



Market & Competitive Outlook

Outsell's Signature Event
September 22, 2008



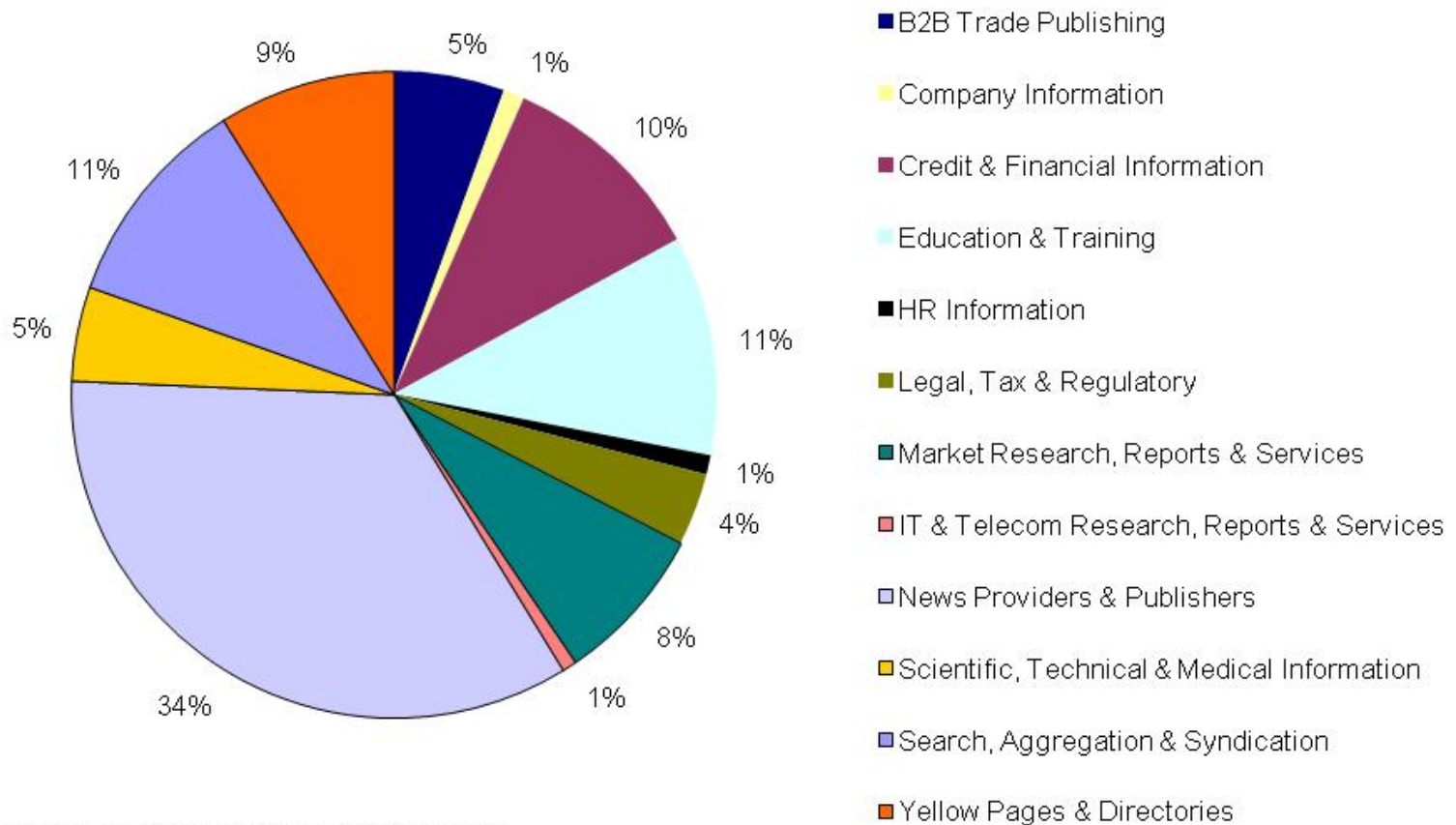
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Continued Outlook

