).

*Note: All numbers in this bulletin may not be exact due to rounding.*

### 1999-2004 Forecast

Table 1 shows the average monthly cellular/PCS MOUs per household, the average number of cellular/PCS phones per household, and the average monthly and annual cellular/PCS MOUs per subscriber.

<b>Table 1</b> <b>U.S. Cellular/PCS Minutes of Use, 1999-2004</b>							
	1999	2000	2001	2002	2003	2004	1999-2004 CAGR (%)
Average monthly cellular/PCS MOUs per household	155	248	396	595	832	1,082	47.6
Average number of cellular/PCS phones per household	1.42	1.55	1.64	1.73	1.85	1.98	6.8
Average monthly cellular/PCS MOUs per subscriber	109	160	242	343	451	548	38.1
Average yearly cellular/PCS MOUs per subscriber	1,307	1,918	2,909	4,116	5,411	6,574	38.1
<b>Key Assumptions:</b>							
• Cellular and PCS carriers will continue to attract new subscribers and encourage higher use levels among existing subscribers.							
• Cellular and PCS carriers will continue to expand their target markets for service.							
<b>Messages in the Data:</b>							
• The average yearly wireless MOUs per subscriber will grow at a CAGR of 38.1% between 1999 and 2004.							
• An increase in the number of cellular/PCS phones per household will account for some of the growth in MOUs.							
Source: IDC, 2000							

Over the forecast period, cellular/PCS household MOUs will increase at a compound annual growth rate (CAGR) of 47.6%, from 155 minutes per month in 1999 to 1,082 minutes per month in 2004. However, not all of this increase will be from existing subscribers increasing their use. An increase in the number of cellular/PCS phones per household will account for some of the growth in MOUs. Specifically, the number of cellular/PCS phones per household is expected to grow at a CAGR of 6.8%, from 1.42 in 1999 to 1.98 in 2004. At the same time, cellular/PCS use by the individual subscriber will increase from 109 minutes per month in 1999 to 548 in 2004.

IDC calculated average yearly wireless MOUs, landline MOUs, and total telecom MOUs. Wireless and landline MOUs were then calculated as a percentage of total telecom MOUs. The results are shown in Table 2.

In summary, the growth of total annual wireless MOUs will be strong, increasing at a CAGR of 57.5%, from approximately 93 billion in 1999 to 898 billion in 2004.

On the landline side, growth in MOUs is expected to be more moderate. Landline MOUs should grow at a CAGR of 8.0%, from 3.1 trillion in 1999 to 4.5 trillion in 2004.



**Table 2**  
**U.S. Yearly Wireless and Landline Telecom Minutes of Use, 1999–2004 (B)**

	1999	2000	2001	2002	2003	2004	1999–2004 CAGR (%)
Yearly wireless MOUs	93	160	278	447	661	898	57.5
Yearly landline MOUs	3,061	3,307	3,576	3,870	4,164	4,495	8.0
Yearly total telecom MOUs	3,154	3,467	3,854	4,317	4,825	5,393	11.3
Wireless as a share of total telecom MOUs (%)	2.9	4.6	7.2	10.4	13.7	16.6	41.5
Landline as a share of total telecom MOUs (%)	97.1	95.4	92.8	89.6	86.3	83.4	-3.0

**Key Assumptions:**

- Cellular/PCS carriers will continue to attract new subscribers and encourage higher use levels among existing subscribers.
- Cellular/PCS carriers will continue to expand their target markets for service.
- Access-line growth will continue at approximately 3–4% per year over the forecast period due to population growth, housing growth, and the continuing trend of second-line installations.

**Messages in the Data:**

- The growth of total wireless MOUs will be strong, from 93 billion in 1999 to 898 billion in 2004.
- Landline MOUs will also experience strong growth throughout the forecast period.

Source: IDC, 2000

Overall, total telecom MOUs are forecast to increase from 3.2 trillion in 1999 to 5.4 trillion in 2004. Comparatively, the CAGR for wireless MOUs is considerably stronger than that for landline MOUs: 57.5% versus 8.0%. Therefore, over the forecast period, wireless MOUs as a percentage of total telecom MOUs will increase considerably, from 2.9% in 1999 to 16.6% in 2004, whereas landline MOUs as a percentage of total MOUs will decrease, from 97.1% in 1999 to 83.4% in 2004.

Table 3 shows the voice and data MOUs split for both landline and wireless. In 1999, nearly all wireless MOUs were voice; approximately 6% were data. Wireless data MOUs are expected to increase at a CAGR of 122.1%, from 1 billion in 1999 to 54 billion in 2004. On the landline side, the voice/data split is very different. Data MOUs represented approximately 30% of the landline MOUs in 1999. The landline data MOUs are expected to increase from 918 billion minutes in 1999 to 2.5 trillion in 2004, reflecting a CAGR of 21.9%. The split between data and voice landline MOUs shifts from 30/70 in 1999 to 55/45 in 2004. On the wireless side, the split between data and voice shifts from 1/99 to 6/94 during the same period. Overall, wireless data MOUs remain low compared with total telecom MOUs.

