Opportunities for publishers in China and Asia Pacific

Publishers Forum

Berlin, May 2011
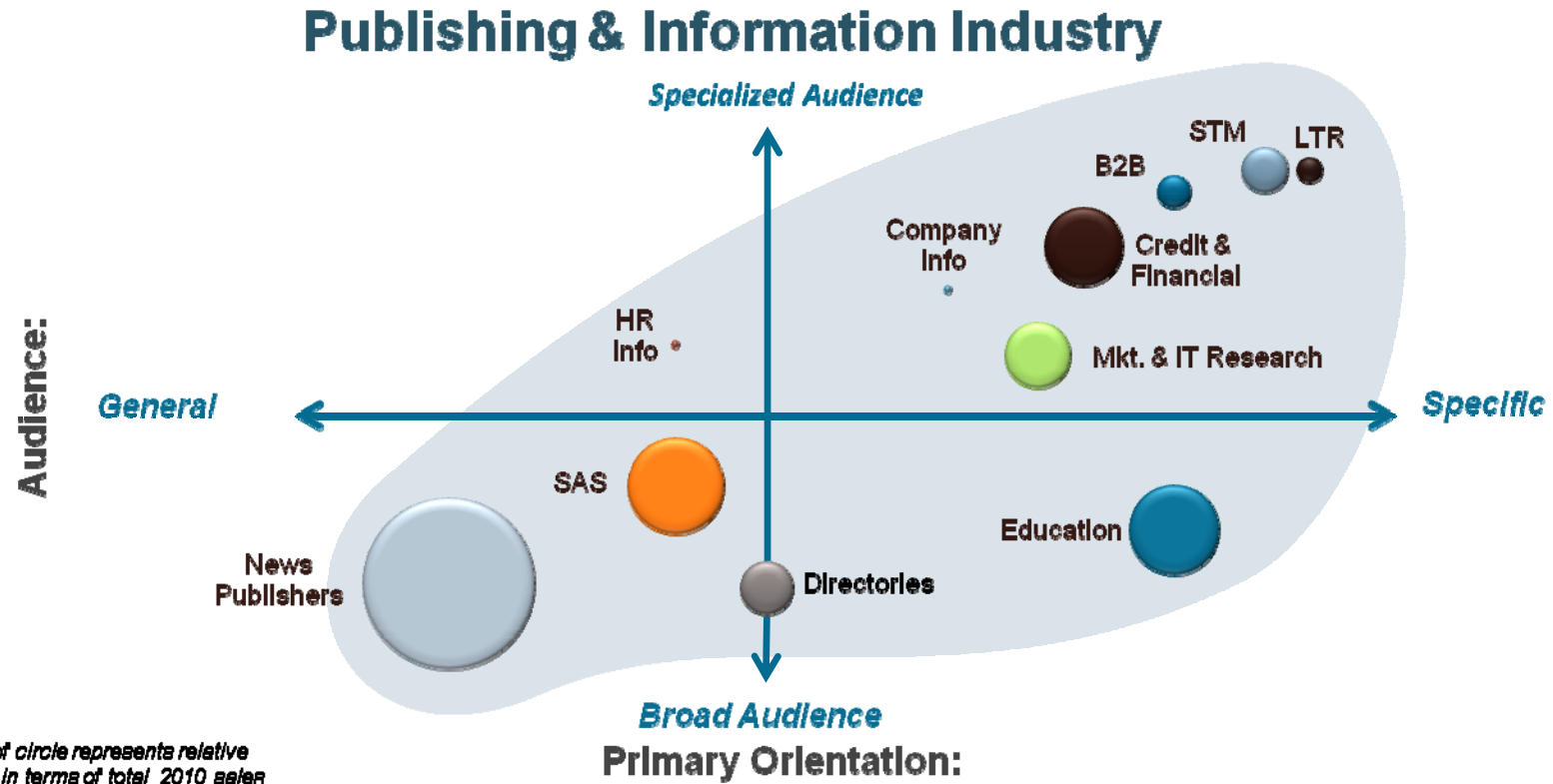
David R Worlock

Co-Chair, Outsell Leadership Programs
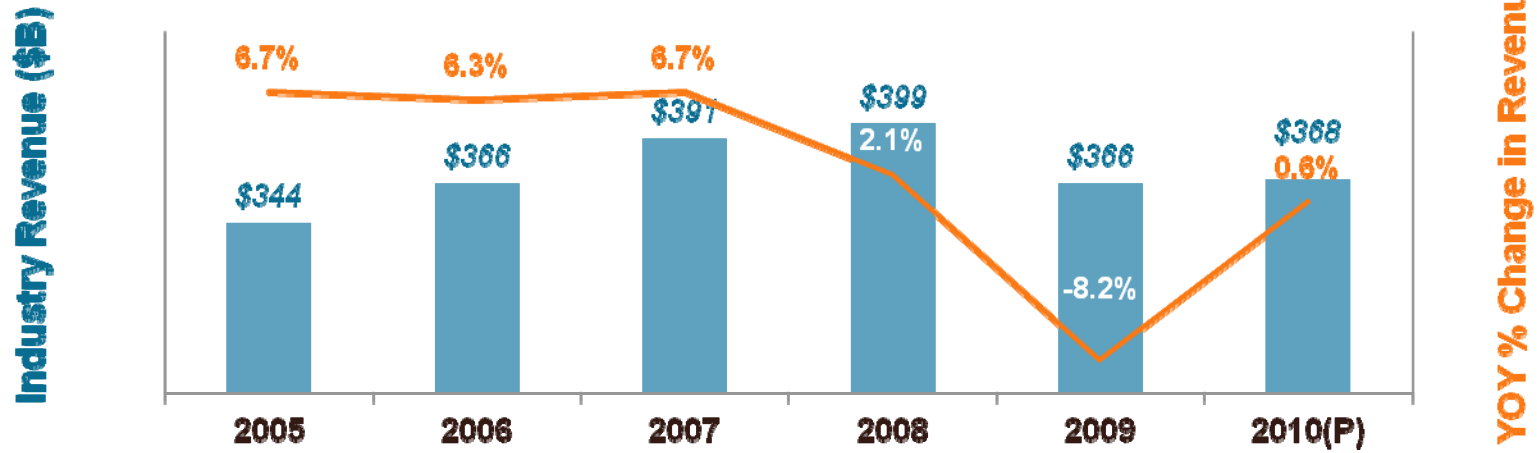