- **Fair today**
- **Fair tomorrow**
- **Partly cloudy**
- **Slight winds out of the west**

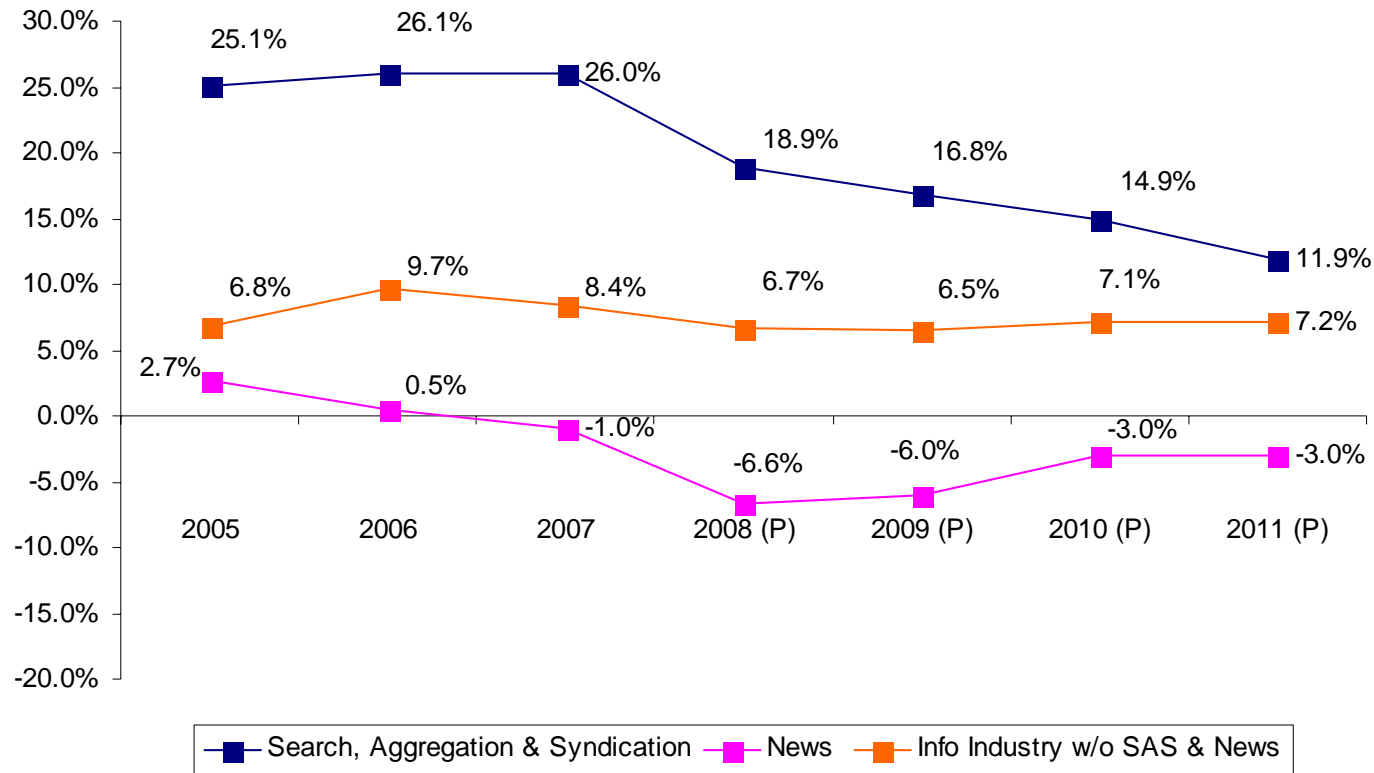
Barometer & Benchmarks

2007 Information Industry-\$390 Billion