**Table 3**  
**U.S. Wireless and Landline Voice and Data Telecom Minutes of Use, 1999–2004 (B)**

	1999	2000	2001	2002	2003	2004	1999–2004 CAGR (%)
Yearly wireless voice MOUs	92	157	270	429	628	844	55.8
Yearly wireless data MOUs	1	3	8	18	33	54	122.1
Yearly landline voice MOUs	2,143	2,150	2,146	2,129	2,082	2,023	-1.1
Yearly landline data MOUs	918	1,157	1,430	1,742	2,082	2,472	21.9

**Key Assumptions:**

- Cellular/PCS carriers will continue to attract new subscribers and encourage higher use levels among existing subscribers.
- Cellular/PCS carriers will continue to expand their target markets for service.
- Access-line growth will continue at approximately 3–4% per year over the forecast period due to population growth, housing growth, and the continuing trend of second-line installations.

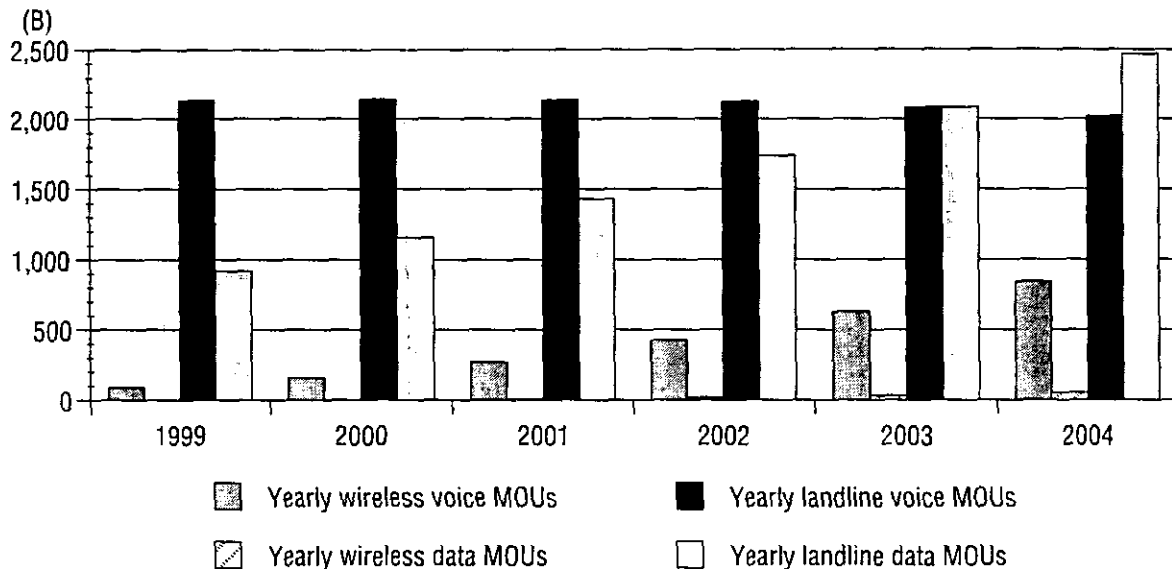
**Messages in the Data:**

- Wireless data MOUs are expected to increase at a CAGR of 122%, from 1 billion in 1999 to 54 billion 2004.
- In 2004, wireless voice MOUs will represent about 5% of the landline voice MOUs.

Source: IDC, 2000

Figure 5 shows the wireless/landline and voice/data splits. Wireless data, although represented by the smallest bar on the graph, is growing at the fastest rate: at a CAGR of about 122.1% over the five-year forecast period. This growth is closely followed by the CAGR for the wireless voice MOUs, which is approximately 55.8%. In 2004, wireless voice MOUs will be equal to 22% of the total telecom voice MOUs.

**Figure 5**  
**U.S. Wireless and Landline Voice and Data Telecom Minutes of Use, 1999–2004**



Source: IDC, 2000

Table 4 shows the split of wireless and landline MOUs by consumer and business segments. Wireless consumer MOUs will increase at a CAGR of 65.1%, from 45 billion minutes in 1999 to 556 billion minutes in 2004. Landline consumer MOUs also will increase over the forecast period, although at a much slower rate of 3.5% per year. In 1999, landline consumers used 1.2 trillion minutes; in 2004, they will use 1.4 trillion minutes (voice and data).

**Table 4**  
**U.S. Wireless and Landline Business and Consumer Telecom Minutes of Use, 1999–2004 (B)**

	1999	2000	2001	2002	2003	2004	1999–2004 CAGR (%)
Yearly wireless consumer MOUs	45	85	156	259	397	556	65.1
Yearly wireless business MOUs	47	75	122	188	265	341	48.5
Yearly landline consumer MOUs	1,213	1,267	1,299	1,373	1,407	1,442	3.5
Yearly landline business MOUs	1,848	2,040	2,277	2,497	2,757	3,053	10.6
Total consumer MOUs	1,258	1,352	1,454	1,633	1,804	1,999	9.7
Total business MOUs	1,895	2,115	2,400	2,685	3,021	3,394	12.4

**Key Assumptions:**

- Cellular/PCS carriers will continue to attract new subscribers and encourage higher use levels among existing subscribers.
- Cellular/PCS carriers will continue to expand their target markets for service.
- Access-line growth will continue at approximately 3–4% per year over the forecast period due to population growth, housing growth, and the continuing trend of second-line installations.

