



UK
BUSINESS
MEDIA

THIS PRESENTATION

- THE BUSINESS INFORMATION SECTOR IN THE UNITED KINGDOM
- KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP





BUSINESS INFORMATION

UK



THE BUSINESS INFORMATION SECTOR IN THE UNITED KINGDOM

£15.5bn

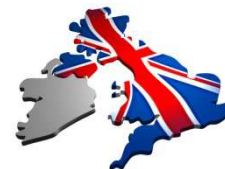
Total size of the UK business
information market

THE BUSINESS INFORMATION SECTOR IN THE UNITED KINGDOM

UK-generated revenues equivalent to

0.4%

of Gross UK GDP



THE BUSINESS INFORMATION SECTOR IN THE UNITED KINGDOM

UNITED KINGDOM IS ONE OF THE MAJOR PLAYERS:

1. UNITED STATES (£23.3bn)
2. UNITED KINGDOM (£15.5bn)
3. GERMANY (£13-15bn)*
4. JAPAN (£10bn)*
5. CHINA*

*Outsell estimate. Figures for US and UK confirmed as of 2013

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THE BUSINESS INFORMATION SECTOR IN THE UNITED KINGDOM

70,000

Estimated number of people employed
in the business information sector in the UK

THE BUSINESS INFORMATION SECTOR IN THE UNITED KINGDOM

80,000

Estimated number of people employed in non-UK locations by UK-domiciled business information companies

THE BUSINESS INFORMATION SECTOR IN THE UNITED KINGDOM



to



UK to UK

£2.87b

n



to



ROW to UK

£3.52bn



to



UK to ROW

£9.15b

n



THE BUSINESS INFORMATION SECTOR IN THE UNITED KINGDOM



For every **£7** of revenue, **£6** is derived from data services, decision-support tools, and workflow solutions

THE BUSINESS INFORMATION SECTOR IN THE UNITED
KINGDOM

£2.1bn*

revenue from in-person events

*14% of total



PPA BUSINESS



BUSINESS INFORMATION UK

OUTSELL ™

KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP



KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

100
Member
Companies



The average PPA Business Member saw revenue growth of **9%** between 2012 and 2013

KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

90%

of PPA Business members
reported a profit in 2013

Source: PPA Publishing Futures 2013



The average profit margin
of a
PPA Business member is just
under

20%

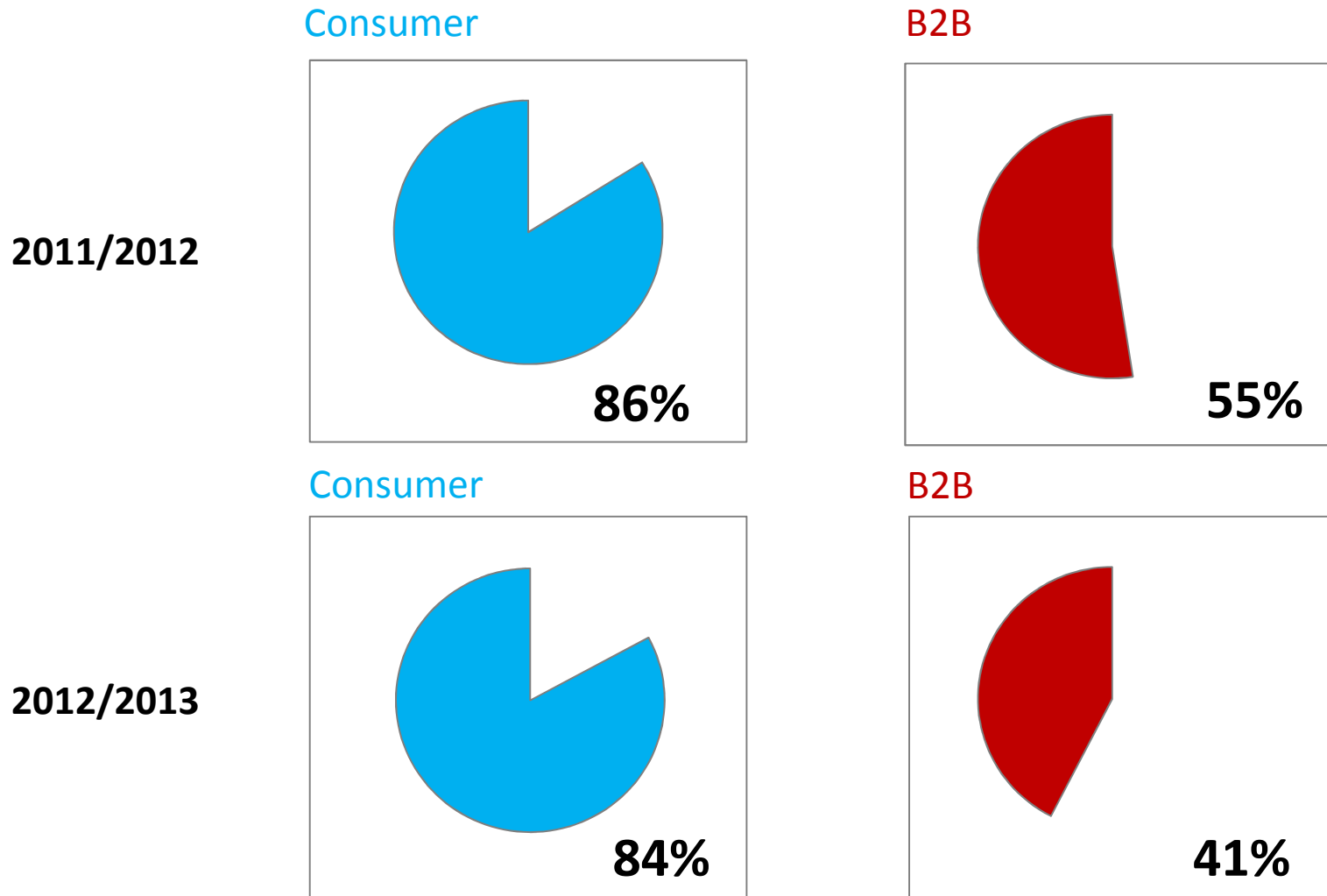


KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

Last year, I showed you this slide...



