



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



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.



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!**



WITH A GIFT FROM VERIZON WIRELESS

SingleRate™ National Calling Plans

with included Nationwide Long Distance!

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

YOUR CLOSEST VERIZON WIRELESS
COMMUNICATIONS STORES ARE:

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FLORISSANT, MO 63033

NORTHWEST PLAZA
352 NORTHWEST PLAZA, STE. 6
ST. ANN, MO 63074

\$35 monthly
access

**One low rate
coast to coast.**

Includes 2150 Minutes

- 150 anytime minutes
- 2000 weekend minutes

Calling plan and phone available with new 1 or 3-year service agreement.

MOTOROLA StarTAC 7866

only **\$99** Plus Included
Nationwide Long Distance!

www.verizonwireless.com

Included long distance is for calls within the U.S.A. Coverage and rates are limited (EXCLUDING ALASKA). Subject to terms of Cellular Agreement and Price Plan. New Service Agreement required. Early termination fee of \$175. Requires credit approval. Cannot be combined with other offers. Usage rounded to the next full minute. Unlimited international text. No cost support to home, local & other charges. Digital service not available in all areas. Cordless phone required. Service hours: Monday 1000 am to Monday 5:00am, Wednesday and the weekend. All times are approximate. ©2000 Motorola, Inc. Phone and data by may vary. Phone features not available at Radio Shack. Other models 3/27/01 ©2001 Verizon Wireless.

verizon wireless

Verizon Wireless
300 Maryville University Dr.
St. Louis, MO 63141

MAY 2 1 2001

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PAID
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Pittsburgh, PA

P2/2/93
54348300

FLORISSANT, MO 63034-3207

150 Anytime Minutes - 2000 Weekend Minutes

Here's your chance to give them all back.

SECURITY love COMFORT

nothing gives

verti on wireless



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Permit #4204
Pittsburgh, PA

THE

Another

GIVES



SECURITY
love
REASSURANCE
COMFORT

*Here's your chance to
give them all back...*

Plus! Receive 2250 Digital Minutes!
Includes Nationwide Long Distance
(250 minutes, 2000 minutes (minutes))

1-800-25-JOIN-IN

verizon wireless



Verizon Wireless
P.O. Box 98082
Bellevue, WA 98009-9882

MAY 14 2001

***** ECRLT ** C-025
[Redacted]
[Redacted]
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're 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 (1.800.258.4646) 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

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

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KANSAS CITY, KS
80th Street & State Avenue
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LAWRENCE
23rd & Iowa
785-766-0275

LENEXA
95th Street & Qulvira
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
913-696-6000

SHAWNEE
Shawnee Mission Parkway & Plumm
913-248-1988

TOPEKA
Prestige Plaza across from
West Ridge Mall on Wanamaker
765-221-2560

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

WICHITA NORTHWEST
West of Ridge Road
on 21st Street
316-619-6000

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 Belt Highway
816-390-6700

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 1/10 minute. Unused minutes lost. All data subject to taxes, fee and other charges. Verizon Wireless Long Distance required. Plan includes free in-state morning 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 service charges apply to local and long distance calls. Night & Weekend hours are from 8 am to 9:00 pm weekdays and all weekends. Digital service not available in all areas. New activation required. Service equipment 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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Simple. Affordable. National.

verizon wireless

8 states. One simple rate!

Call 1.800.2 JOIN IN Today (1.800.256.4646)

SingleRate Midwest Calling Plan*	
\$40 PER MONTH	150 MINUTES
\$50 PER MONTH	400 MINUTES
\$60 PER MONTH	500 MINUTES
FREE nationwide long distance FREE roaming 1000 night & weekend minutes	



Web-enabled
Kyocera 2035a
digital phone

Ask about
special savings
on this
feature-packed
digital phone!

- Tri-mode provides more areas of service
- Web and e-mail access
- Five-line, full bit-map display
- Vibrate alert
- Up to 3.5 hours talk time
- Up to 5 days standby time
- Color Faceplates available



Let's get something perfectly clear.

**Your reception
for starters.**

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.**

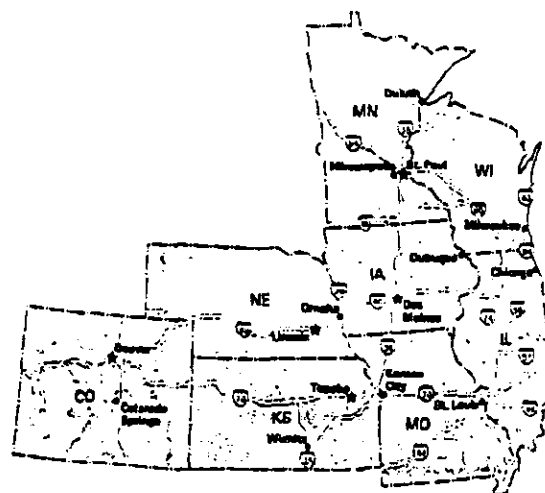
What this means for you is that you can make important business calls where and when you want. Travel throughout eight Midwestern states with no roaming charges and free long distance to anywhere in the U.S., enjoying the finest digital quality.

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.

Visit the Verizon Wireless Store Nearest You or Call 1.800.2 JOIN IN (1.800.256 4666) Today!

K A N S A S

KANSAS CITY, KS
80th Street & State Avenue
913-696-5111

LAWRENCE
23rd & Iowa
786-768-0275

LENEXA
96th Street & Quivira
913-898-5141

MERRIAM
Johnson Drive & I-35
913-688-5121

OAK PARK MALL KIOSK
1st level, near Dillard's
913-869-0205

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

OVERLAND PARK
Two blocks West of Metcalf
on 119th Street
913-696-6000

SHAWNEE

Shawnee Mission Parkway
& Plumm
913-248-1888

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

M I S S O U R I

INDEPENDENCE
40 Highway & Noland Road
816-478-2800

Independence Center Kiosk
Main Entrance
816-795-7399

KANSAS CITY NORTH
64th Street & I-29
816-587-8008

LEE'S SUMMIT
291 Highway & Tudor Road
816-596-5000

LIBERTY


291 Highway & Liberty Drive
816-560-1002

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

All stores open Sundays, except St. Joseph location.

W0004-2540


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8 states.
One simple rate.
Superior network
quality.

Sign up for the
new SingleRate™ Midwest calling
plan and save 30% on two or more
Executive Choice Accessories.

Details inside.



verizonwireless

Your business can count on superior service.

Superior Coverage

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.

