

1Q 2006

By John Barrett, Director of Research, and Vibha Pant, Analyst

| Synopsis   | Interest (Worldwide) in Unlimited Telephone Service   |
|--|---|
| This report analyzes<br>the VoIP technology<br>trends including the<br>rise of PC-PC<br>telephony, wireless<br>VoIP, and the<br>increasing market<br>presence of the cable<br>providers. Using Parks<br>Associates' latest<br>consumer survey data,<br>this report sheds light<br>on the consumer's<br>attitude towards VoIP,<br>gauges demand, and<br>addresses the<br>decision-making<br>economics underlying<br>the switch to VoIP. | Willingness to Pay for an<br>Unlimited Telephone Service (Q2/05)         "How much would you be willing to spend each month for a telephone<br>service for your home with unlimited local and long distance"<br>(Among Internet Households)         Australia (n=814)       \$39         Italy (n=912)       \$38         U.S. (n=1,099)       \$36         Spain (n=777)       \$34         Canada (n=956)       \$31         U.K. (n=860)       \$30         India (n=332)       \$30         France n=911)       \$12         Japan (n=802)       \$18         Taiwan (n=747)       \$17         South Korea (n=913)       \$11         China (n=694)       \$9         \$20       \$25       \$30         Source: Global Digital Living       \$15       \$20       \$25       \$30         \$20       \$25       \$30       \$45 |
| Publish Date: Feb 06   | "eBay's acquisition of Skype has renewed the industry's interest in VoIP and<br>shifted the focus from the telephone to the home computer," said John<br>Barrett, director of research with Parks Associates. "Nonetheless, the real<br>action in the market will continue to be in the 'invisible' VoIP services people  |

use without being consciously aware of them."

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| The Bottom Line is a  | 2.0 Overview  |
| concise, executive-<br>level summary of the<br>current state of the<br>market, evolutionary<br>path, and the<br>implications for<br>companies doing<br>business in this space.<br>A Parks Associates'<br><b>Resource Book</b><br>contains a wealth of<br>consumer survey data | <ul> <li>3.0 Services &amp; Providers <ul> <li>3.1 VoIP Service Providers</li> <li>3.2 VoIP Services</li> <li>3.3 Pricing</li> <li>3.4 Features</li> <li>3.5 Video VoIP</li> </ul> </li> <li>4.0 Consumer Demand for VoIP Services <ul> <li>4.1 VoIP Users</li> <li>4.2 Demand for VoIP Services—Stand-alone Services</li> <li>4.3 Demand for VoIP Services—Bundled Services</li> <li>4.4 Bundled Service Segments</li> </ul> </li> </ul> |
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# **Digital Voice Communications in the Home**

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|                        | Verizon: RBOC MSO Overlap<br>Verizon Communications, Inc. VoIP Service<br>VoiceGlo Financial Overview<br>VoiceGlo VoIP Service<br>VoicePulse VoIP Service<br>Vonage Financial Overview<br>Vonage Subscriber Base<br>Vonage VoIP Service<br>Yahoo! Financial Overview |
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