**Message in the Data:**

- Wireless will make up approximately 17% of the total telecom MOUs in 2004.

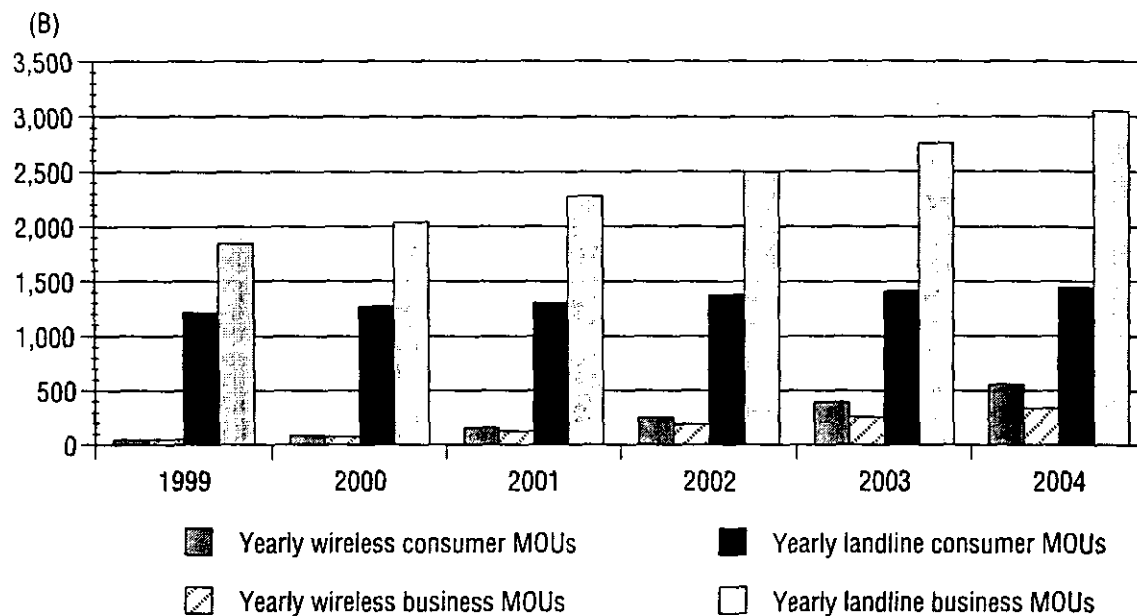
Source: IDC, 2000

Wireless business MOUs will increase at a CAGR of 48.5%, from 47 billion in 1999 to 341 billion in 2004. Landline business MOUs will increase from 1.8 trillion minutes in 1999 to 3.1 trillion in 2004, reflecting a CAGR of 10.6%.

Figure 6 shows the wireless/landline and business/consumer MOU splits. The group of wireless consumer MOUs is the fastest growing of the segments. In 2000, wireless consumer MOUs will surpass wireless business MOUs. Overall, wireless MOUs are a small part of the total telecom MOUs, but wireless use is growing quickly.

Table 5 shows the percentage of wireless subscribers who are landline replacers, according to the three types of replacement: those who completely replace landline, those who purchase wireless instead of additional landlines, and those who migrate some landline MOUs with wireless.

**Figure 6**  
**U.S. Wireless and Landline Business and Consumer Telecom Minutes of Use, 1999–2004**



Source: IDC, 2000

**Table 5**  
**U.S. Types of Landline Replacers, 1999–2004 (%)**

	1999	2000	2001	2002	2003	2004	1999–2004 CAGR (%)
Total landline replacement	5.5	6.0	8.0	10.0	12.0	14.0	20.6
Wireless instead of additional landlines	11.0	12.0	13.5	15.0	17.0	19.0	11.6
Wireless replacement of landline MOUs	43.7	49.0	52.1	55.0	57.5	59.0	6.2

**Key Assumptions:**

- People will continue to use landlines for data.
- Cellular/PCS carriers will continue to reduce or eliminate roaming and long distance charges.
- Some subscribers replacing some landline MOUs with wireless might be total landline replacers in future years. Therefore, growth in wireless replacement MOUs will be slower than the other categories of landline replacers.

**Messages in the Data:**

- In 2004, approximately 92% of wireless subscribers will use their wireless phones instead of landlines.
- The largest group of replacers will be those who replace some landline MOUs with wireless.

Source: IDC, 2000

The largest group of replacers will be those who migrate some landline MOUs to wireless. In 1999, approximately 44% of wireless subscribers fell into this group. By 2004, approximately 60% of wireless users will migrate landline MOUs to wireless. The second largest group is the group of subscribers who purchase wireless

instead of additional landlines, and the smallest group of replacers is the group who completely replaces landline with wireless. Over 94% of subscribers will, in one way or another, transfer landline MOUs to wireless by 2004.