OUTSELL

Industry Ecosystem

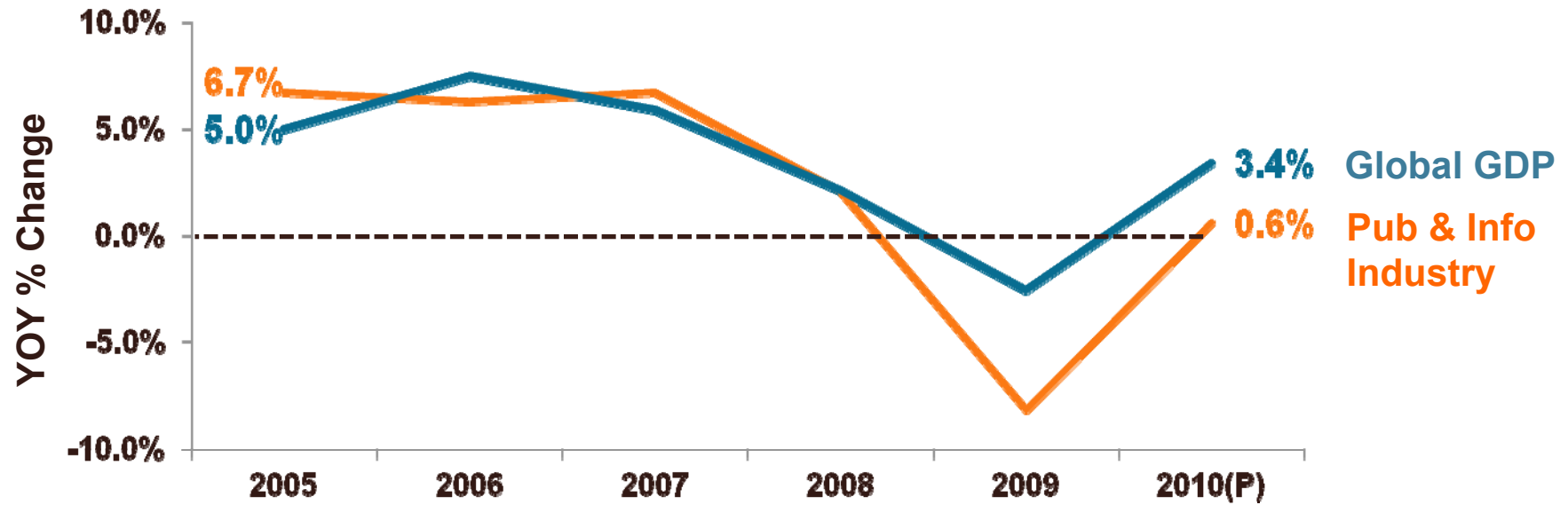## Publishing & Information Industry

Audience: General ← → Specific

Primary Orientation: Specialized Audience (top) ← → Broad Audience (bottom)