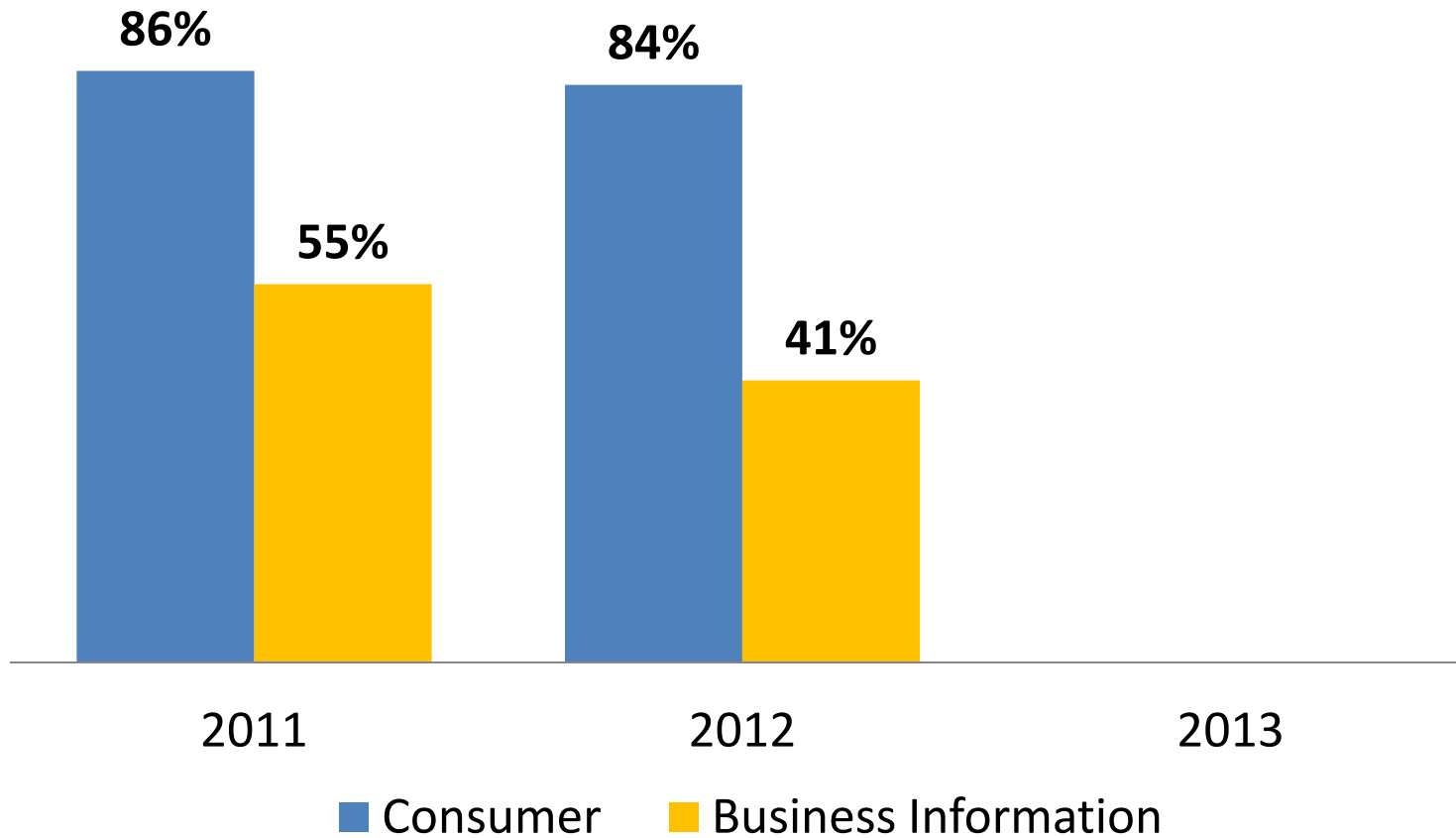
% Print Revenue



Source: PPA Publishing Futures 2011/2012 & 2012/2013

KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

% of revenue derived from printed products



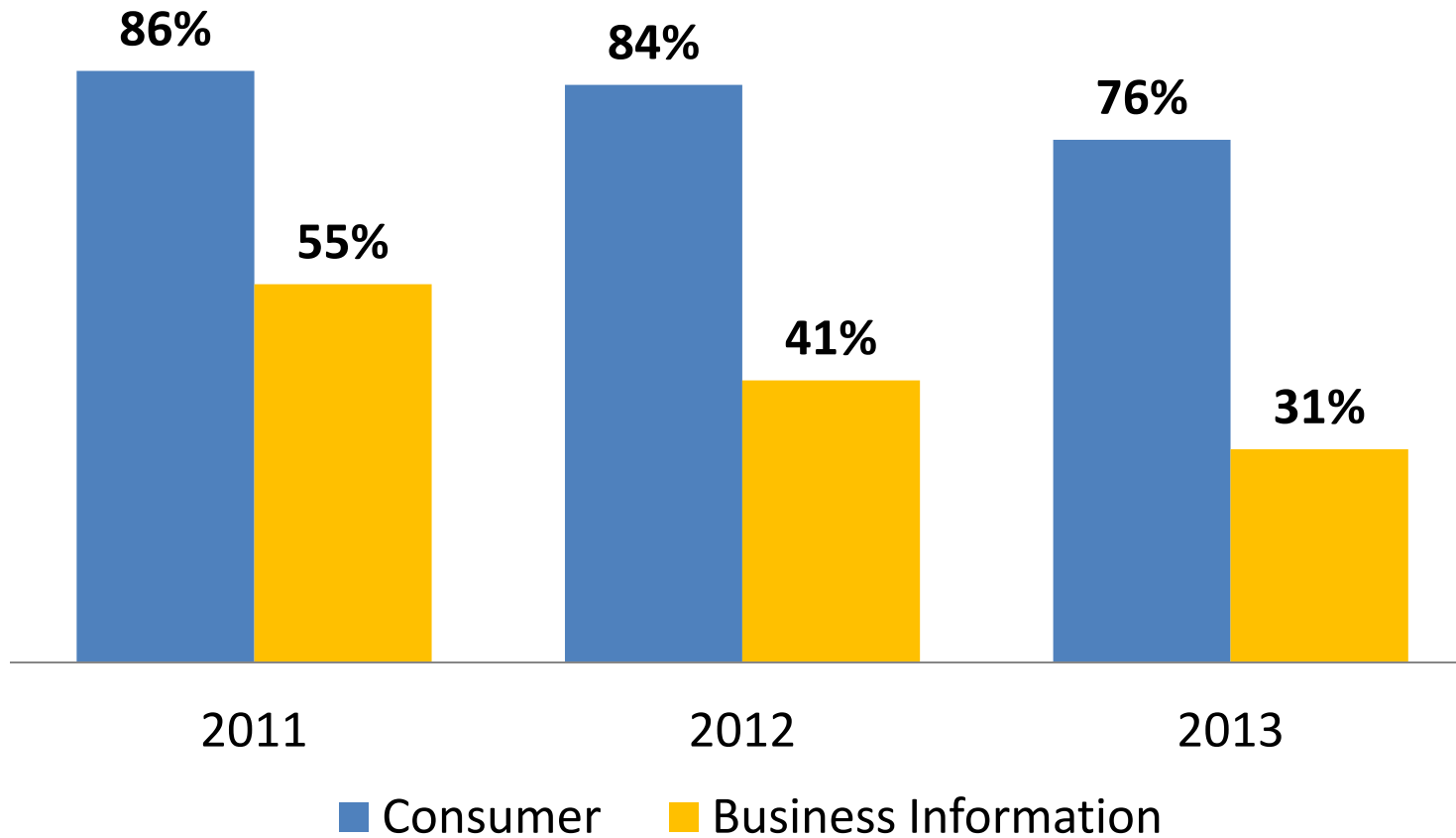
Source: PPA Publishing Futures 2013/2014



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KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