### ***Forecast Assumptions***

IDC made the following assumptions in making its landline replacement forecast:

- This forecast relies on the forecast and assumptions made in *U.S. Wireless Services and Devices Market Assessment, 1999-2004* (IDC #22214, April 2000) as well as those made in *U.S. Residential Landline Telecommunications Market Assessment and Forecast, 1999-2004* (IDC #22720, September 2000).
- Cellular/PCS carriers will continue to attract new subscribers and encourage higher use levels among existing subscribers by offering attractive rate plans.
- Cellular/PCS carriers will continue to expand their target markets for service.
- Cellular/PCS carriers will continue to bundle value-added services, such as caller ID and voicemail, as part of their offerings.
- Cellular/PCS carriers will continue to reduce or eliminate roaming and long distance charges.
- Cellular/PCS carriers will continue to offer off-peak special rates such as free nights and weekends to encourage use during off-peak times.
- Replacers who replace only some MOUs will migrate into the total replacement category.
- Strong economic growth over the forecast period will continue to drive MOU increases.
- Increased competition in the long distance sector will generate additional price reductions, which will translate into strong MOU growth.
- Access-line growth will continue at approximately 3-4% per year over the forecast period due to population growth, housing growth, and the continuing trend of second-line installations.
- Growth in toll-free and private-line minutes will be strong as a result of network access integration. As more companies adopt the use of private lines for Internet access, they will also migrate their voice traffic to these dedicated circuits.

### ***Additional Comments***

IDC has fielded many questions on how much growth in the wireless MOUs represents new minutes of use versus those that have migrated to landline. Unfortunately, there is no easy answer,

although comparing the growth of landline MOUs to that sector's growth just a few years ago can shed some light on the issue. Still, one can only assume with rate plans that include night and weekend minutes for no charge and long distance at no charge, it is cheaper to use wireless over landline in many situations — already a practice of many users.

Another issue that comes up over and over is the percentage of replacement that is long distance versus local calling. This area, too, is difficult to quantify. Long distance calling is often much cheaper with a wireless phone because domestic long distance charges are included in many rate plans and because wireless home calling areas often expand farther than local landline calling areas.

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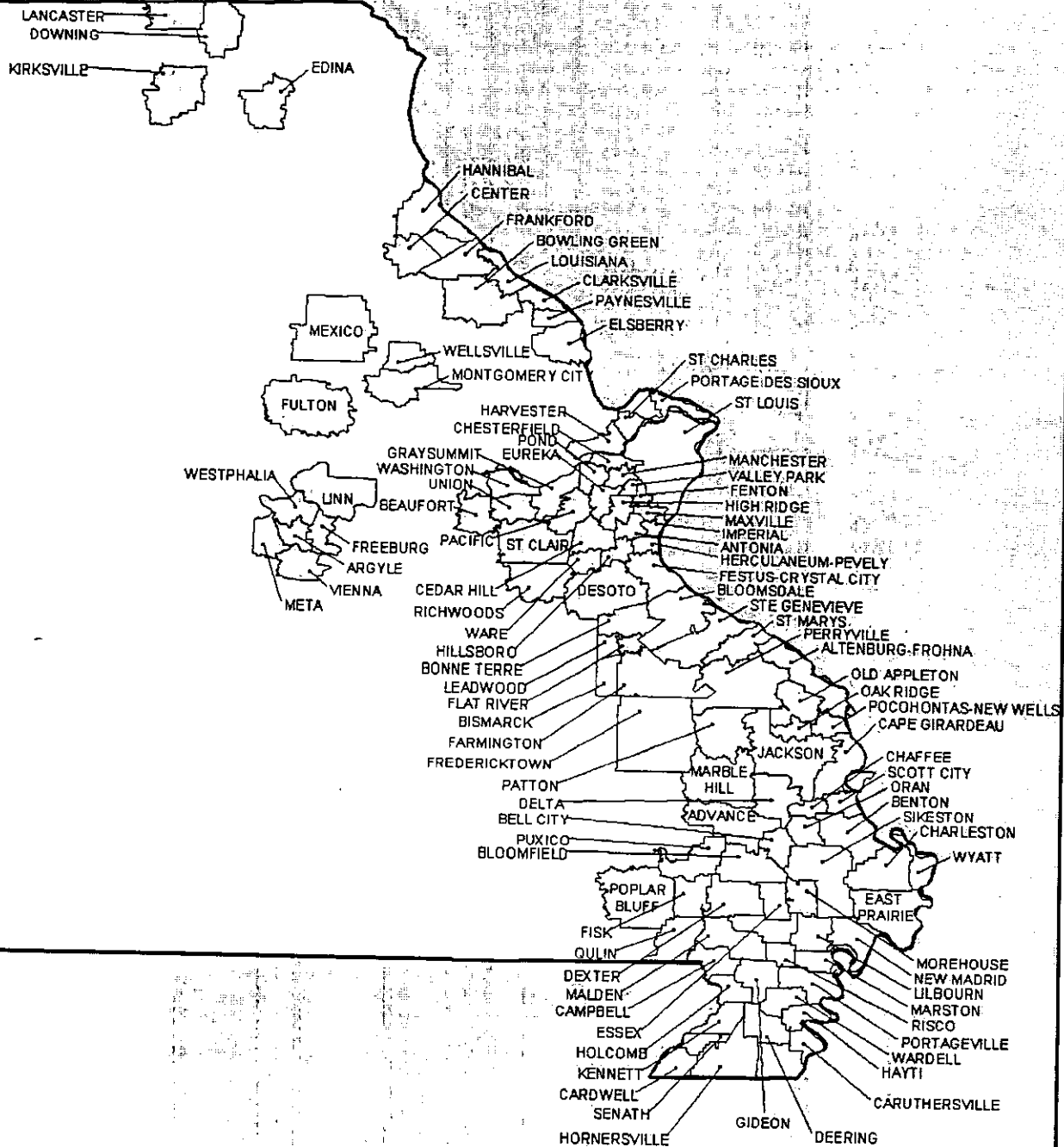
**Published Under Services:** Wireless and Mobile Communications