STM, LTR, B2B, Company Info, Credit & Financial, HR Info, Mkt. & IT Research, SAS, News Publishers, Directories, Education

Note: Size of circle represents relative market size in terms of total 2010 sales

Industry Performance

Global Publishing & Information Industry

Industry Revenue ($B) / YOY % Change in Revenue

Year	Revenue	YOY % Change
2005	$344	6.7%
2006	$366	6.3%
2007	$391	6.7%
2008	$399	2.1%
2009	$366	-8.2%
2010(P)	$368	0.6%

Industry Performance

Global Industry & GDP Growth

Line chart showing YOY % Change from 2005 to 2010(P). Global GDP (blue) starts at 5.0% in 2005; Pub & Info Industry (orange) starts at 6.7% in 2005. Both dip in 2009, with Global GDP reaching about -2.5% and Pub & Info Industry reaching about -8%. By 2010(P), Global GDP rises to 3.4% and Pub & Info Industry rises to 0.6%.

Industry Performance

Global Publishing & Information Industry

YOY % Change

- **9.4%**
- **5.0%**
- **2.7%**

- **3.4%** Global GDP
- **3.0%** Excluding News
- **-6.0%** News

2005 2006 2007 2008 2009 2010(P)

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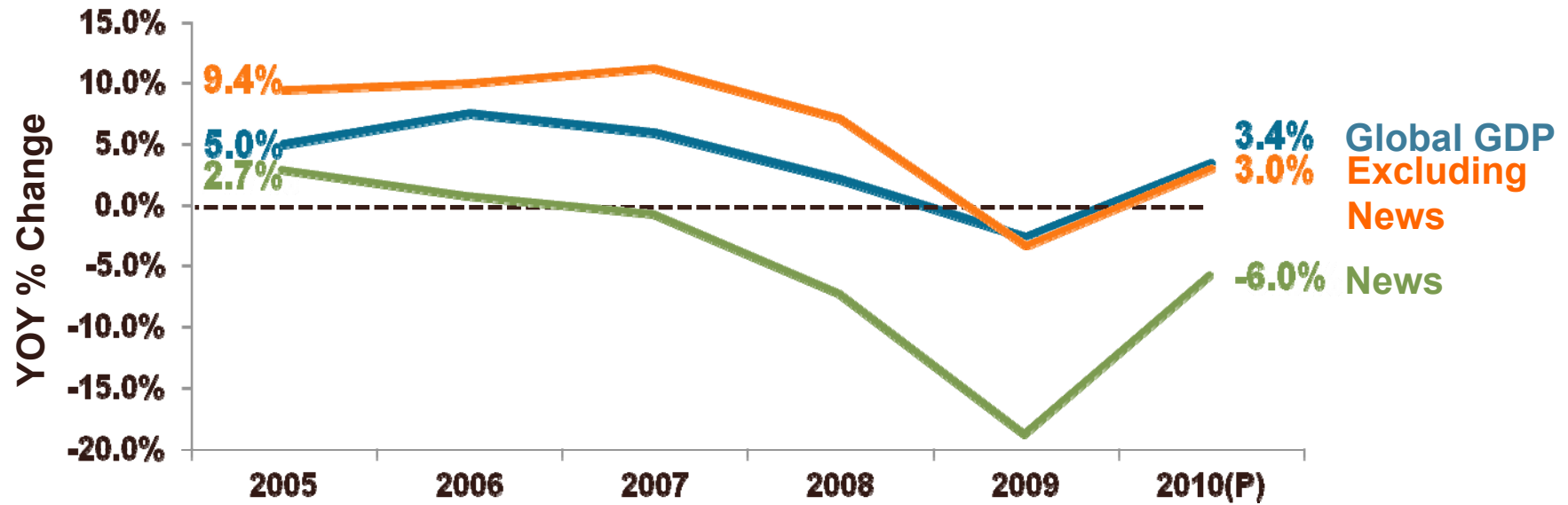
Industry Drivers…