Superior Customer Service

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 Plan. One-year agreement required. \$50 service activation fee applies to one-year agreement; waived on two-year agreements. Cannot be combined with other offers. CDMA phone required. Usage rounded to next full minute. Unused minutes do not roll over. All calls subject to taxes, fees 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. Airtime charges apply to local and long distance calls night & weekend hours are from 6 pm to 6:28 am weekdays and all weekends. CDMA 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

VW0004-43M0

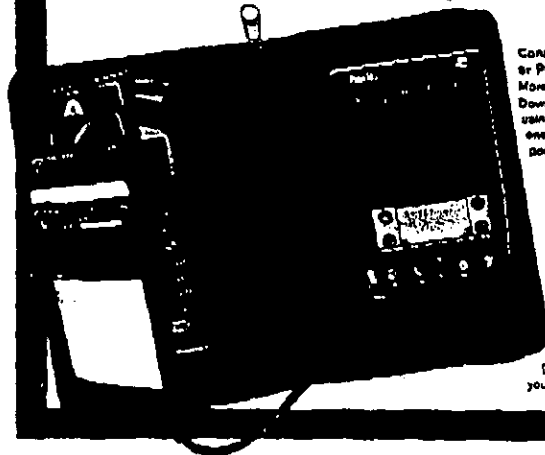
Join in.

verizonwireless

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™ (i) or Palm™ V Handhelds
More flexibility, mobility and accessibility. Download data and access your e-mail using your Systems phone! Carry it all in one case, with an extra zippered pocket and credit card holder.

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

Leather Case
Protect 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.

Soft Case
Special swivel feature for comfort and convenience.

Sender:	LOCAL WIRELESS SERVICE CENTER LEES SUMMIT, MISSOURI (1-866-240-9647)	Date/time of message origin:	WEDNESDAY/14/23 G.M.T.
Message to be delivered by:	U.S. POSTAL SERVICE	Pages:	1 (ONE)
Recipient:	*****AUTOM 5-DIGIT 64063 040063586 MKO LE 0013571-1-RR [REDACTED] Lees Summit, MO 64063-2647 [REDACTED]	Enclosures:	1 (ONE)
	[Barcode]	Offer Deadline:	20. JUNE 2001
		Toll free number to get free phone/savings:	1-866-240-9647
		Nonflown ID #:	040063586

YOU HAVE BEEN PRE-APPROVED TO RECEIVE A PLATINUM WIRELESS SERVICE PACKAGE FROM WORLDWOM 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.

AS LONG AS LIMITED QUANTITIES ARE AVAILABLE, YOU CAN GET A MOTOROLA DIGITAL WIRELESS PHONE WITH NUMEROUS BUILT-IN FEATURES. REGULARLY PRICED AT \$235.00 -- 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 1-866-246-7644 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
1-866-240-7641
<http://wireless.wcom.com/exclusive>

SEE REVERSE SIDE FOR IMPORTANT CONSUMER INFORMATION

(*) 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 1-888-567-2628 or write to Trans Union LLC Marketing Opt Out, P.O. Box 97328, Jackson, MS 39286-7328.

* 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 ...

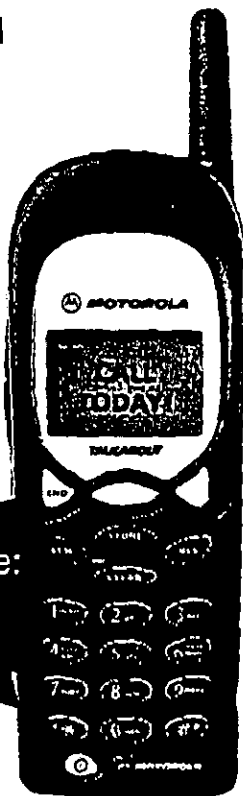
A FREE PHONE

(PAY JUST SHIPPING & HANDLING)

PLUS UP TO 14,400
MINUTES FOR AN
ENTIRE YEAR!

A VALUE OF
UP TO
\$5,400

Retail Price:
\$135.00
FREE!*



WORLDCOM
wireless.

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
USA 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
 - Speed Dialing
 - Unanswered Call
Indicator
 - Last Number Recall
 - 9 Individual Ring Styles
 - Large Graphic Display
- And Much More!

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

Platinum service in
your area with your
FREE PHONE includes
these calling features...
at no extra cost!

Voice Mail

means you'll never miss another
important message.

Call Waiting

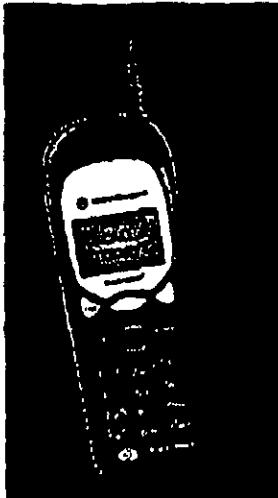
means you'll never miss another
important call.

3-Way Calling

allows you to add another party to
an existing conversation.

MAY 23 2001





WORLD COM
wireless.

Choice 200 Digital Plan Includes:

- **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!

MAY 23 2001

wireless.wcom.com/exclusive



CINGULAR WIRELESS ERICSSON MOTOROLA NOKIA CINGULAR WIRELESS ERICSSON MOTOROLA NOKIA CINGULAR WIRELESS
SOUTHWESTERN BELL WIRELESS ERICSSON MOTOROLA NOKIA CINGULAR WIRELESS ERICSSON MOTOROLA NOKIA CINGULAR WIRELESS

 **cingular**SM
WIRELESS

FORMERLY SOUTHWESTERN BELL WIRELESS

FREE!

ERICSSON  1228 DIGITAL PHONE

PLUS!

1000 WEEKEND MINUTES!

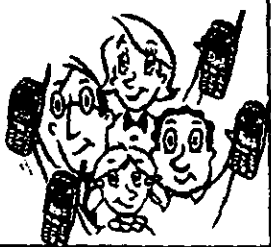
- Or
- Unlimited Mobile-To-Mobile
 - FREE Long Distance from home calling area

Hurry!
Offer Ends
1/31/01!

FAMILY TALKSM

Only **\$19⁹⁵** 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.



NOKIA 5125

\$19⁹⁵

GRAND OPENING!

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

**DIERBERG
TELEGRAPH PLAZA**
5656A Telegraph Rd
(314) 846-1100

FLOWER VALLEY
37 Flower Valley
Shopping Center
(314) 838-8966

KIRKWOOD
201 No Kirkwood
(314) 909-6698

SWANSEA PLAZA
2623 No Illinois St
(Hwy 159)
(618) 355-0111

**WOODCHASE
SHOPPING CENTER**
13393 Olive Blvd
(314) 878-0980

Owned and Operated by Affordable Portables

*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.

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

AD CODE: CINGTL-0051

SOURCE: St. Louis Post-Dispatch-JAN 25 01

SS

"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 fighting 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.



AD CODE: CHCOCA-0243

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.