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**FITE**

**Schedule 11**

# Southwestern Bell Exchanges



SBC Services, Inc.  
Marketing Geographic  
Information Systems (GIS)  
Map prepared with  
third party GDT data.

45 - 52  
53 - 56

Missouri

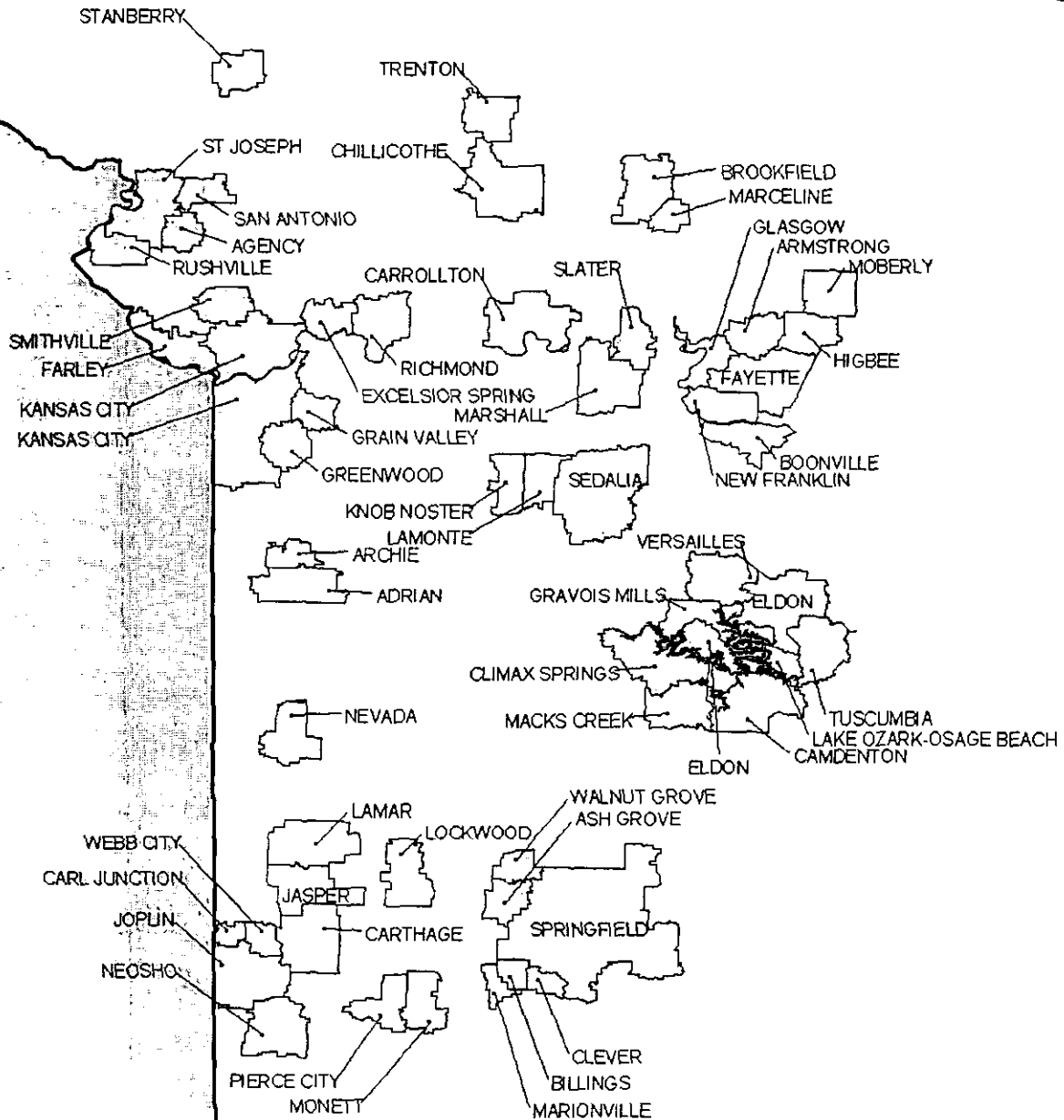
57 - 59  
60 - 65

Number of Residence CLEC Tariffs by Exchange





# Southwestern Bell Exchanges



SBC Services, Inc.  
Marketing Geographic  
Information Systems (GIS)  
Map prepared with  
third party GDT data.