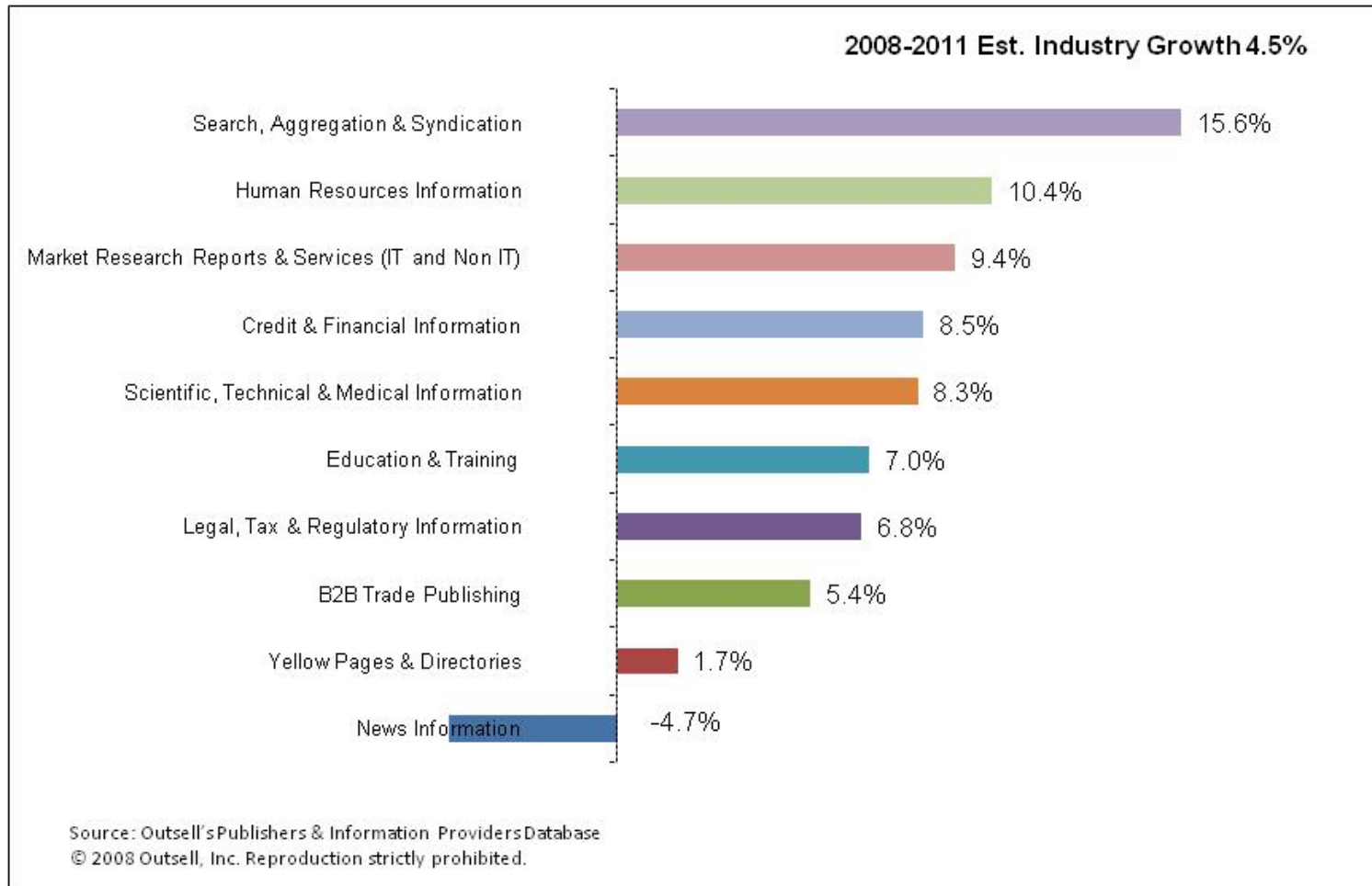
Source: Outsell's Publishers & Information Providers Database
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2008 Information Industry Forecast