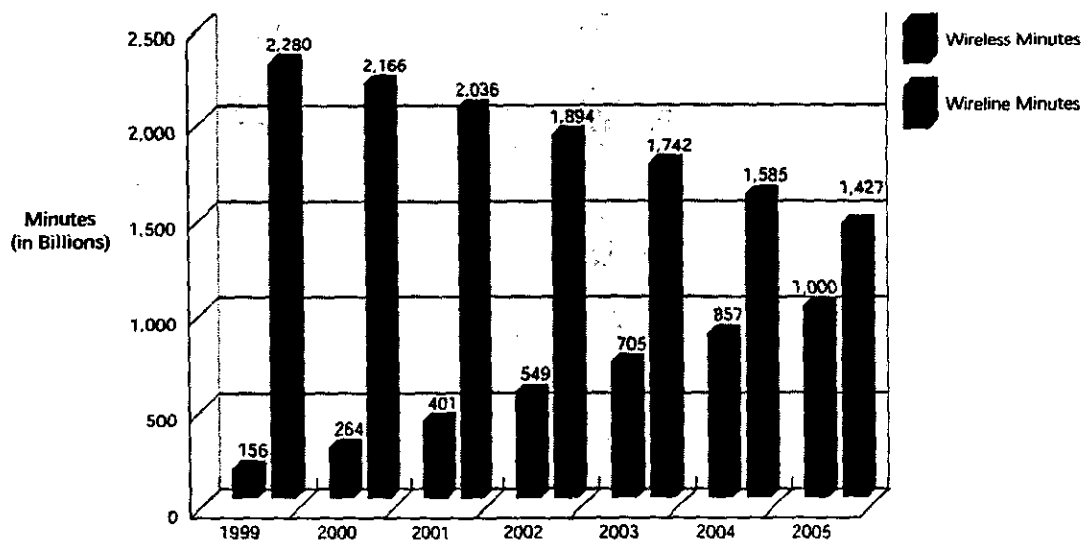
Almost seven years later, the cellular phone industry has progressed much further than ever imagined. In the United States penetration levels have reached 36%, and in several European countries penetration has exceeded 60%. The rise in digital penetration has improved the clarity and capacity of cellular 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



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Schedule 9

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

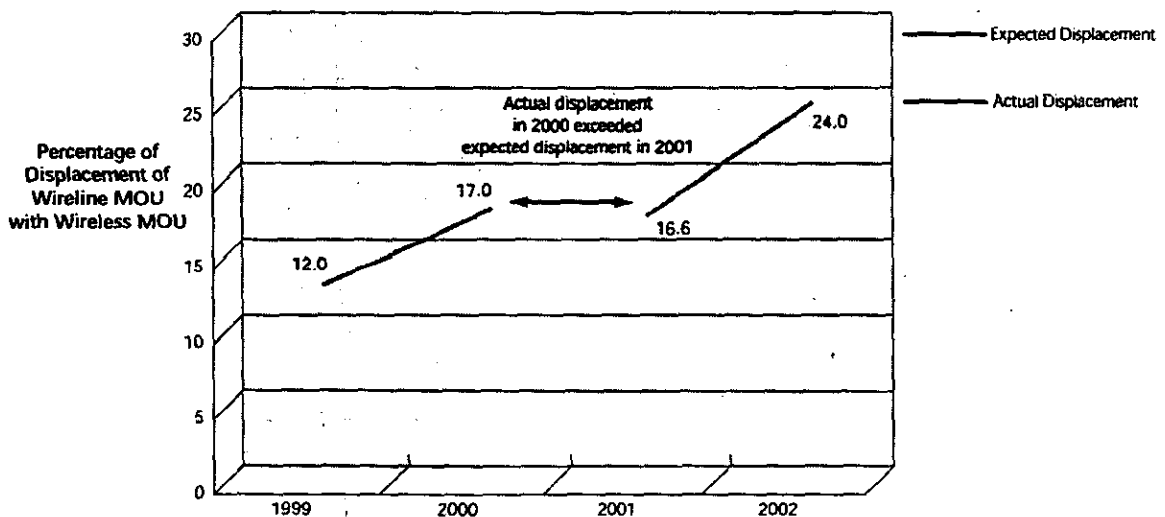
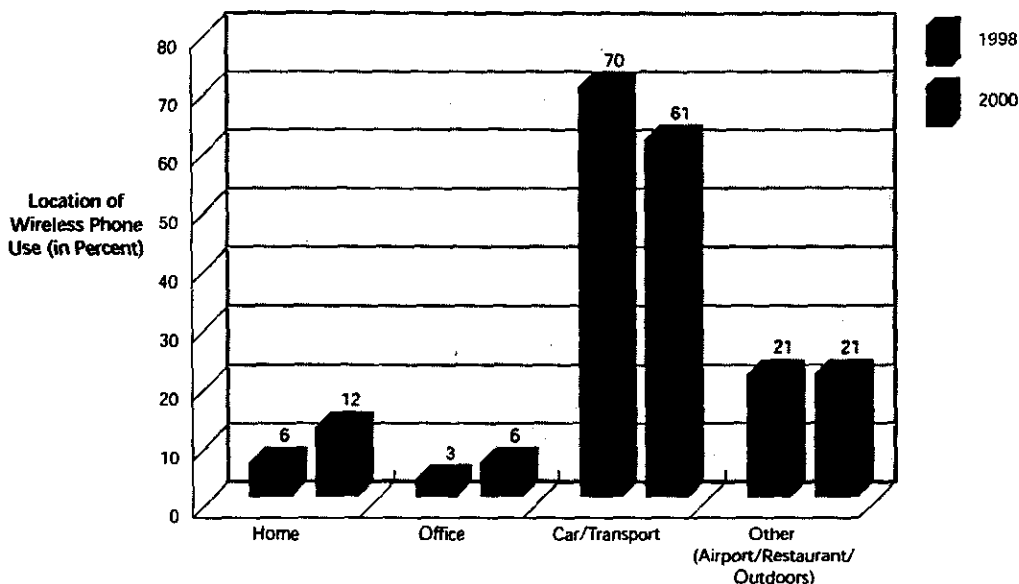


Exhibit 3**Customer Wireless Phone Usage Patterns***Source: the Yankee Group, 2000***Cellular vs. PCS Displacement**

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.

