



Top 20 U.S. Yellow Pages Markets 2008

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- Atlanta
- Austin, TX
- Boston
- Buffalo, NY
- Charleston, SC
- Chicago
- Dallas
- Denver
- Jacksonville, FL
- Kansas City
- Las Vegas
- Los Angeles
- Manhattan
- Miami
- Minneapolis/St. Paul
- Phoenix
- Sacramento, CA
- San Francisco
- Seattle

Chapter 4: Profiles of Leading Metro Market Publishers

- Ambassador Media Group
- AT&T Advertising & Publishing
- Idearc Media
- R.H. Donnelley
- Valley Yellow Pages
- White Directory Publishers
- Yellowbook

Abstract



Top 20 U.S. Yellow Pages Markets 2008 is the premier source for reliable insight to past, present and future trends shaping the yellow pages metro markets in the U.S.

Top 20 U.S. Yellow Pages Markets 2008 is an inside look at the segment of the industry that was the exclusive territory of incumbent publishers until Yellow Book announced it was going into the Manhattan market in 1999, the same year Manhattan's Ambassador Publishing was formed. Today, independents hold a nearly 30% revenue share in the markets; a share growing larger every year.

The report also covers a whole new segment of metro markets: The Spanish-language directory.

The report uncovers information affecting mergers & acquisitions, rates and trends, as well as usage research, competitive business strategies, and revenue and market share projections shaping the marketplace.

Top 20 U.S. Yellow Pages Markets 2008 arms decision makers an effective solution for benchmarking success, sizing up revenues, pinpointing what's driving investment activity, spotting growth opportunities and much more!

Sample Pages



Los Angeles

Population: 3,849,378
(4.2% increase from 2000)
Median Household Income,
2006: \$44,445

At a Glance: Los Angeles

Print revenue, 2007: [REDACTED]
Print revenue, 2008P: [REDACTED]

Leading Publishers

AT&T Advertising & Publishing: [REDACTED]
Idearc Media: [REDACTED] core market rev
Yellowbook: [REDACTED] core market rev

Market Description

Los Angeles is a very crowded market

AT&T holds the largest market share b
Greater Los Angeles with 1.2 million c
AT&T publishes an additional 16 direct

generating a majority of its sales thro
trade division remains small by compar
including adult trade books, Warner
dictionaries, Peterson Field Guides, Th
Kingfisher Books, Houghton Mifflin Ch
Clarion Books. The children's division, i
generating a majority of its sales thro
trade division remains small by compar
including adult trade books, Warner
dictionaries, Peterson Field Guides, Th
Kingfisher Books, Houghton Mifflin Ch
Clarion Books. The children's division, i
largest backlist of children's literature
The Lord of the Rings, Jaffara and The
be quite successful for the company as
Harcourt failed to repeat the success, f
pulling in annual revenue of about \$2.5

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Table 2.2:
Publishers' Share of Revenue from Top 20 Markets, 2007-2008P
(Revenue in millions)

| | 2007 | | | 2008P | | |
|-------------|---------------|---------------|--------------|---------------|---------------|--------------|
| | Total Revenue | Metro Revenue | % of Revenue | Total Revenue | Metro Revenue | % of Revenue |
| Ambassador | 500.0 | 500.0 | 100.0% | 500.0 | 500.0 | 100.0% |
| AT&T | 1,200.0 | 900.0 | 75.0% | 1,200.0 | 900.0 | 75.0% |
| Donnelley | 1,200.0 | 900.0 | 75.0% | 1,200.0 | 900.0 | 75.0% |
| Idearc | 1,100.0 | 800.0 | 72.7% | 1,100.0 | 800.0 | 72.7% |
| Valley | 100.0 | 80.0 | 80.0% | 100.0 | 80.0 | 80.0% |
| White | 100.0 | 80.0 | 80.0% | 100.0 | 80.0 | 80.0% |
| Yellowbook* | 1,200.0 | 900.0 | 75.0% | 1,200.0 | 900.0 | 75.0% |

*Fiscal year ended March 31
Sources: Simba Information, company financials

Leading Publishers in the Metro Market Arena

Among the publishers in the metro world, Yellowbook distributes directories in the most markets at 15, followed by Idearc with 12 and AT&T at 10. Revenue comparisons for the leading publishers in 2007 and 2008 are shown in Table 2.2.

dictionaries, Peterson Field Guides, Taylor Guides, The Best American Series, Kingfisher Books, Houghton Mifflin Children's Books, Walker Learning Books, and Clarion Books. The children's division, comprised of the latter four, holds one of the largest backlists of children's literature and includes such titles as Curious George, The Lord of the Rings, Jaffara and The Polar Express. The Polar Express proved to be quite successful for the company as a tie-in to the 2004 film, but Houghton Mifflin Harcourt failed to repeat the success, stumbling from 2005 onward, though still pulling in annual revenue of about \$2.5 billion.

Ambassador Media Group

New York, NY
Metro market revenue: [REDACTED] million

dictionaries, Peterson Field Guides, Taylor Guides, The Best American Series, Kingfisher Books, Houghton Mifflin Children's Books, Walker Learning Books, and

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