% of revenue derived from printed products



Source: PPA Publishing Futures 2013/2014



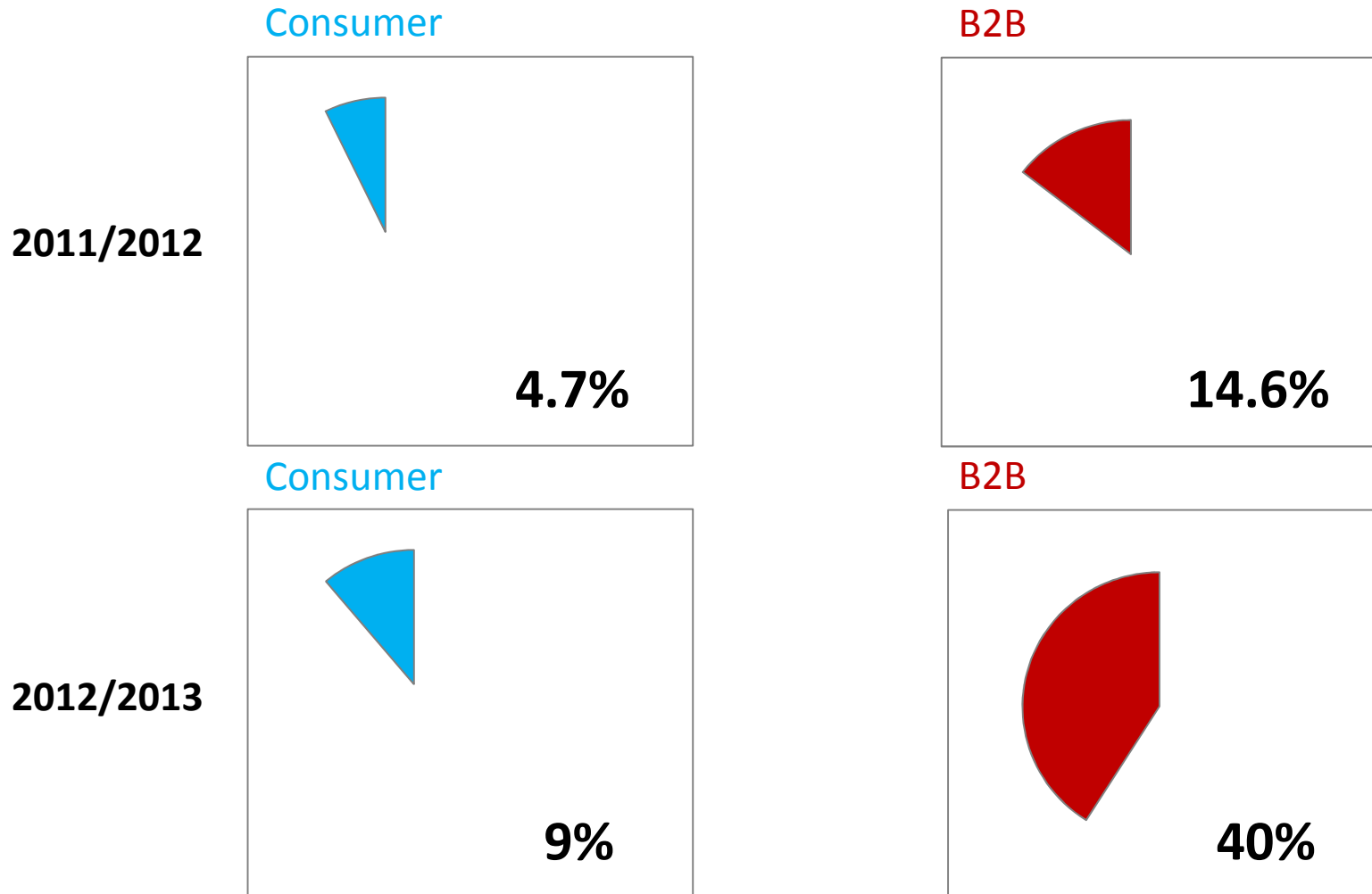
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KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

I also showed you this one...