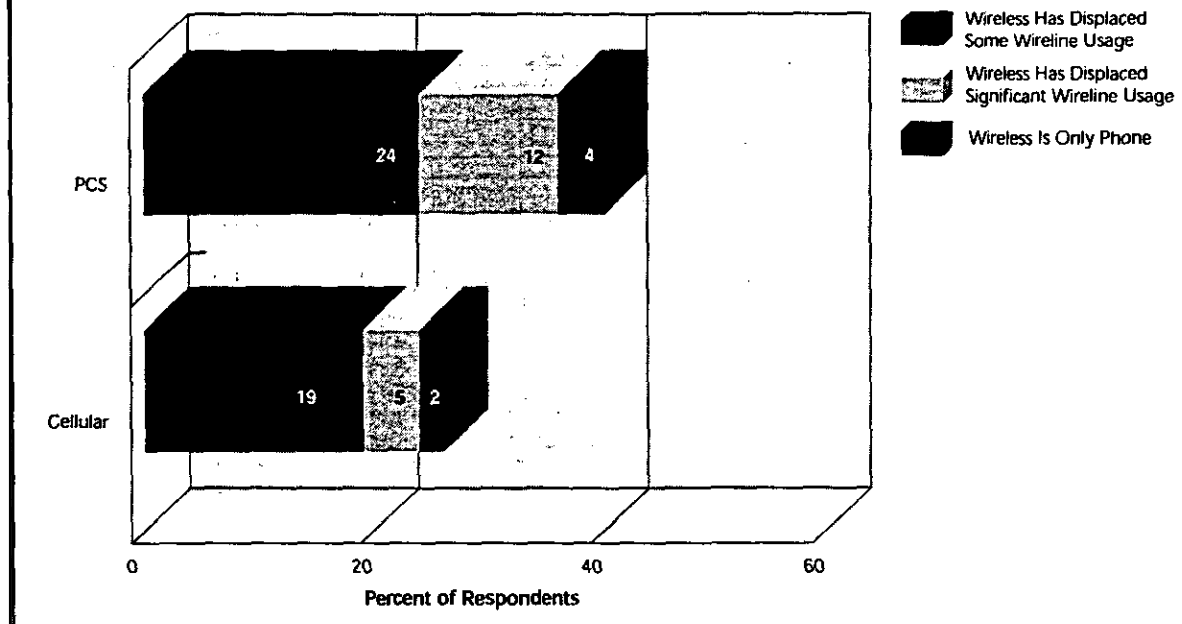
II. Factors Stimulating Wireline Displacement

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.

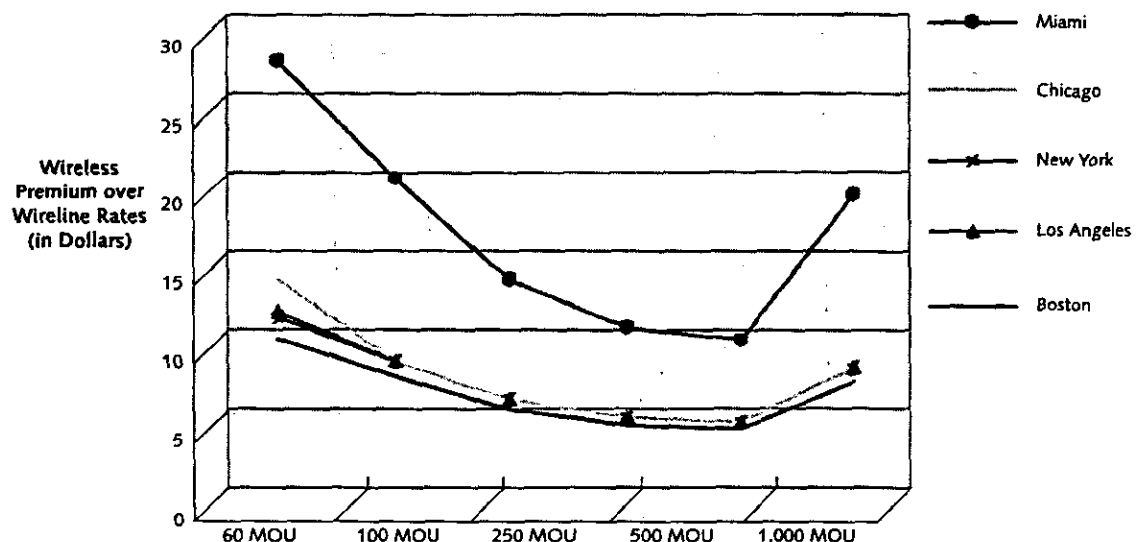
Currently, wireless prices in North America are still, on average, four or five times higher than wireline rates; therefore, aggressive displacement in the United States is still a few years off. However, as you can see in Exhibit 5, as customers begin approaching usage levels of 500 and 1,000 wireless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

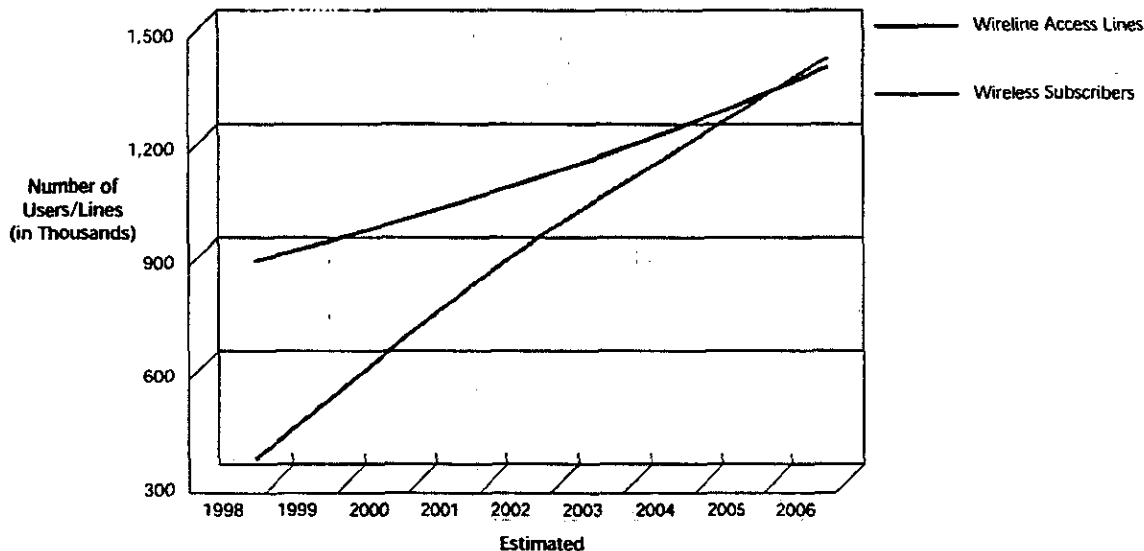
There are still several obstacles facing landline displacement in the United States, including:

- **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

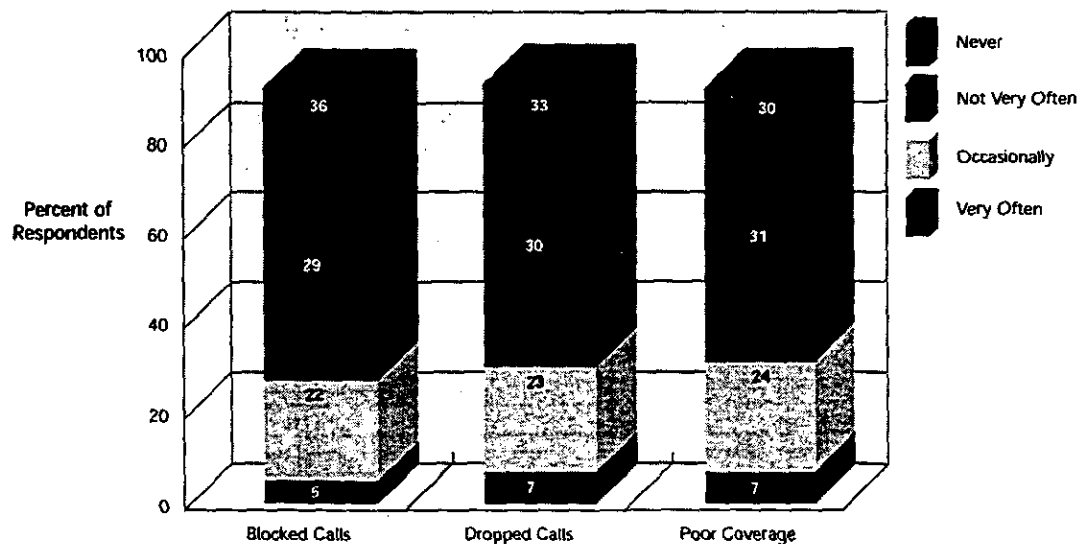
Source: the Yankee Group, 2000



- **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



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.

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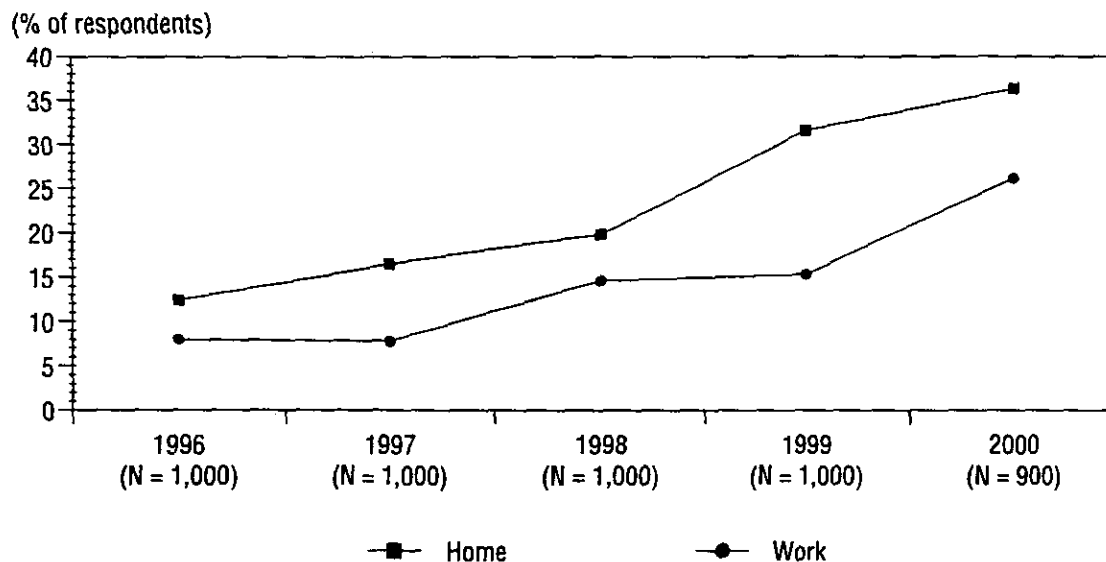
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said that they used their wireless phones for over 35.0% of all their calls made at work (see Figure 2). In fact, 14.0% of them made and received 100% of their calls at work on their wireless phones.

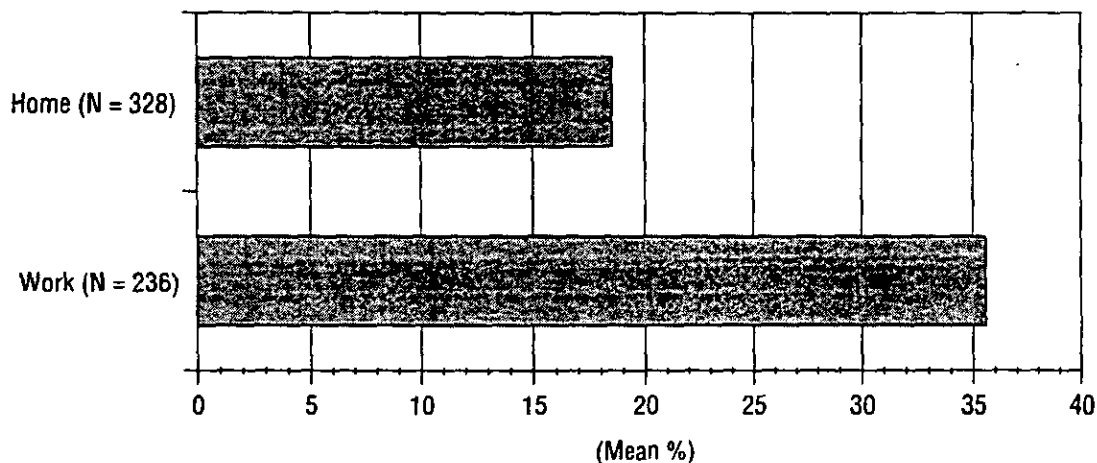
Figure 1
U.S. Respondents Who Make Wireless Calls from Home and Work, 1996–2000



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?



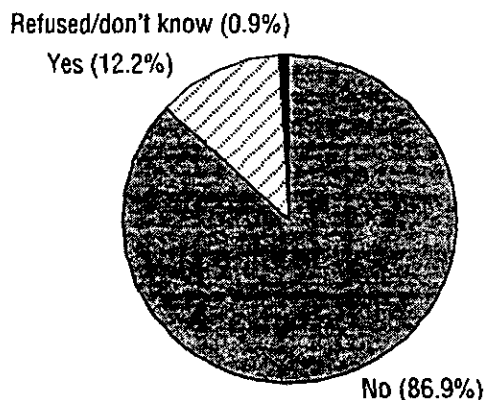
N = Respondents who reported making 1% or more of wireless calls at home or work.

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?



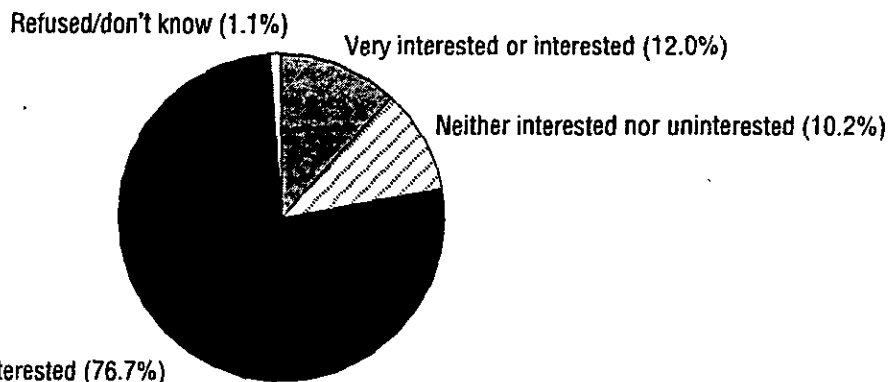
N = 900

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.