45 - 52  
53 - 56

Missouri

57 - 59  
60 - 65

Number of Residence CLEC Tariffs by Exchange



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**Schedule 12**



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*Will Lindsey*

Will Lindsey  
National Director  
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† Next day phone delivery applies to all orders received by 4 p.m. CST, Monday through Friday. Orders received on Saturday prior to 2 p.m. CST will be delivered Monday. Orders placed on Sunday will be delivered on Tuesday.

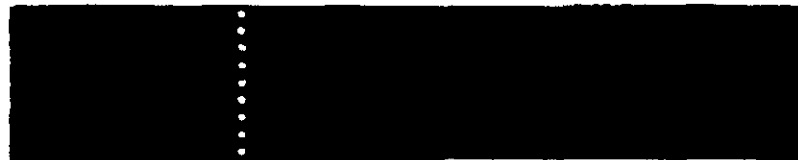
\*\* Credit card calls excluded. Domestic calls only.

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**NOKIA  
5165**



Actual Size





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Press and hold to turn your phone on or off

## NAVY KEY

Its current function is always displayed above the key

## MESSAGING

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## SCROLL

Scrolls through menus, sub-menus, and phone book  
Press and hold for continuous scrolling

**NOKIA  
5165**

Phone Shown  
Actual Size

**Call 1 800 363-1366**

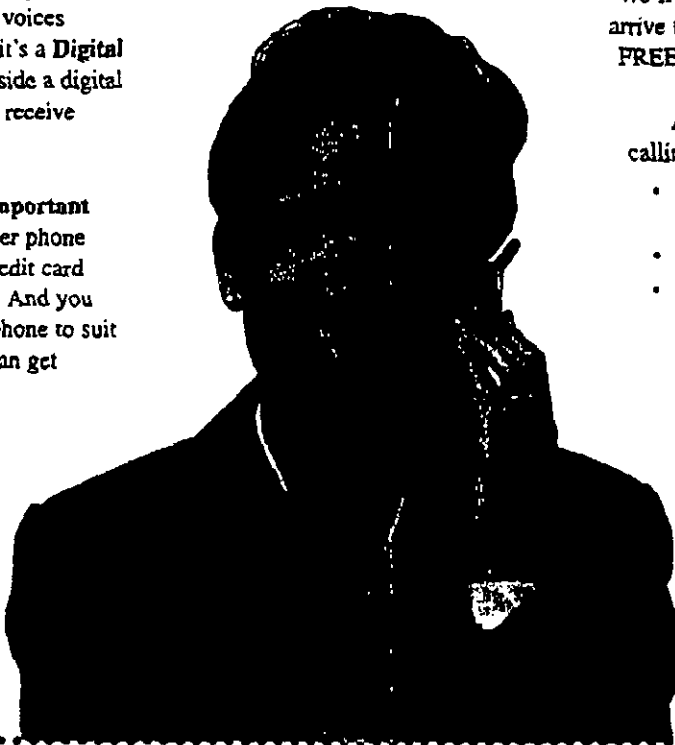
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With this great phone you get important features like a 100 name and number phone book memory — even one-touch credit card dialing, plus a clock with an alarm. And you can even change the color of your phone to suit your mood. As an accessory, you can get an extra faceplate in a variety of great colors.

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\* Actual battery life will vary due to usage patterns.  
† Next day phone delivery applies to all orders received by 4 p.m. CST Monday through Friday. Orders received on Saturday prior to 2 p.m. CST will be delivered Monday. Orders placed on Sunday will be delivered on Tuesday.  
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- Menu driven 4-line display
- Dual keypad and speakerphone in handset and base
- Conference call capability
- Headset compatible (2.5mm)
- 50 name/number directory and 50 caller ID memory
- Visual message waiting indication
- Page/intercom

#### Add-on handset features:

- Charger unit
- Enhanced call waiting/caller ID\*
- 4-line display
- Handset speakerphone
- Conference call capability
- Headset compatible (2.5mm)
- 50 name/number directory and 50 caller ID memory
- Visual message waiting indication
- Page/intercom

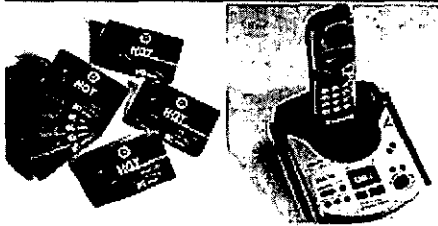
\* Requires phone company service.

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6/25/01

Product	Price
<b>V-Tech 2.4 GHz Cordless Master Base and Handset Speakerphone</b>	\$129.99
<b>V-Tech 2.4 GHz Cordless Add-on Handset</b>	\$69.99

Quantity

  
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[Panasonic 2.4 GHz Gigarange Cordless Phone & Answering System](#)  
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CAP

[Home](#)[Target Home](#) : [Home](#) : [Home Office](#) : [Equipment](#)[More Departments](#)**Equipment****Panasonic 2.4 GHz Gigarange Cordless Phone & Answering System**

\$179.99

The Panasonic Gigarange Extreme is a crackerjack cordless phone in a sleek, shock- and splash-resistant, rubber-trimmed shell. Phone has Call-Waiting Caller ID\*, an all-digital answering system and transmits at 2.4 GHz using advanced Spread Spectrum Technology. 1-yr. limited manufacturer's warranty. No. KX-TG2570S. Imported. 7Lx6W"



## Other features:

- Digital Duplex speakerphone
- 30-number speed-dial memory
- Two-way paging, intercom and 3 antennas
- Answering machine has voice prompts, time/day stamp
- Rechargeable nickel metal hydride battery (included) powers for up to 8 hours' talking time, 14 days on standby

\*Requires phone company service.