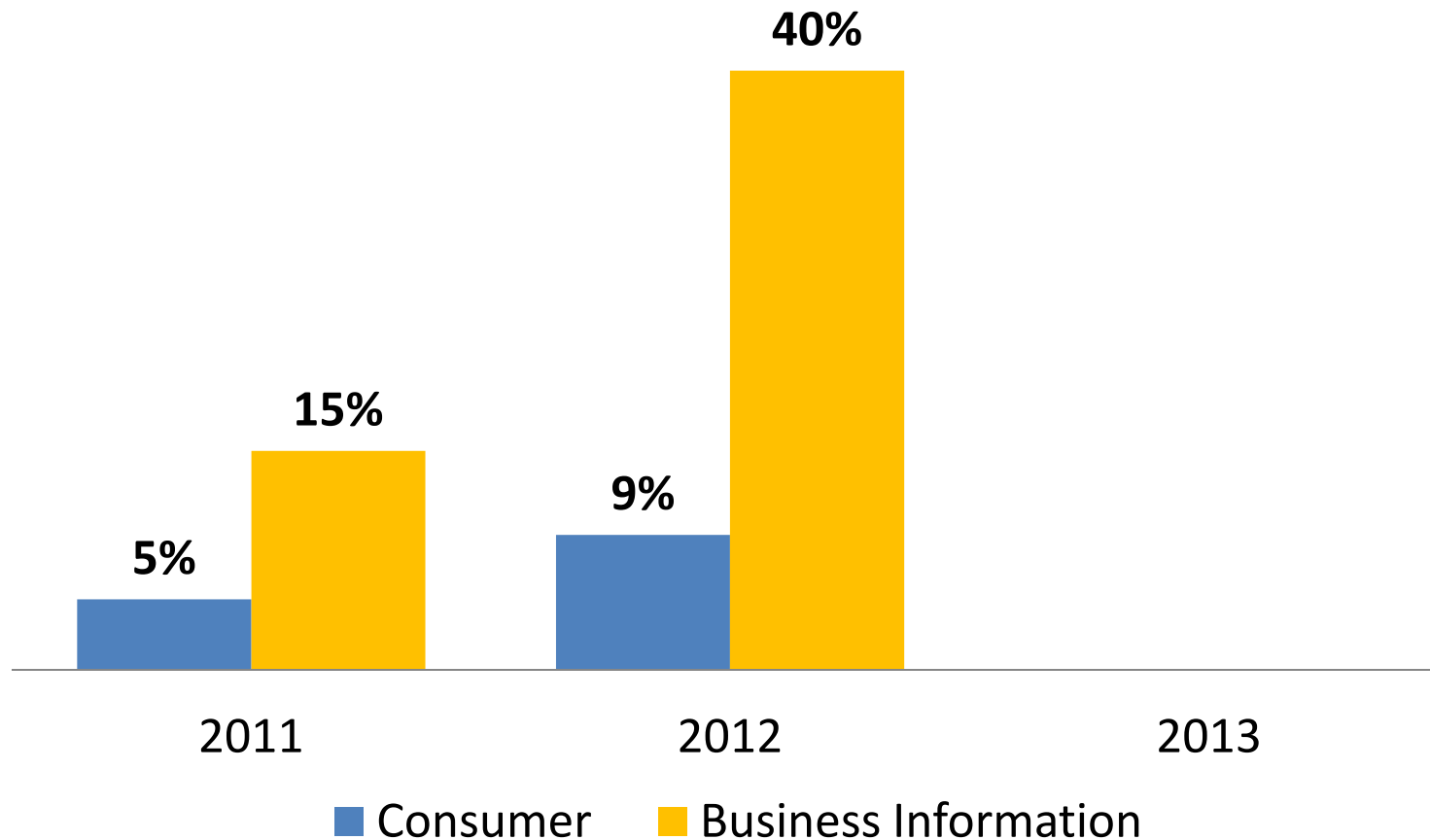
% Digital Revenue



Source: PPA Publishing Futures 2011/2012 & 2012/2013

KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

% of revenue derived from digital products

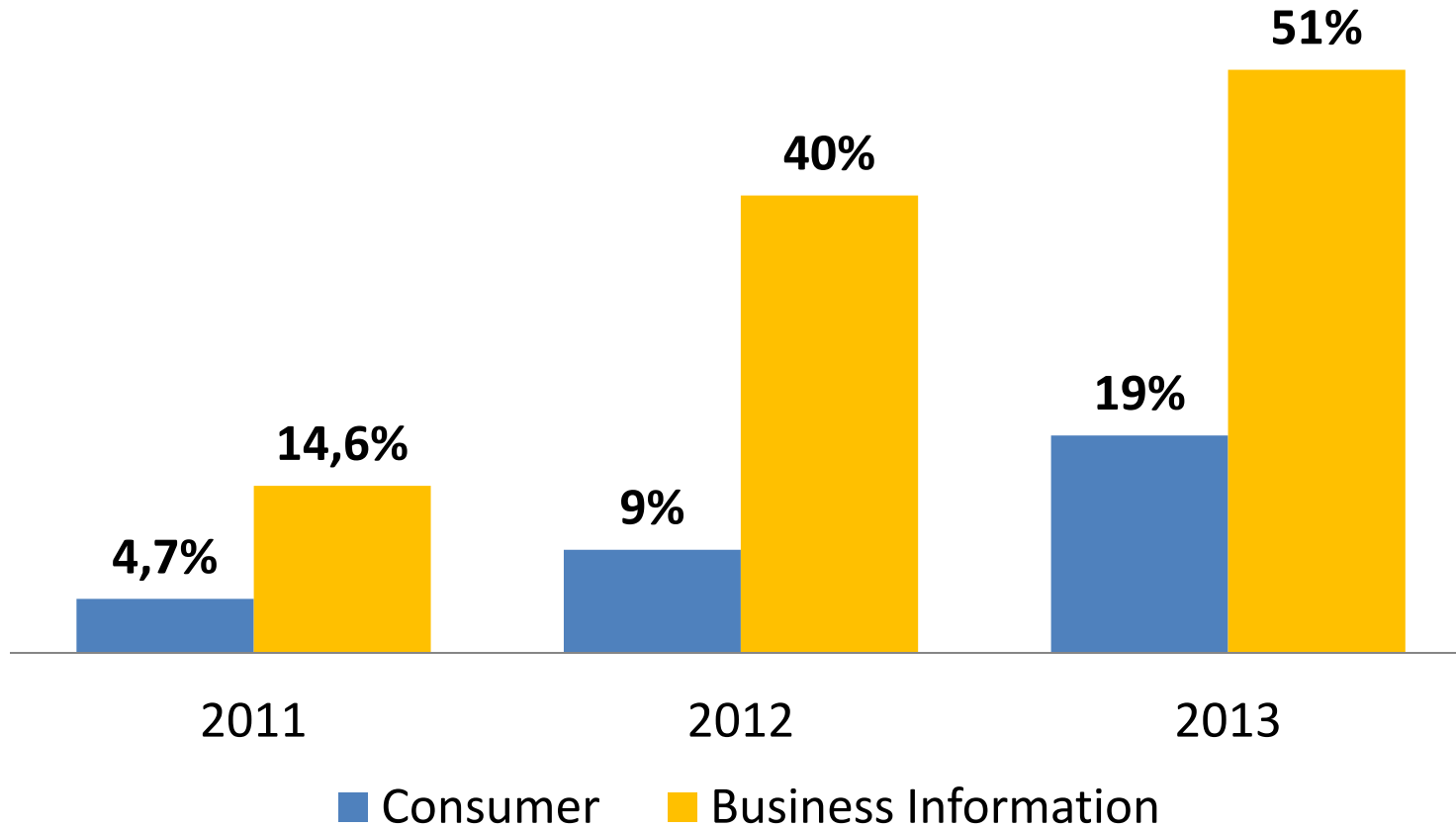


Source: PPA Publishing Futures 2013/2014



KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

% of revenue derived from digital products



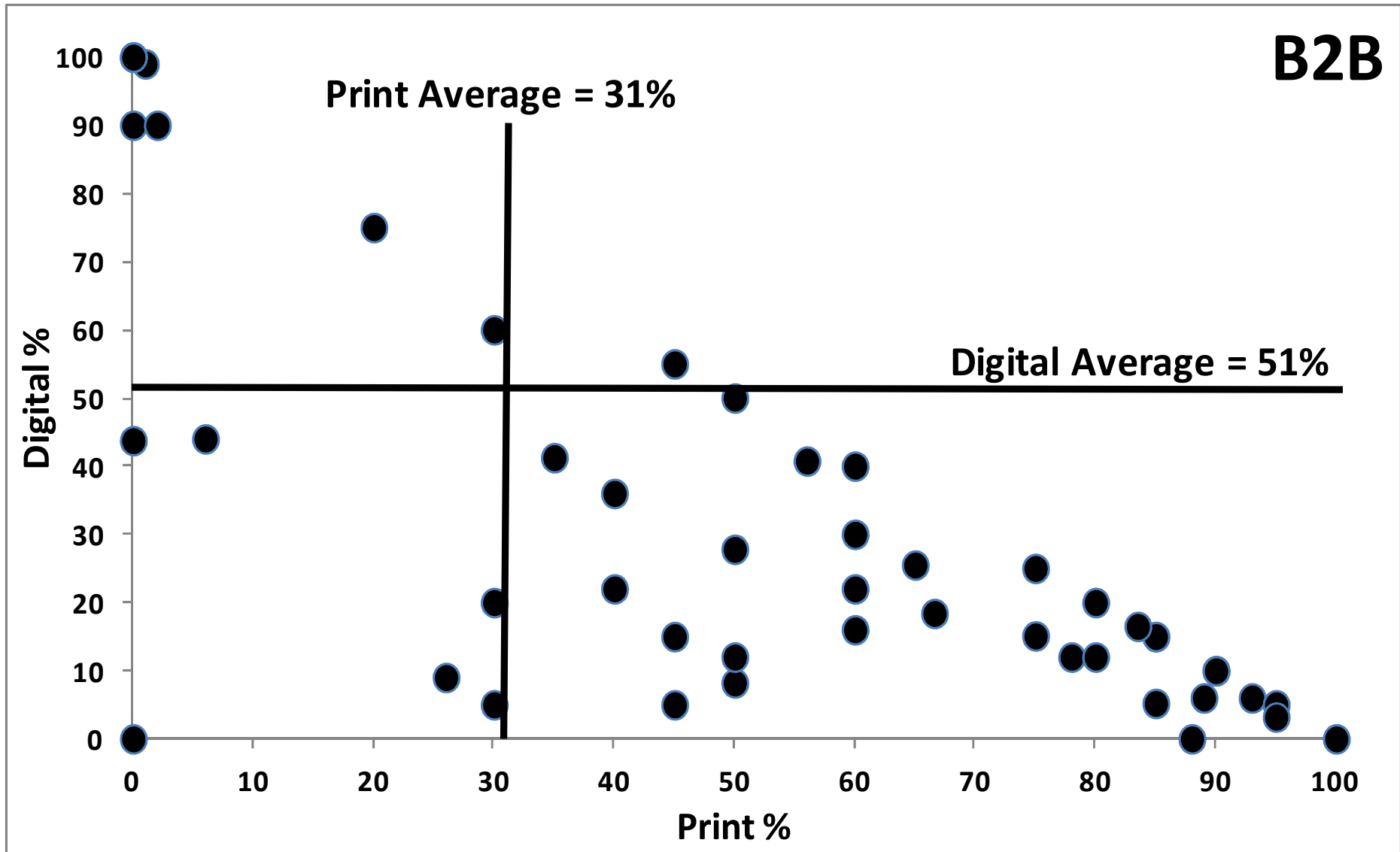
Source: PPA Publishing Futures 2013/2014