Table 1 U.S. Cellular/PCS Minutes of Use, 1999-2004							
	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
Key Assumptions:							
• 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.							
Messages in the Data:							
• 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.

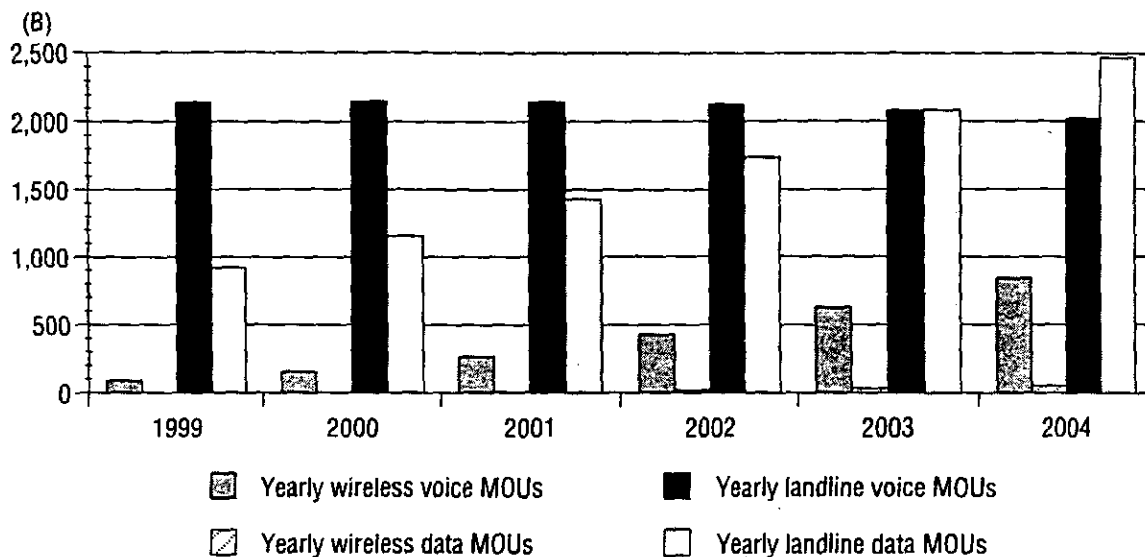
Messages in the Data:

- 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.

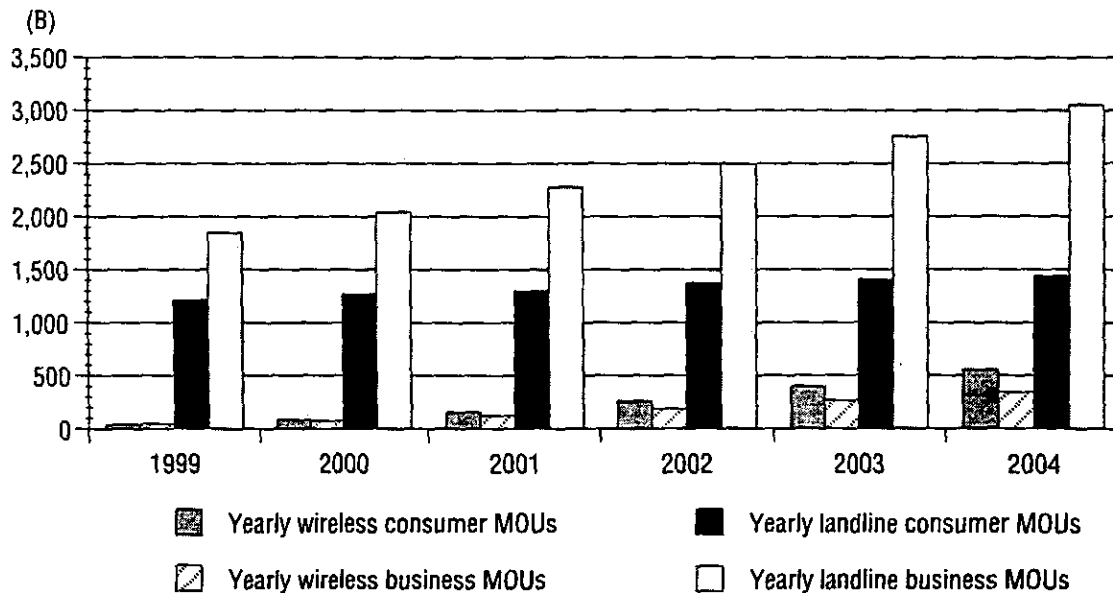
Source: IDC, 2000

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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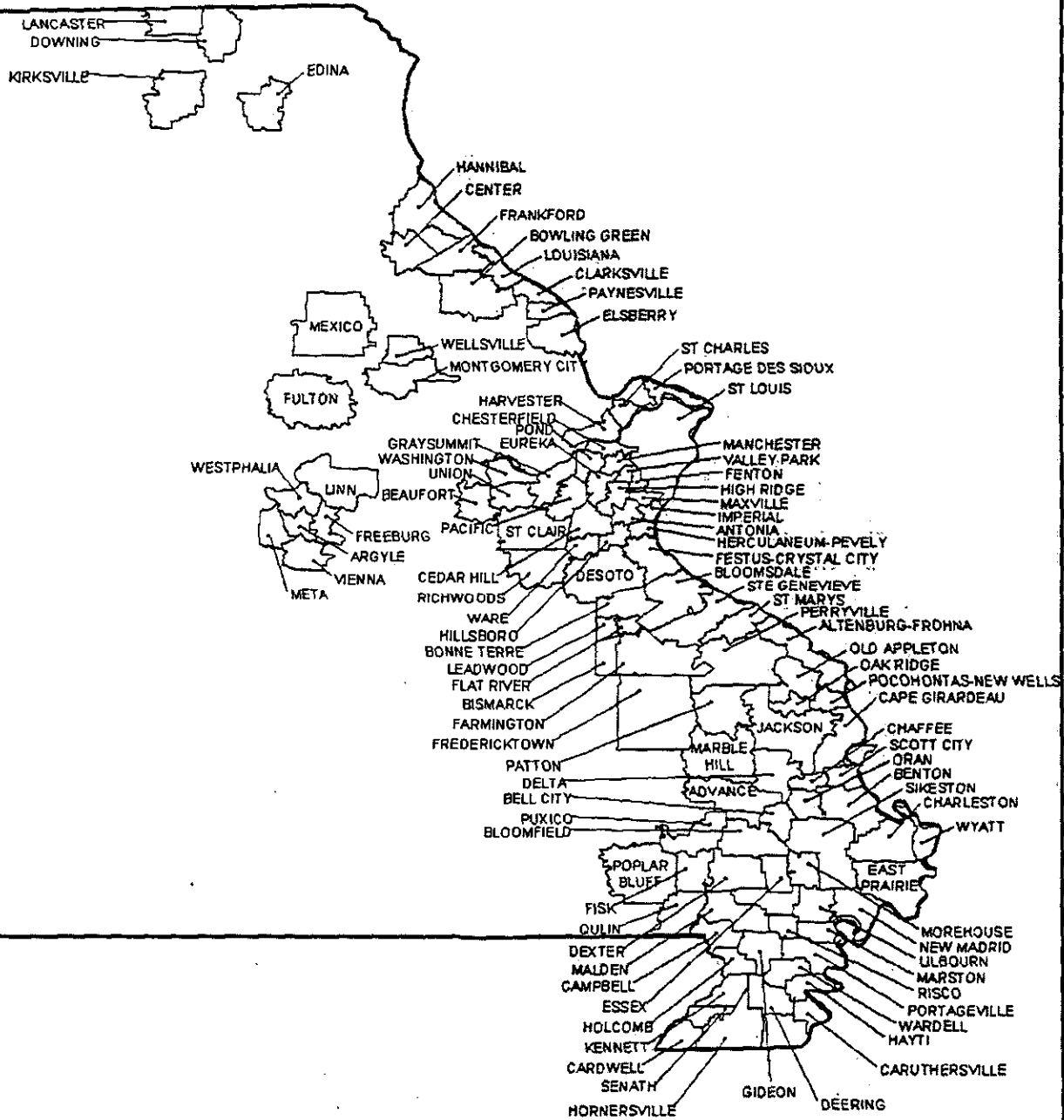
Publication Date: December 2000