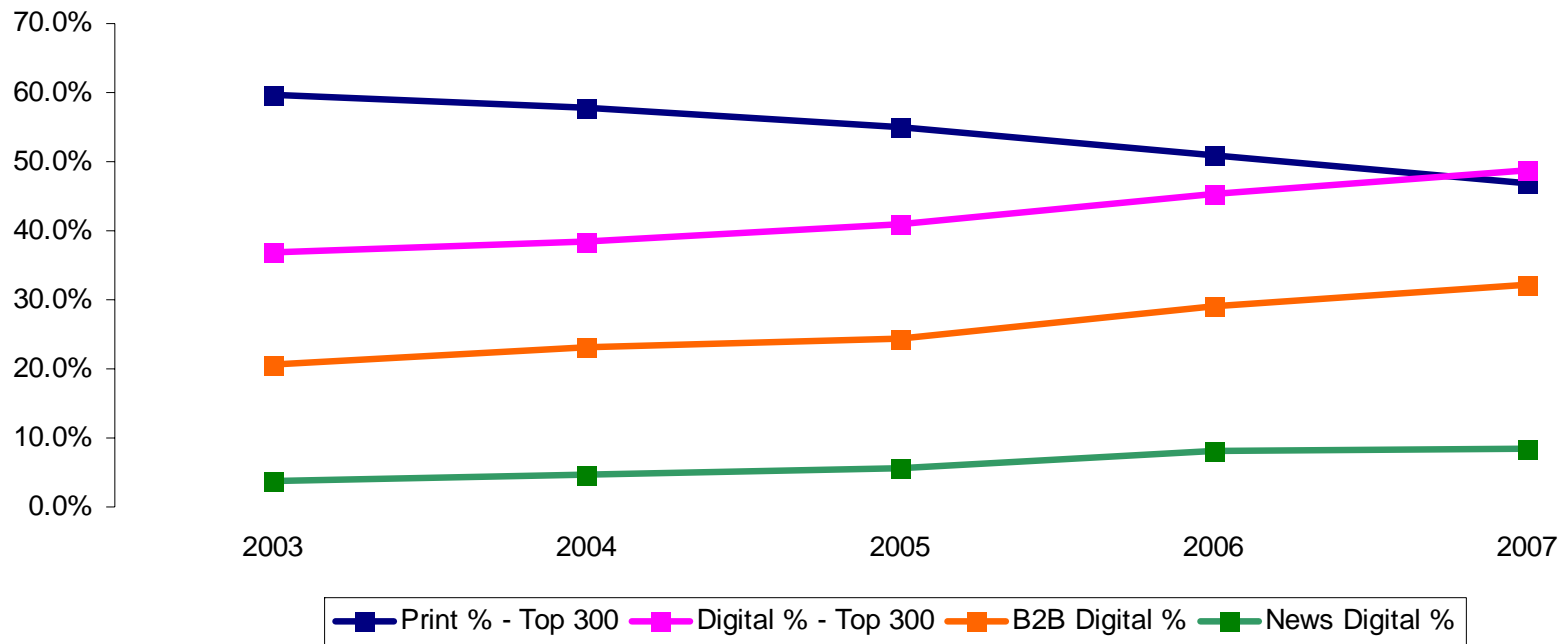


Source: Outsell's Publishers & Information Providers Database

2008-2011 Forecast

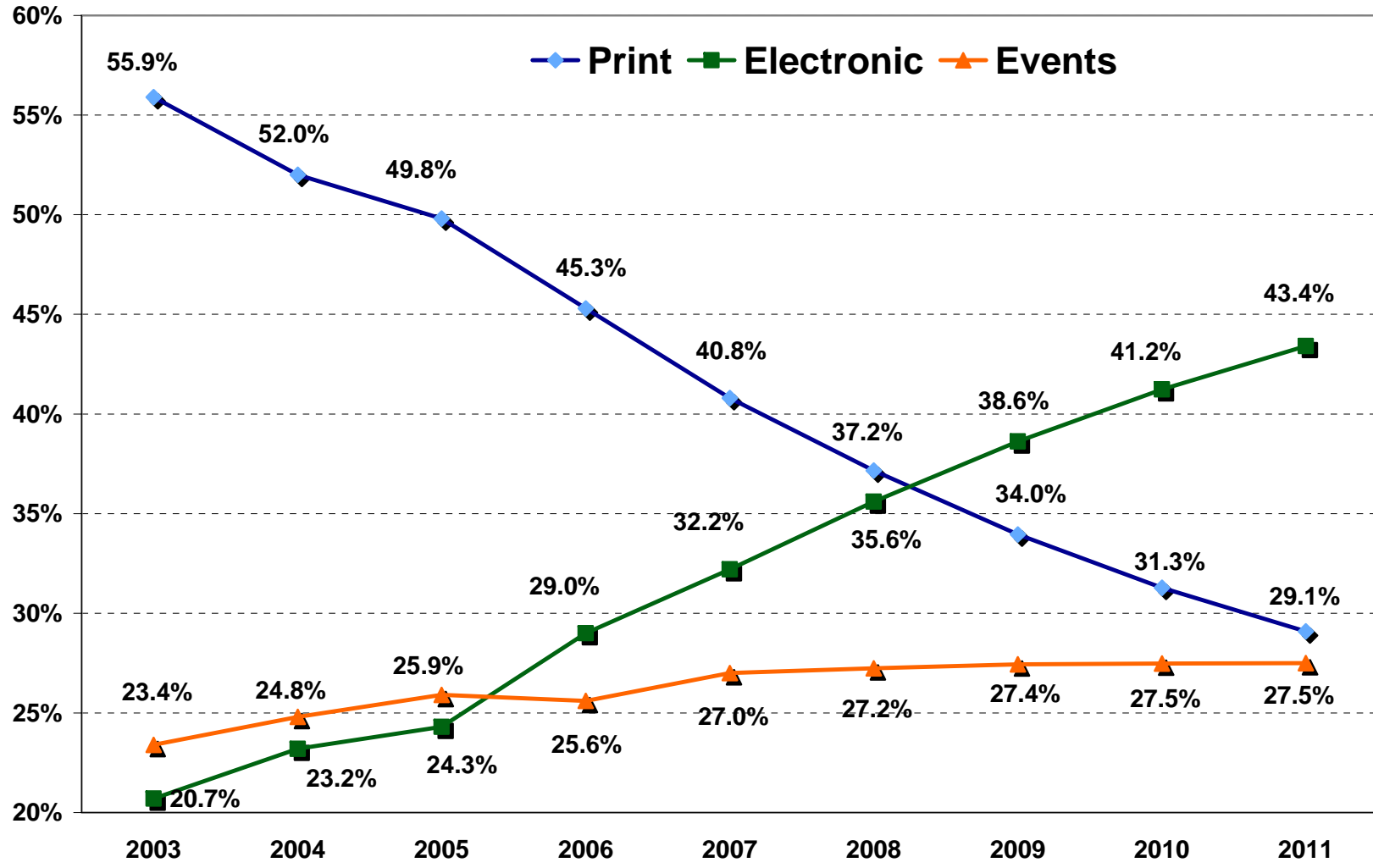


Print vs. Digital

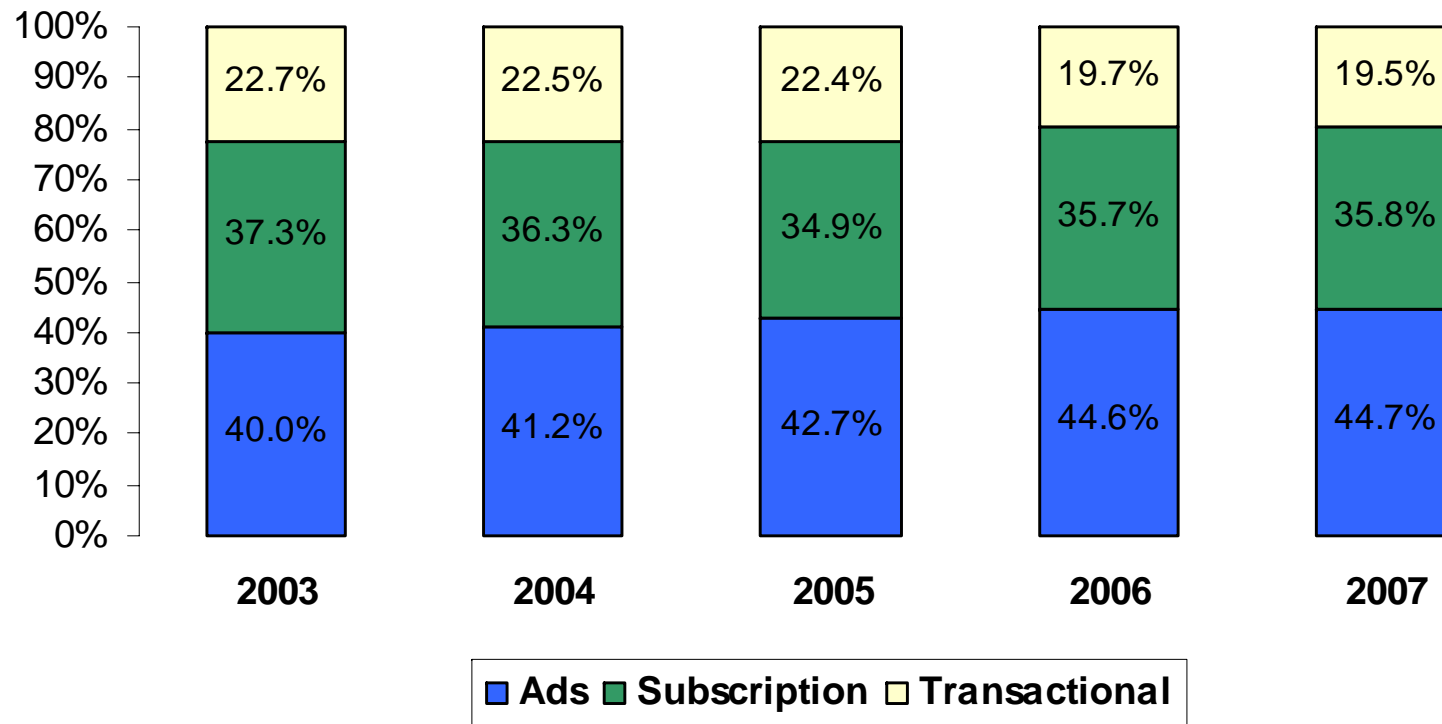


Source: Outsell's Publishers & Information Providers Database

B2B Trade Total Revenue Media Mix



Top 300 Revenue Model Mix



Source: Outsell's Publishers & Information Providers Database

Metrics

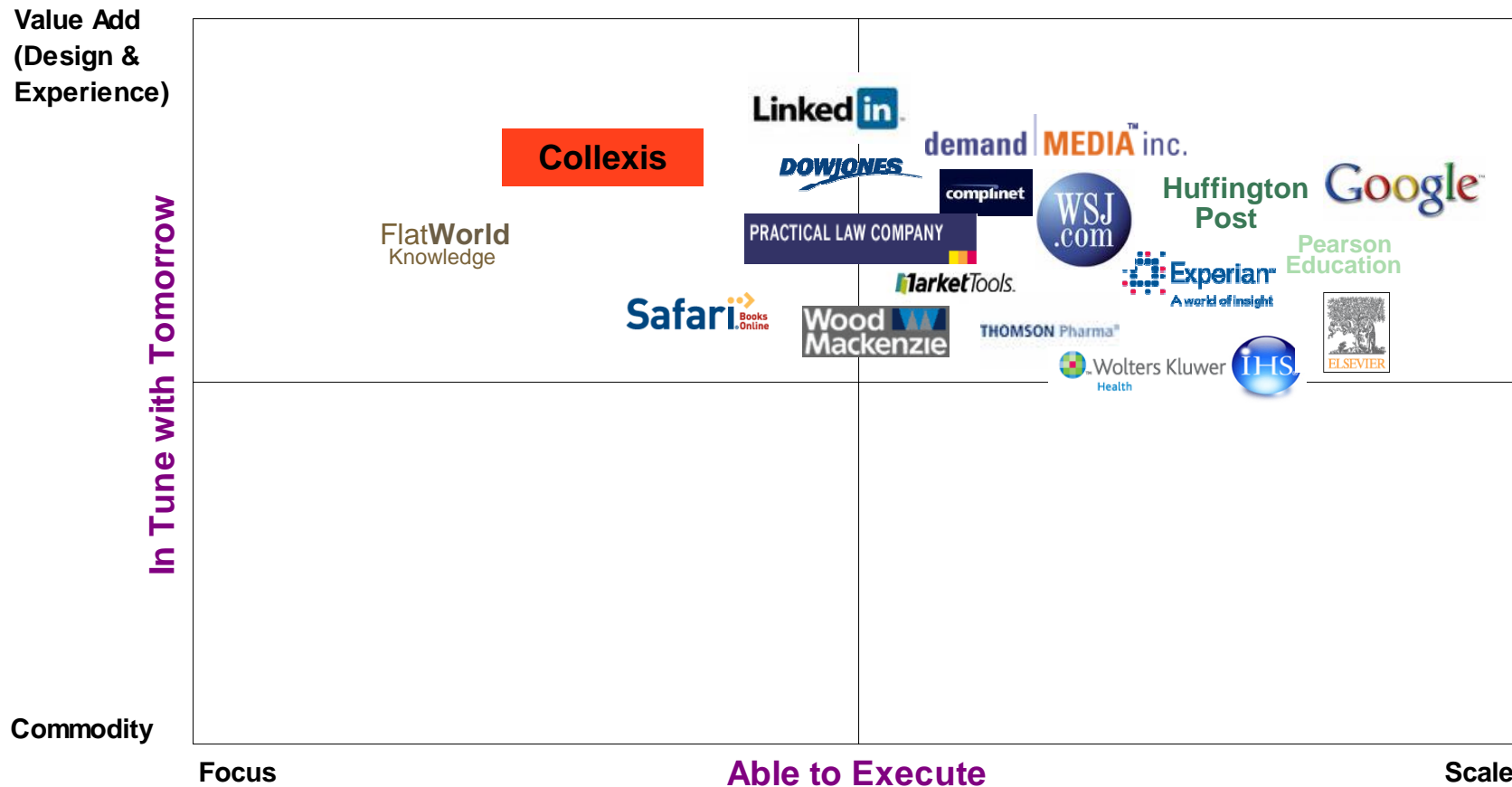