PPA BUSINESS

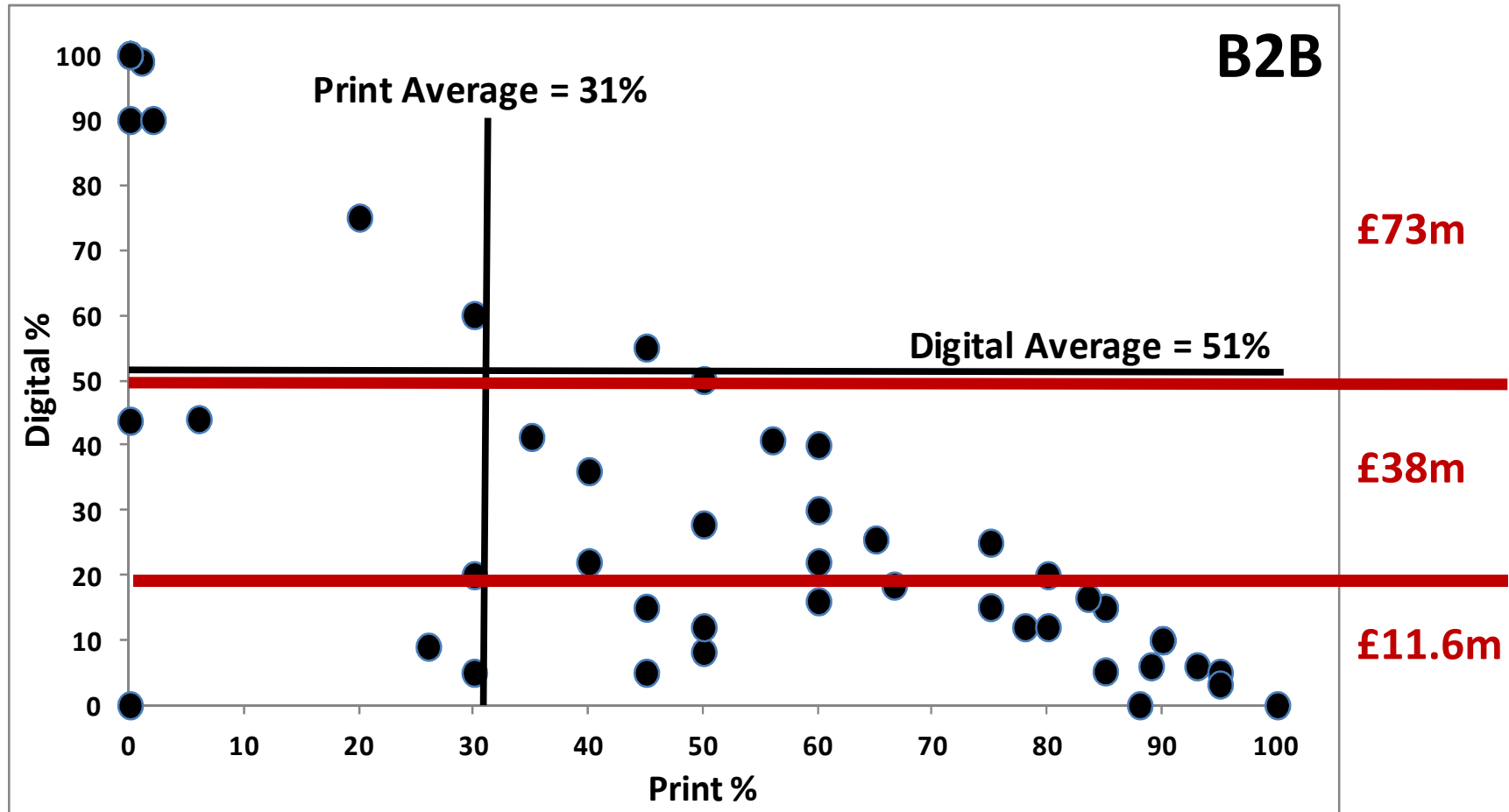
KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

B2B



Source: PPA Publishing Futures 2013/2014

KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP



Source: PPA Publishing Futures 2013/2014

KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

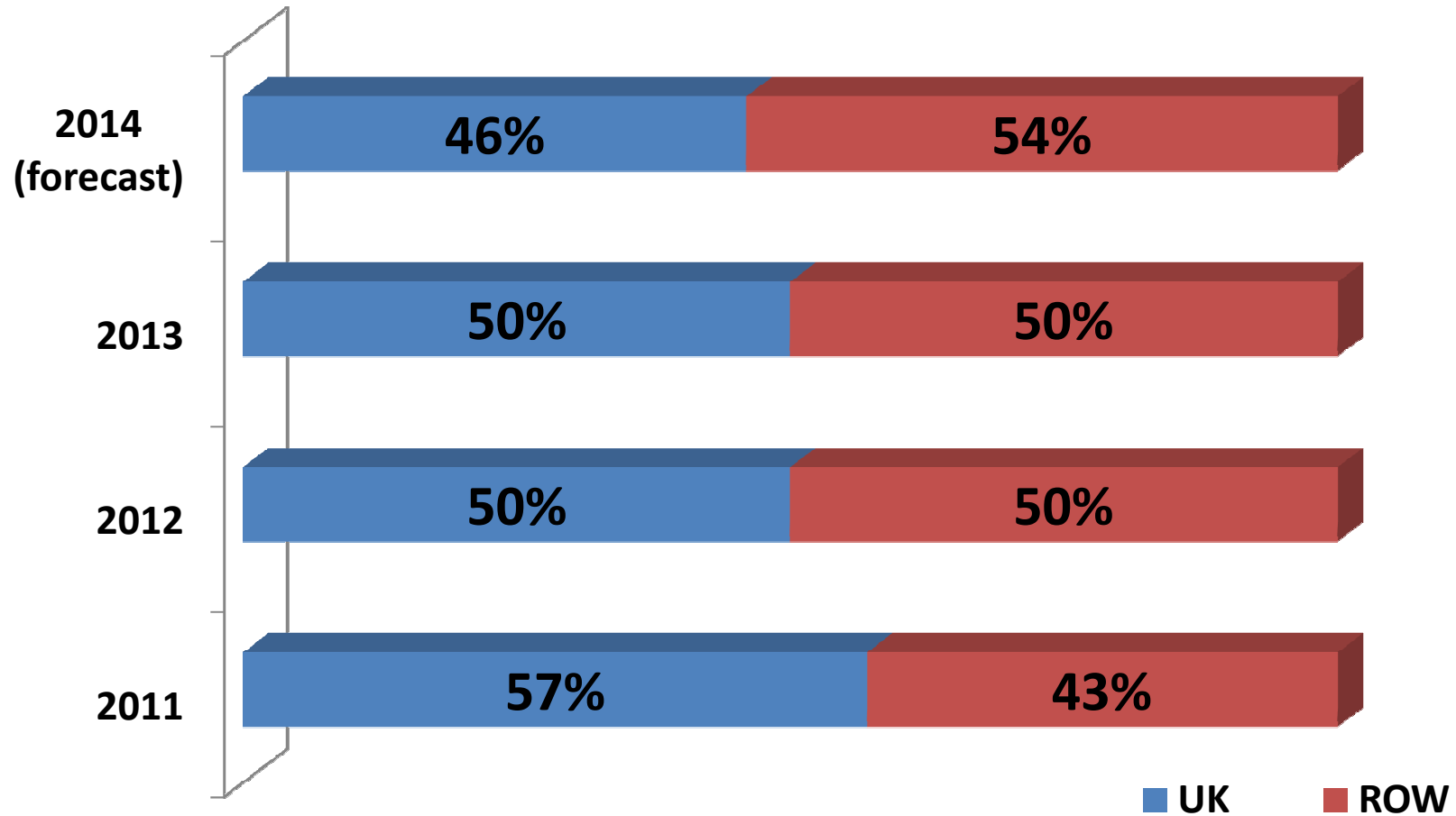
Key trends...

KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

An increasing global focus

KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

Domestic versus Overseas Revenue in PPA Business Membership



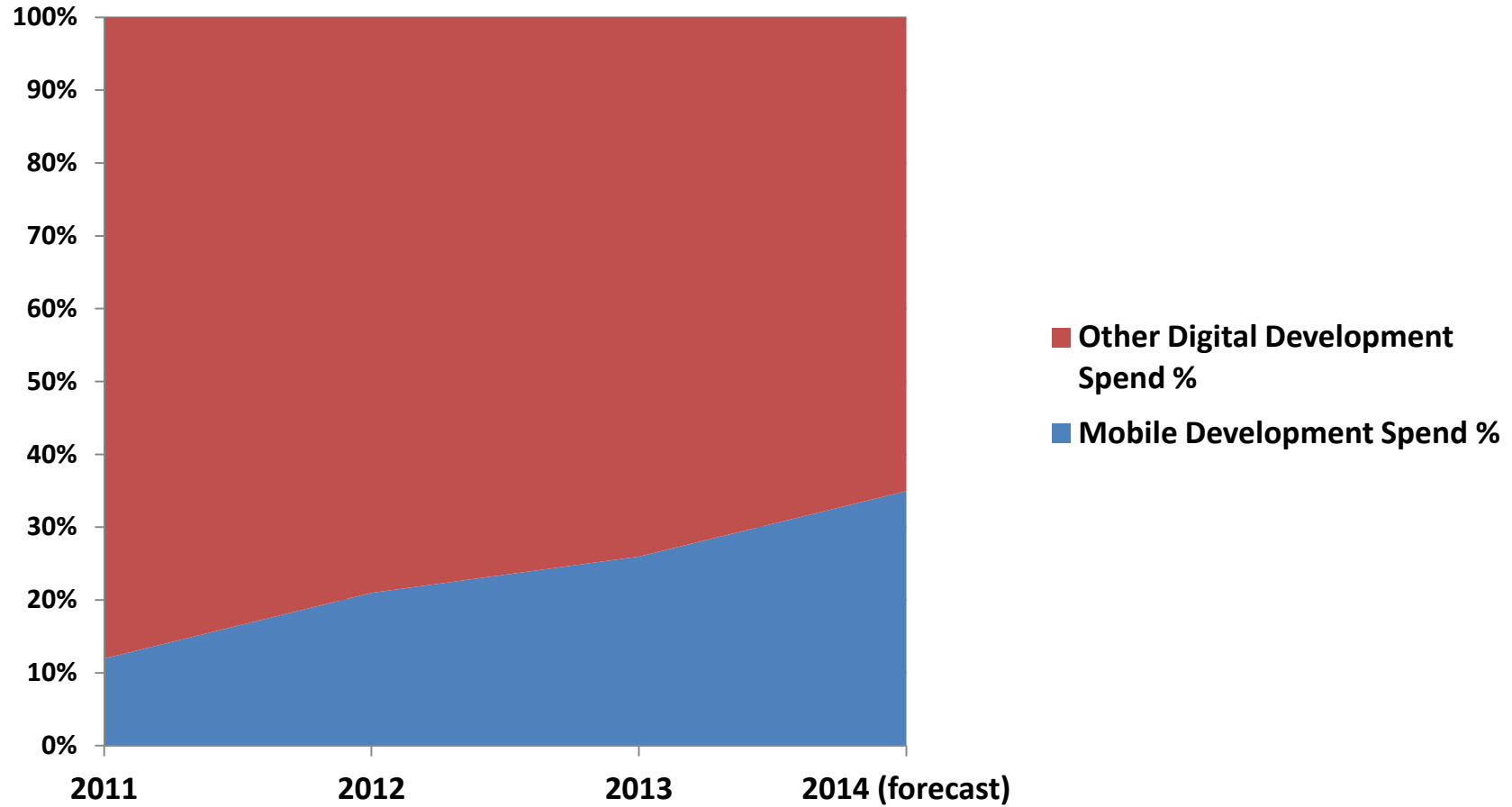
Source: PPA Publishing Futures 2011/2012; 2012/2013; 2013/2014

KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

Heavy investment in mobile products

KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

Investment in mobile as a % of digital investment

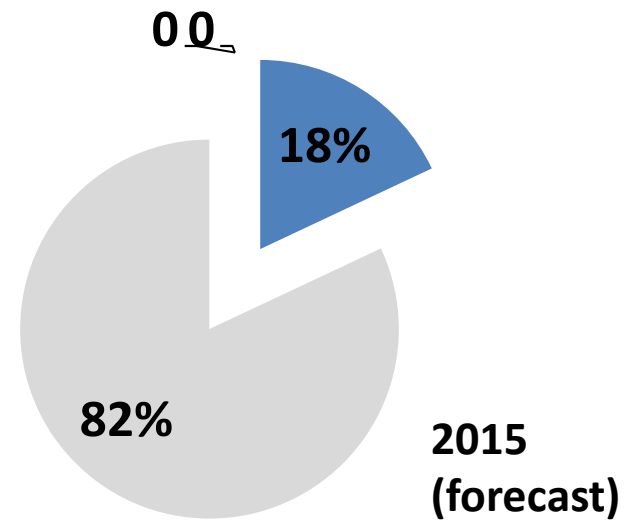
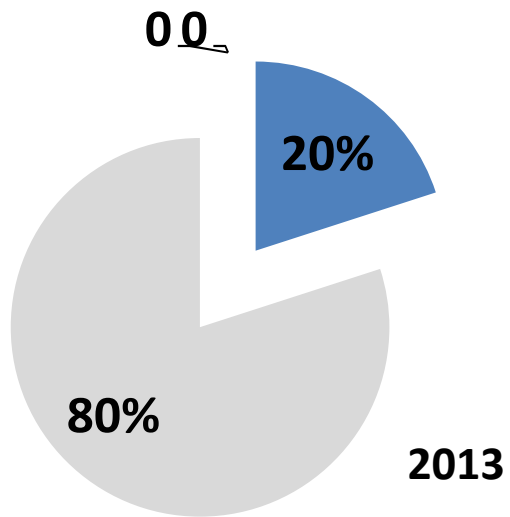


Source: PPA Publishing Futures 2013/2014

KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

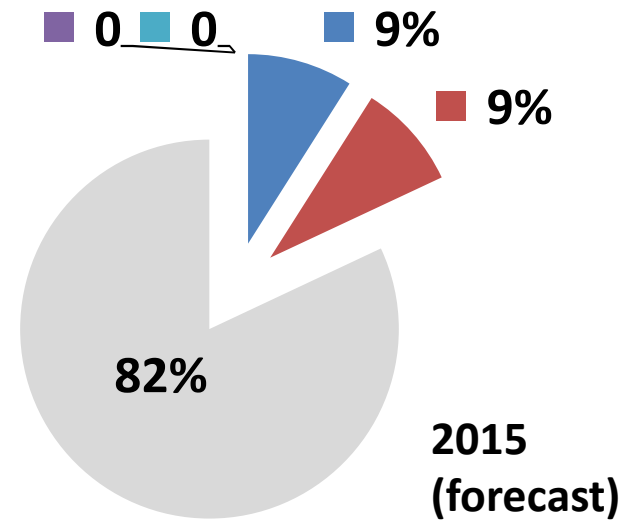
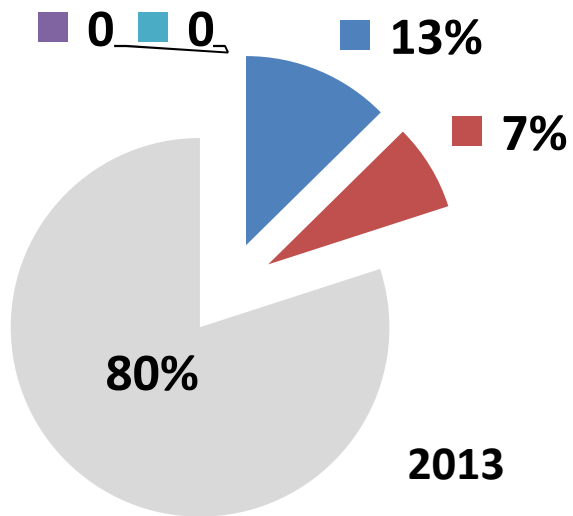
Print advertising is becoming a smaller part of our businesses

KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP



Revenue derived from advertising and sponsorship 2013

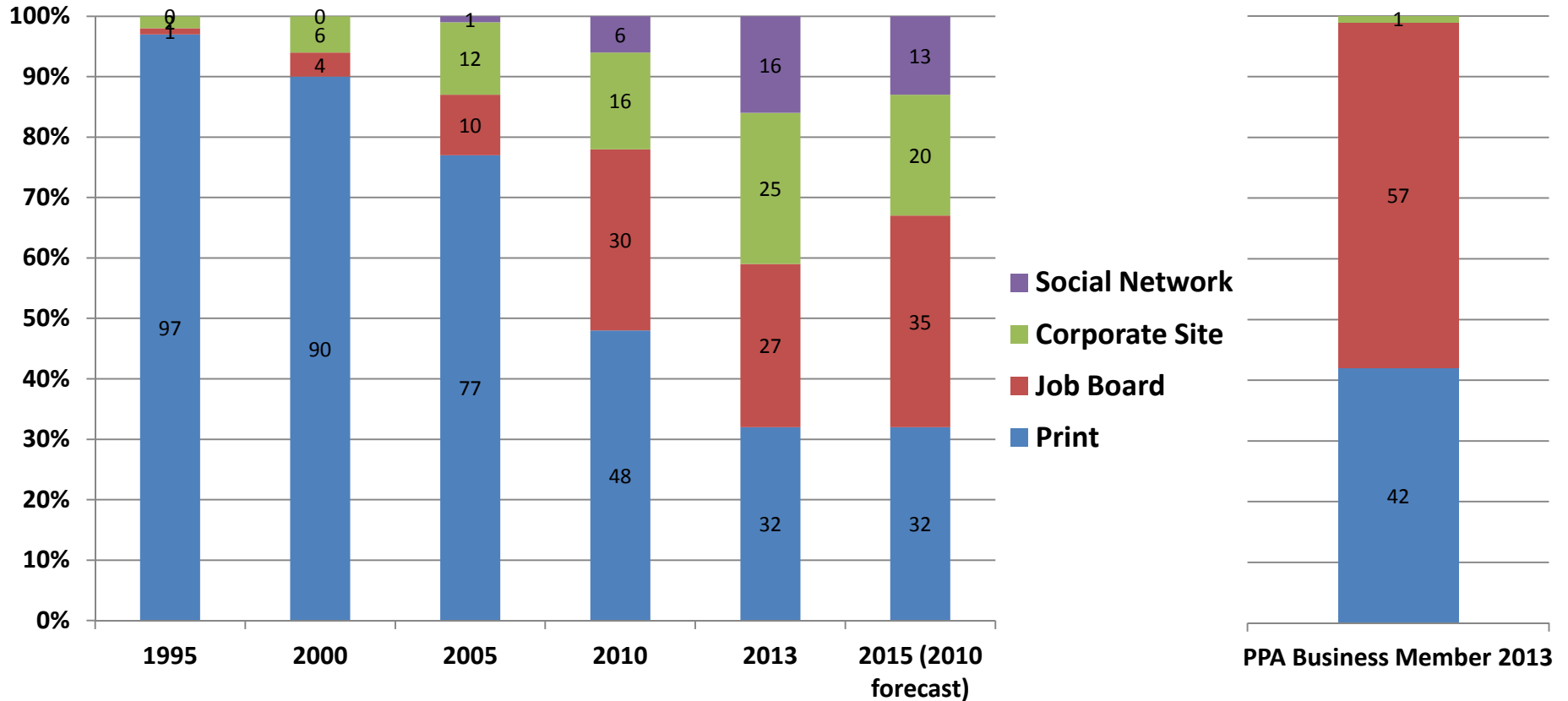
KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP



Digital ad revenue increasing to half of ad revenue

KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

UK Recruitment Advertising spend Vs. PPA Business Recruitment Revenue



Source: Enders Analysis 2010 & 2014 + PPA Publishing Futures 2013/2014



KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

Events are an increasingly important revenue stream

KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

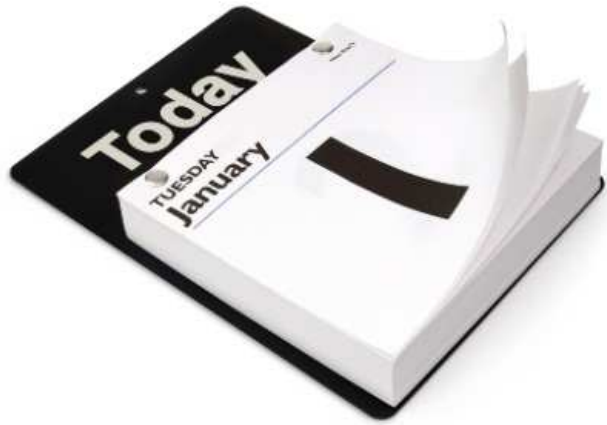


18%

Revenue
derived from
live events

Source: PPA Publishing Futures 2013 & 2014

KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP



86%

PPA Business
Members
intend to
launch a new
event in 2014

Source: PPA Publishing Futures 2013 & 2014

PPA BUSINESS

KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP



“As time
passes, pure-
play
conference
businesses
are likely to
look more and
more like B2B

media **PPA** BUSINESS
companies”

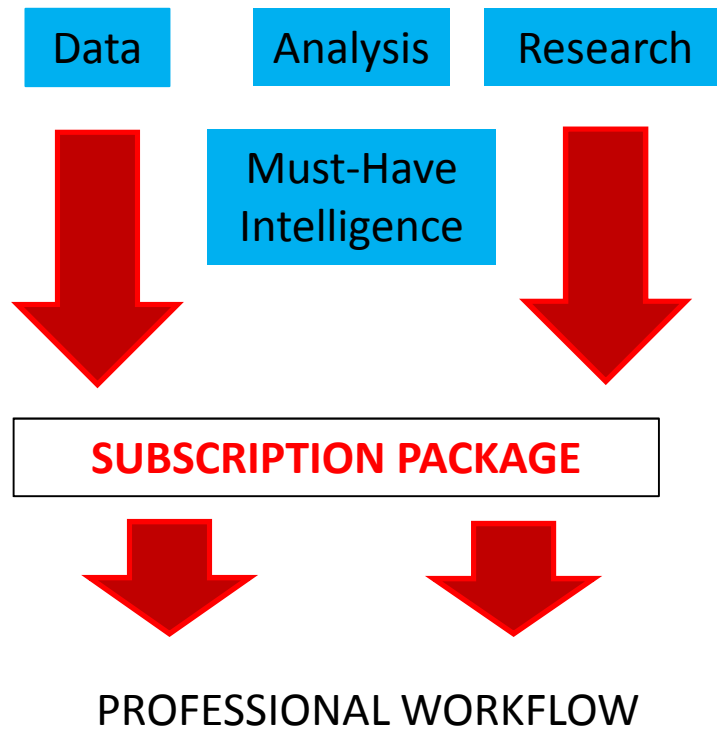
Source: PPA Publishing Futures 2013 & 2014

KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

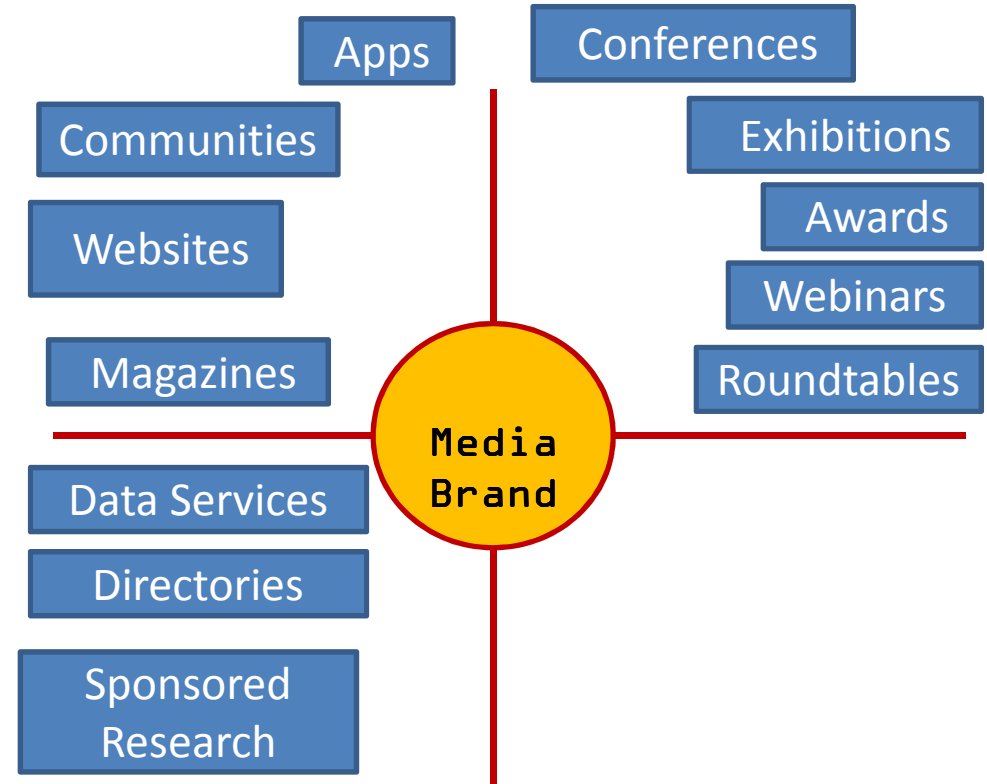
There is a divergence into slight variations of two broad business models...

KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

WORKFLOW MODEL

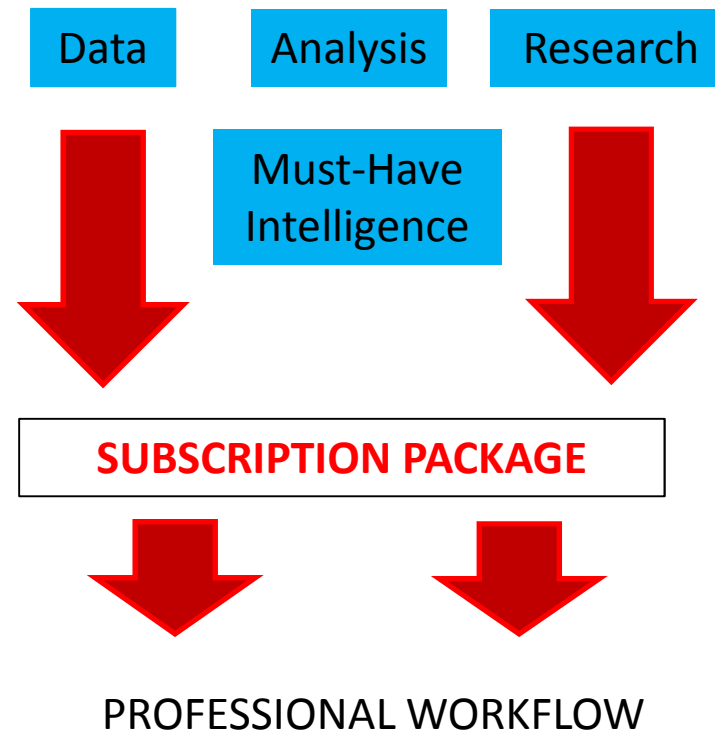


MEDIA BRAND MODEL



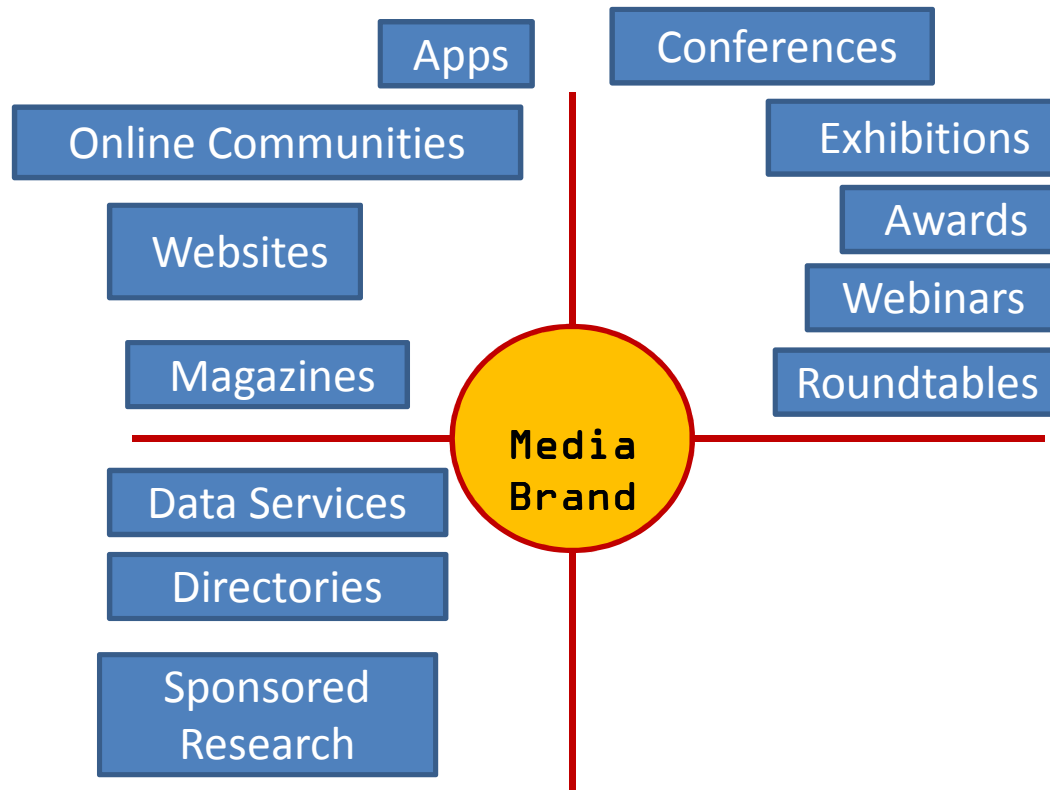
KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

WORKFLOW MODEL



KEY TRENDS IN THE PPA BUSINESS MEMBERSHIP

MEDIA BRAND MODEL



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