Product

Price

Quantity

**Panasonic 2.4 GHz Gigarange Cordless Phone & Answering System**

\$179.99

**ADD TO CART****RELATED ITEMS**

Prepaid Phone Cards  
\$6.99 - \$26.99



Plantronics Headset #M145  
reg. \$29.99, now \$14.94



Digital Answering System  
\$17.99




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06/24/01 - 06/30/01

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Extra Special Value, each  
900MHz cordless phone.  
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Cool new design with LSP  
Steak/Sauce electronic  
sk protection. Available in  
red/yellow and blue.  
In-store only.

**SONY PSYC**  
**79<sup>99</sup>** Low Price  
CD boom box  
with digital AM/FM tuner and remote  
control. Available in black or red.  
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**FUJI**  
**99<sup>99</sup>** Sale  
Zoom Date 100  
35mm camera  
has 2.5x (4x 100mm)  
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with red-eye reduction  
flash, electronic  
anti-shake.

**FUJI**  
**279<sup>99</sup>** Low Price  
Finepix 2500  
digital camera  
with 2.1 megapixel  
resolution and 2.5x  
digital zoom. Includes  
B&W ColorMatrix card.  
Plus digital memory now exclusively at Target.

**SONY**  
**99<sup>99</sup>** Low Price  
4-head hi-fi VCR has front A/V inputs, auto  
check self auto head clean and remote control.  
In-store only.

**RCA**  
**169<sup>99</sup>** Sale  
Now at Target! DVD player with CD, CD-R, CD-RW  
and MP3 playback. Features S-video and component  
outputs, and remote control. In-store only.

**PANASONIC**  
**189<sup>99</sup>** Sale  
DVD player with VCD, CD, CD-R, CD-RW and MP3  
playback. Includes S-video and component outputs.  
Sale - and remote control. In-store only.

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**V-TECH**  
**19<sup>99</sup>**  
**Extra Special Value, each**  
**900MHz cordless phone.**  
**Available in 3 colors. No. VT9111.**

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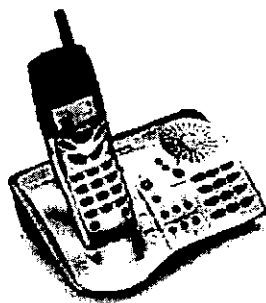
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This 2.4 GHz digital spread-spectrum cordless telephone system offers you all the features of a complete communication center! Easy to use--and you'll love the superior clarity.

**Description**

- Model No. VT 2431
- Supports multiple handsets
- Speakerphone in both the handset and base unit for hands-free operation
- Supports Call Waiting Caller ID\*
- Smart dialing from Caller ID memory
- Headset compatibility (headset not included)
- Handset-to-handset intercom
- Conference calling capability
- 50-entry alphanumeric phonebook
- Spare battery charger with power back-up function
- Belt clip
- 6 programmable ringer tones
- Multi-level redial function
- Backlit LCD and handset keypad
- Visual message waiting indication for use with Voicemail service
- Digital volume control
- Wall mountable

\*NOTE: This requires Call Waiting Caller ID service.

[Warranty Length](#)[Warranty Info](#)**May We Also Suggest****AT&T Prepaid Phone Card, 120 Minutes****\$12.00**[Add to Cart](#)**Shipping & Handling Information**

- Availability : Takes 1 to 2 business day process before shipping
- Shipping options & delivery times provided during checkout
- Gift wrapping available

**Additional Product Info****Model No.**

VT 2431

**Manufacturer Name**

VTech Communications, Inc.

**The following accessories are included:**

AC power adapter, telephone cord, battery pack, wall mounting bracket, belt clip, owner's manual

**The following accessories are not included:**

headset, spare battery, additional handset

**Specifications****Shipping weight in pounds**

2.55

**Some Assembly Required****Cord Length**

72-inches

**Volts**

110 AC

**Instruction Manual**

Included

**Instruction Languages**

English

**Batteries included**

Uses 1 size VTech 2400

**Assembled Country of Origin**

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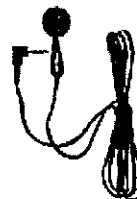
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## Nokia TracFone 252 Prepaid Cellular Phone

[See larger photo](#)**\$39.98**[Add to Cart](#)[Save for Later](#)

No contracts with this piece of technology! Just pay as you go.