Published Under Services: Wireless and Mobile
Communications

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

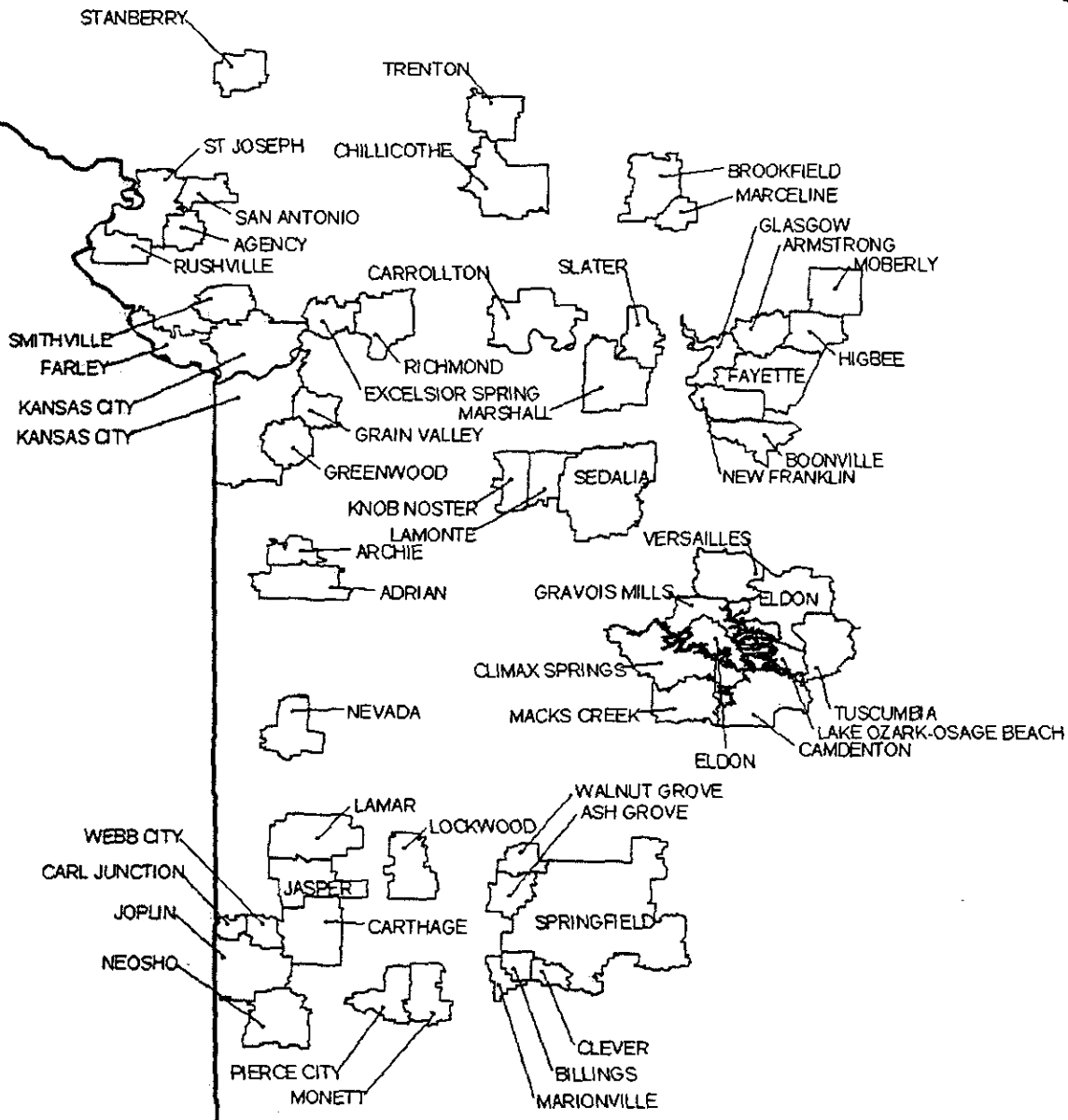
Missouri

Number of Residence CLEC Tariffs by Exchange

57 - 59
60 - 65



Southwestern Bell Exchanges



SBC Services, Inc.
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Missouri

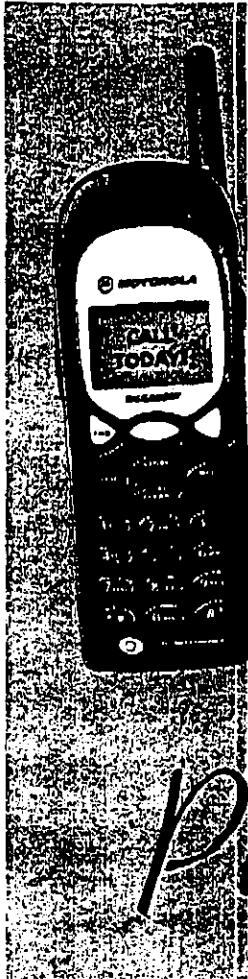
Number of Residence CLEC Tariffs by Exchange