Global

Mobile

Social

Solutions

Global Expansion

Global Publishing & Information Industry

U.S. — $168B — 46% — -1.0% CAGR*

EMEA — $104B — 28% — +1.2% CAGR*

Asia Pacific — $81B — 22% — +7.1% CAGR*

Other Americas — $16B — 4% — +4.9% CAGR*

Key
2010 (P) Revenue — Region's Share of Global Revenue
CAGR*
* 2005 to 2010
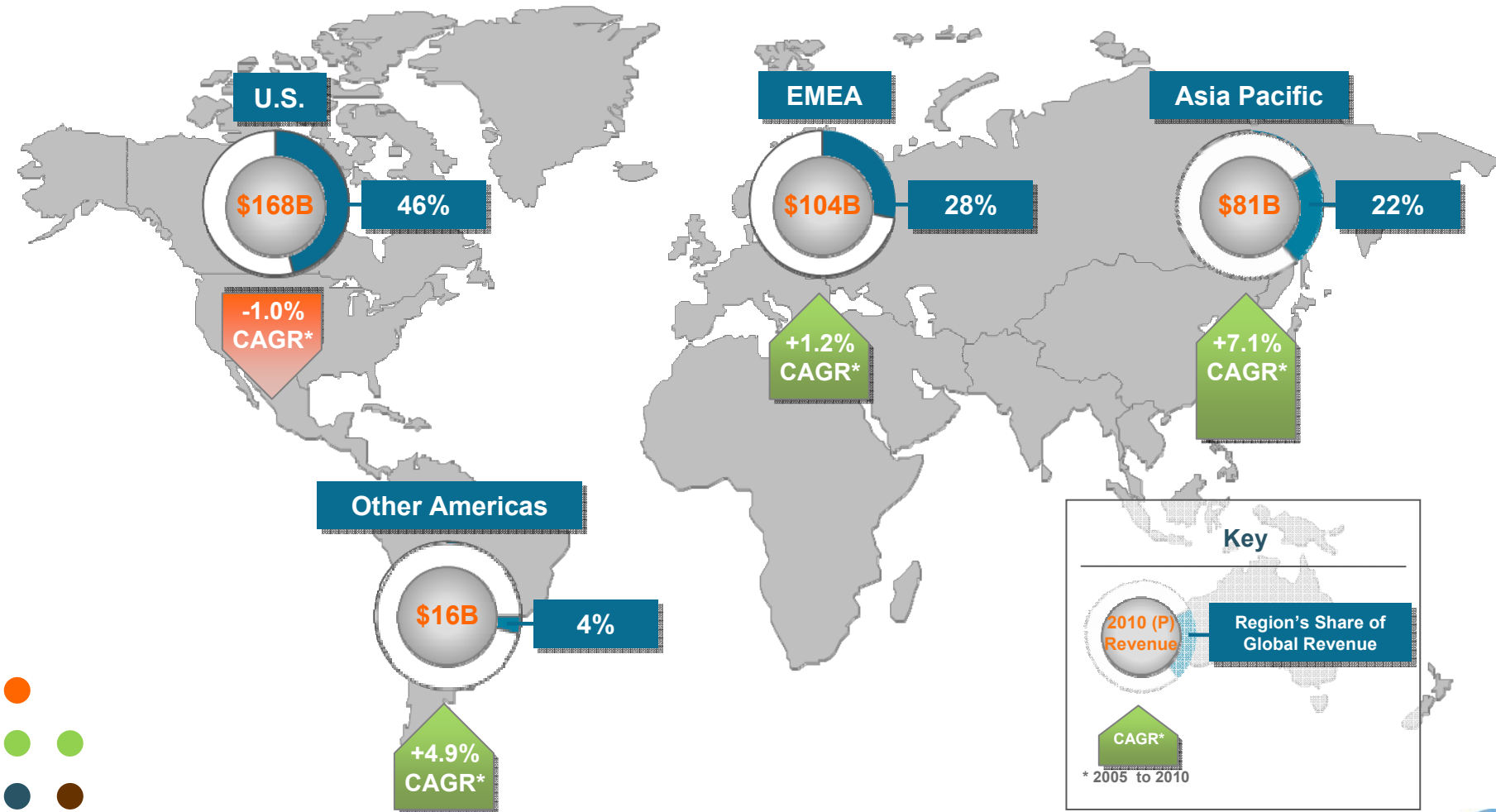
Global Growth Across Segments

Average Revenue Growth (CAGR % 2005-10)