- **10% average revenue growth 2008**
- **\$212k revenue per employee**
- **13% revenue from new products**
- **New product cycles - 2-9 months**

Continued Outlook

1. Slower growth
2. Asia and EMEA+
3. Online ads set pace
4. Content + Software + Community = Workflow & Process Reinvention
5. Growth in 'personal' content – iPhone Kindle - raise bar
6. Search recedes/web 3D
7. More business model experiments & M&A
software & content
research & media
8. More open everything
9. Market Share Muscle
10. Design & experience the new value-add

Innovation

Outsell LeaderBoard - Innovators



Source: Outsell's Publishers & Information Providers Database

Ownership

- **75% CEO/COO or Unit GM**
- **Yet only 2 respondents have P&Ls with product managers**

Ideation

- **51% ad-hoc/opportunistic**
- **Drivers:**
 - revenue growth
 - keeping up with customer needs
 - vs. competitive disruption or up-to-date design

Agility

70% rely on market research

vs. client beta, observations, web analytics, communities of users--all indicators of agile

Technology

- **93% software/web/mobile enabled**
- **Yet 56% corporate IT is combined with product IT**
- **Managing technology a challenge**

Funding

- **Prioritizing and lack of funding big issues**
- **Yet 52% have 0-2% R&D budgets**

Innovation: Essential Actions



"IT'S A NEW DESIGN TO SAVE WATER."

Come By and Visit Us

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