### May We Also Suggest



**EarHugger All-In-One Cellular Headset for Cordless and Cell Phones**

**\$9.84**[Add to Cart](#)

### Description

- Lightweight and stylish
- Battery talk time up to 3 hours
- Standby time over 2 days
- Large, easy-to-read display
- Keypad lock prevents accidental calls
- Cigarette lighter adapter for car (included)
- AC charger plugs into wall (included)
- NiMH battery (included)
- Weighs under 6-1/2 ounces
- No age limit
- No credit applications
- No security deposit
- No monthly bills

### Warranty Length

### Shipping & Handling Information

- Availability : Takes 1 to 2 business day process before shipping
- Shipping options & delivery times provided during checkout
- Gift wrapping available

### Additional Product Info

**Model No.**

TF252CW

**Manufacturer Name**

TRACFONE Wireless, Inc

### Specifications

**Shipping weight in pounds**

1.25

**Cord Length**

60 inches

**Volts**

110V

**Instruction Manual**

Included

**Instruction Languages**

English, Spanish

**Batteries included**

Uses 1 size 3.6V/nmh b

**Assembled Country of Origin**

USA

**Components Country of Origin**

USA and/or Imported

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Sony brings its reputation for outstanding quality to this cordless phone and answering machine.

**May We Also Suggest****AT&T Prepaid Phone Card, 120 Minutes****\$12.00**[Add to Cart](#)**Description**

- Model No. SPPA946
- 900 MHz phone
- Answering machine
- 3 message boxes
- 2-way paging and intercom
- 20-speed dial preset
- Voice-guided operation
- Permanent flash memory
- Call screening on base
- 7-hour talk time and 7-day standby

**Shipping & Handling Information**

- Availability : Takes 1 to 2 business day process before shipping
- Shipping options & delivery times provided during checkout
- Gift wrapping available

**Additional Product Info****Model No.**

SPPA946GRAY

**Manufacturer Name**

Sony

**The following accessories are included:**

Telephone cord, battery pack, AC power adapter, wall-mount bracket

**Specifications****Shipping weight in pounds**

3.4

**Assembled Country of Origin**

USA and/or Imported

**Components Country of Origin**

USA and/or Imported

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Ideal for busy households, this 900 MHz cordless phone offers 3 voice mailboxes along with a tapeless digital answering system.

**Description**

- 10-number memory
- Selectable dialing
- Call screening/intercept
- Remote access
- 15 minutes of recording time
- Time/day stamp
- Multiple outgoing announcements
- Voice prompts
- Automatic on/off
- Hold and redial
- Memo
- Belt clip
- Spare battery charger
- Model No. 9351

[International Restrictions](#)[Warranty Length](#)[Warranty Info](#)**May We Also Suggest****AT&T Prepaid Phone Card, 250 Minutes****\$25.00****Shipping & Handling Information**

- Availability : Takes 1 to 2 business day process before shipping
- Shipping options & delivery times provided during checkout
- Gift wrapping available

**Additional Product Info****Model No.**

AT&amp;T 9351

**Manufacturer Name**

Advanced American Telephones

**Specifications****Shipping weight in pounds**

2.5

**Cord Length**

36 inches

**Volts**

110V

**Instruction Manual**

Included

**Instruction Languages**

English

**Assembled Country of Origin**

Imported


**Components Country of Origin**

Imported

**Cordless w/Answ. Machines**

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**sony style**






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Sony's SPP-A972 2-Line Digital 900MHz Cordless Phone Digital Answering Machine features two-line operation, 900MHz for extended range, Jog Dial®, Digital Security, a Sound Quality, and Caller ID with Call Waiting. So whether you decide to chat with your friends all night, or relax and let the machine pick up, the SPP-A972 is the phone for you.

**SPP-A972** **\$149.95**

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<b>SPP-A2480</b>	<b>SPP-A2470</b>	<b>SPP-A972</b>	<b>SPF</b>
<b>\$199.95</b>	<b>\$179.95</b>	<b>\$149.95</b>	<b>\$12</b>

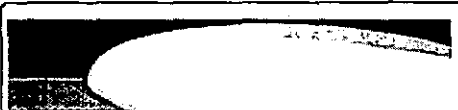
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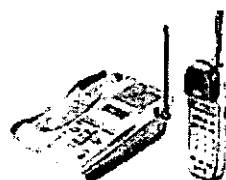
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## Cordless w/Answ. Machines

sony style



900m



electronics

Move about the house as you chat with friends using Sony A9171 High Power Digital Cordless Telephone. Its chic si will add charm to your home decor. Features include a Hi Digital Spread Spectrum for Superior Range and Interference Reduction, Caller ID with Call Waiting, Digital Privacy and Sound Quality, a Handset Remote Control, and Call Scre the Base. Also featuring a Digital Answering machine, the A9171 is the phone for you.

SPP-A9171

\$129.95

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SPP-A2480  
\$199.95



SPP-A2470  
\$179.95



SPP-A972  
\$149.95

SPP  
\$12

sony style

Corded/Feature

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Want to know who is calling... Sony's IT-D20 Caller ID Telephone will tell you. This product features Caller ID with Call Waiting Number Directory, a 20 Number Caller ID Memory, and a Backlit LCD Display. You also enjoy features like On-Ho and Memory Match Ringing™ with the IT-D20. So let the ring if you wish -- Sony's got their number.

IT-D20

\$24.95

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IT-M804  
\$159.95

IT-M704  
\$129.95

IT-M602  
\$79.99

IT-E  
\$29

Order by Phone: 800-871-7369

Compatible With: VersaLink 4.0 & 4.1

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