57 - 59
60 - 65



FITE

Schedule 12



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MESSAGING

Send and receive short text messages

**NOKIA
5165**

Phone Shown
Actual Size

SCROLL

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

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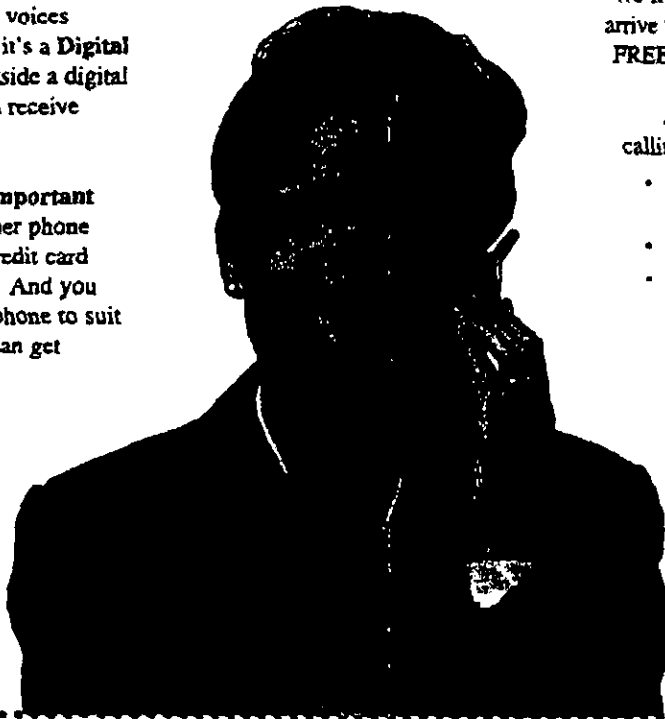
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- FREE AT&T Caller ID**

**Don't wait. Call today.
Be sure to ask about your
FREE Bonus!**



* 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.

** Refers to monthly charge. Use of Call Waiting incurs airtime, roaming and long distance charges.

Call 1 800 363-1366 to find out how your new Digital multi-network phone can be delivered tomorrow!

30-DAY TRIAL

We are so certain you will find this great Digital multi-network phone and AT&T Wireless to be everything we say they are, that if you're not completely happy with the phone you purchased, you may return your equipment within our 30-day trial period for a refund and pay only for the charges associated with the airtime you used. No questions. No hassles.

Call 1 800 363-1366

And get:

- FREE AT&T Caller ID so you don't have to pay for a call you don't want to take!
- FREE Call Waiting so you don't miss a call!



AN11213

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Schedule 13

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CAP

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\$69.99 - \$129.99

Expandable yet secure, these new 2.4 GHz cordless phones by V-Tech feature the latest in digital technology. Get the master base unit to control your system; then add up to 4 handsets throughout your home or office. Each V-Tech handset lets you add on links to the master base, and can be used to activate its functions so you can have a phone in every room even if there's no phone jack. Both the master base phone and add-on handsets are loaded with the latest features, including frequency hopping Spread Spectrum technology for secure transmission. Powered by AC adapter and NiMH rechargeable battery, included. 1-yr. limited manufacturer's warranty. Base—No. VT2431. Add-on Handset—No. VT2420. Imported.

Master base: 4-1/2Lx6-1/2Wx2-1/2D"
 Master handset: 6Lx2Wx1-1/4D"
 Add-on charger: 2Lx2Wx3D"
 Add-on handset: 6Lx2Wx1-1/4D"



Add-on handset must be used with master unit. It will not work by itself.

Master base features:

- Alphanumeric call waiting/caller ID*
- 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.

Schedule 13

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

Quantity

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RELATED ITEMS



Prepaid Phone
Cards
\$6.99 - \$26.99



Panasonic 2.4 GHz
Gigarange Cordless
Phone & Answering
System
\$179.99



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CAR

[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	<input type="text" value="1"/>
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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VTECH
19⁹⁹
Extra Special Value, each
800MHz cordless phone.
Available in 3 Colors. No other.

SONY PSYC
49⁹⁹ Low Price
Personal CD player.
Color row design with ESP
ShadySound electronic
skip protection. Available in
red, white and blue.
No other.

SONY PSYC
79⁹⁹ Low Price
CD boom box
with digital AM/FM tuner and remote
control. Available in blue or red.
No other.

NEW AT TARGET!

FUJI
99⁹⁹ Sale
Zoom Drive 100
35mm compact
with 7.2 (24-107mm)
zoom lens. Also features
red-eye reduction,
date/time stamping
and self-timer.

FUJI
279⁹⁹ Low Price
Finepix 2300
digital camera
with 2.1 megapixel
resolution and 2.0
digital zoom. Includes
USB SmartMedia card.
Full digital memory card assembly at Target.

SONY
99⁹⁹ Low Price
4-head Hi-Fi VCR with front-loading, Auto
Eject, and Auto Pause/Play/Still/Stop/Still/Stop
functions.

RCA
169⁹⁹ New at Target! DVD player with CD, CD-R, CD-RW
and MP3 playback. Features 5-video and 1000-song
search and write control. No other.

PANASONIC
189⁹⁹ Sale
DVD player with VCD, CD, CD-R, CD-RW and MP3
playback. Includes 5-video and 1000-song search
and remote control. No other.

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V-TECH
19⁹⁹
Extra Special Value, each
900MHz cordless phone.
Available in 3 colors. No. VT9111.

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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 include

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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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.

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](#)

May We Also Suggest



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

\$9.84[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.
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 Phon
Card, 250 Minutes****\$25.00**[Add to Cart](#)**Shipping & Handling Information**

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

Additional Product Info**Model No.**

AT&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

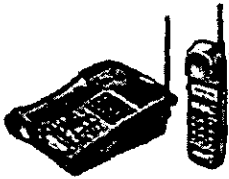
Imported

Components Country of Origin

Imported

9

Cordless w/Answ. Machines



SPP-A972

\$149.95

sony style

electronics

900MHz

Digital




Sony's SPP-A972 2-Line Digital 900MHz Cordless Phone with Digital Answering Machine features two-line operation, 900MHz for extended range, Log Dial®, Digital Security, 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.

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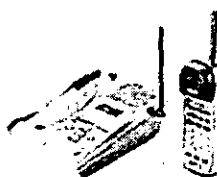
[add to cart](#)

			
SPP-A2480	SPP-A2470	SPP-A972	SPP
\$199.95	\$179.95	\$149.95	\$12

Model: SPP-A972 900MHz Cordless Phone with Digital Answering Machine | Price: \$149.95 | Availability: In Stock | Shipping: Free Shipping | Return: 30-Day Return Policy

Cordless w/Answ. Machines

sony style



electronics



800-800-8000

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 Interfer 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

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sony style

Corded/Feature

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electronics

Want to know who is calling... Sony's IT-D20 Caller ID Telephone will tell you. This product features Caller ID with Call Wait Number Directory, a 20 Number Caller ID Memory, and a Backlit LCD Display. You can 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 800-874-7669 Sony's IT-D20 Corded Telephone with Caller ID and Call Wait Number Directory. IT-M804 IT-M704 IT-M602 IT-E. ©2001 Sony Electronics Inc. All rights reserved.

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