	United States	Other Americas	EMEA	Asia Pacific
SAS	13.2	13.9	18.7	18.4
STM	7.8	-10.0	9.1	5.5
C&F	2.9	0.2	9.4	10.5
Mkt. & IT Res	3.0	6.6	6.3	10.4
E&T	5.0	10.3	2.3	6.9
LTR	3.0	-8.5	5.6	15.2
B2B	-0.6	-5.3	-1.5	5.3
News	-23.3	9.5	-11.4	4.7
TOTAL	-1.0	4.9	1.2	7.1
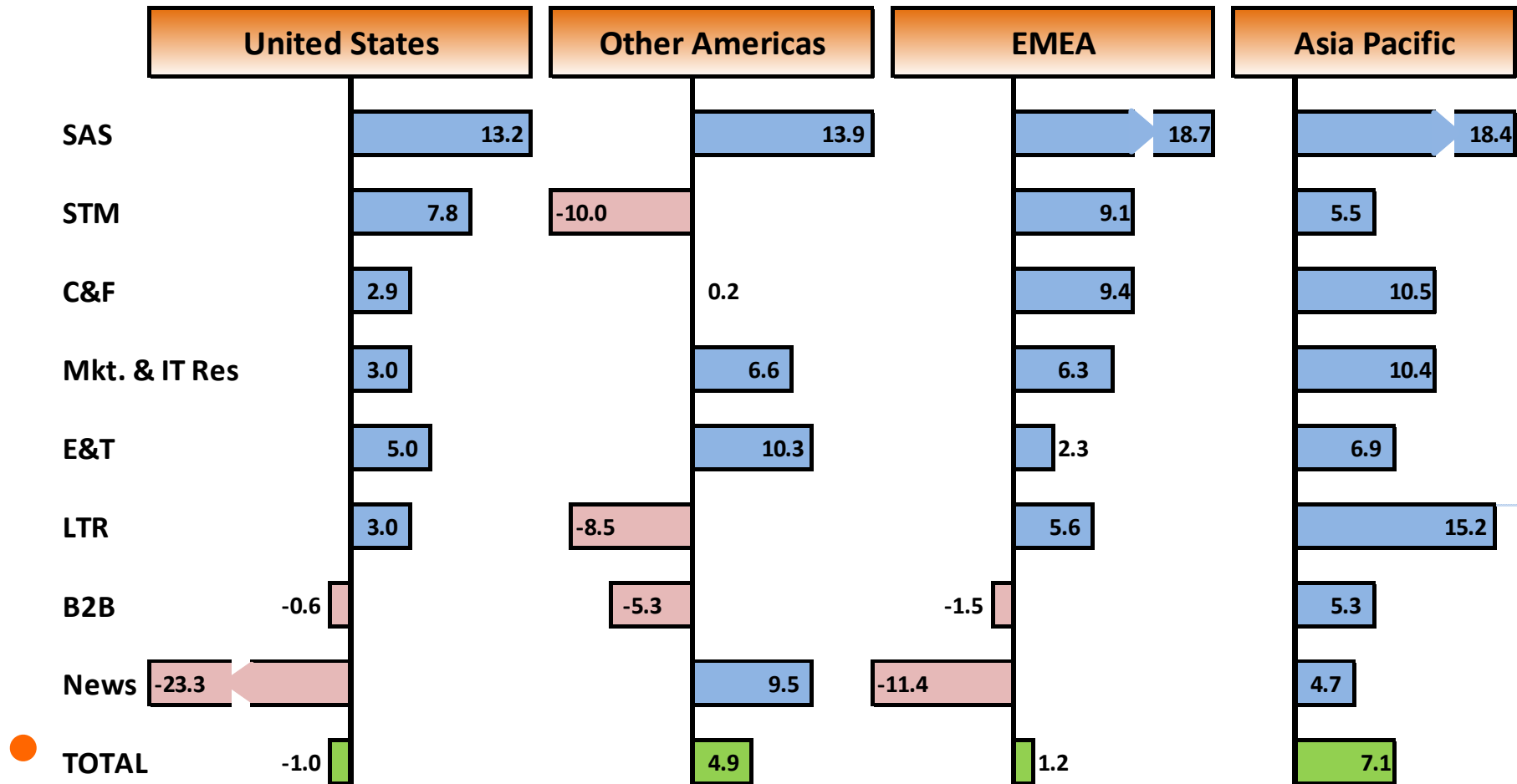
Social, Mobile, Solutions

Social
Community

+

Mobile
Experience

+

Solutions
Workflow

Mobile Workflows

Big Data + Extreme Analytics

Customized Solutions

Essential Actions
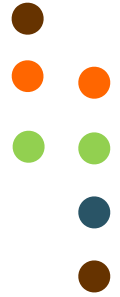
- **Develop Platforms, Not Products**

- **Perform at Industry Benchmarks or Better**

- **Invest in Web and Customer Analytics**

- **Help Make Money, Save Money, or Mitigate Risk**

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