

State of the Industry - The Analysts Perspective

- **Jason Maynard**, Portfolio Manager, Credit Suisse
- **Kate Worlock**, Director, Market Intelligence Service, Outsell

Moderated by:

- **Ed Keating**, VP Content Division, and
- **David Thomas**, Executive Director, Software Division, SIIA



State of the Industry – The Analysts’ Perspective



Kate Worlock

Director – Market Intelligence Service

kworlock@outsellinc.com

SIIA NetGain

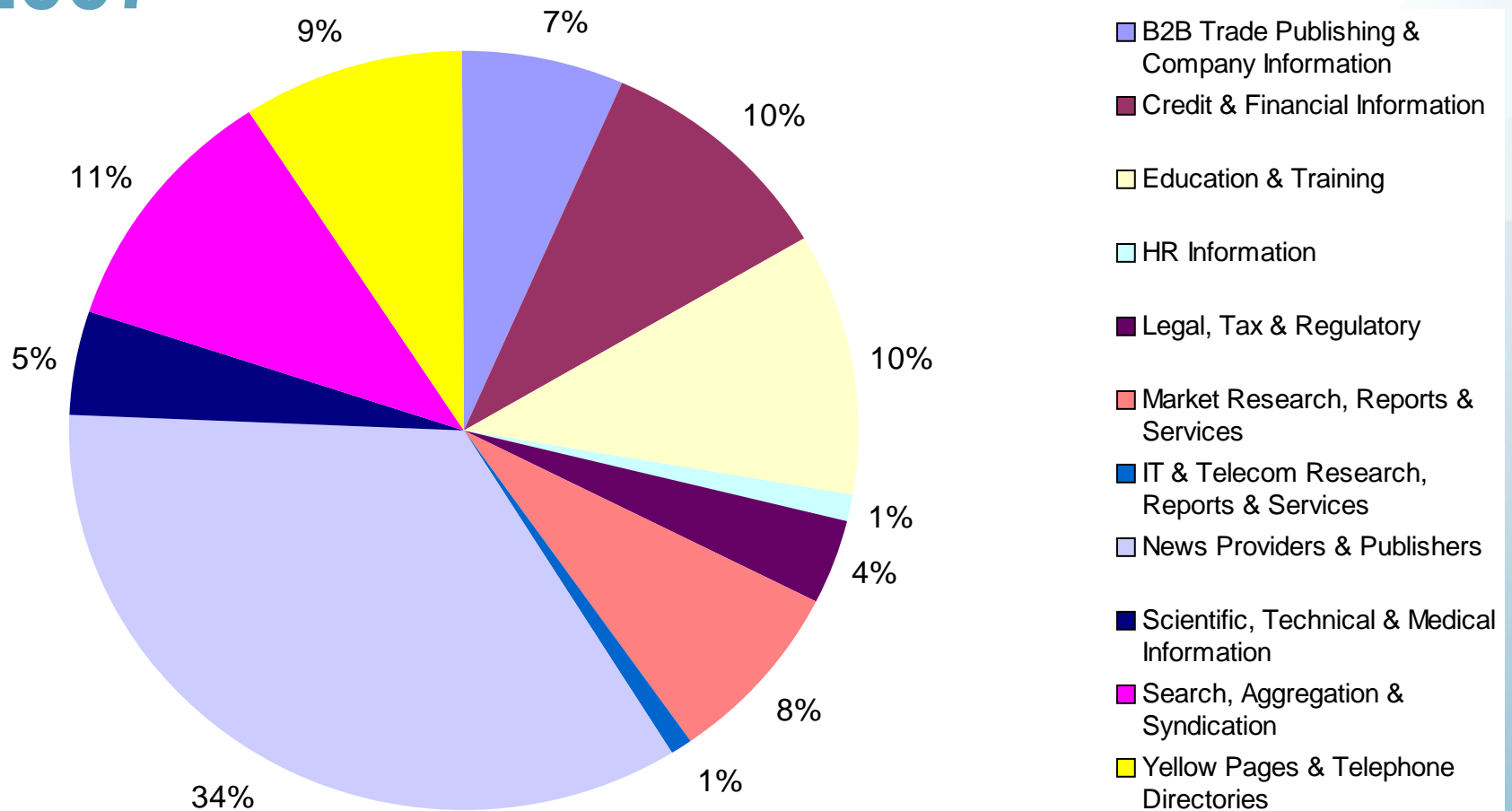
19 May 2008



Our Company

- **The only worldwide business information firm serving the media and information industry**
 - Global team of 50+
 - Track 9 segments in the US, Europe, and Asia
 - Provide fact-based analysis of markets, companies, trends, technology
 - Deliver actionable advice to CEOs and their teams in 300+ firms
 - Offer subscription, membership, and custom consulting services

Information Industry \$380 Billion in 2007

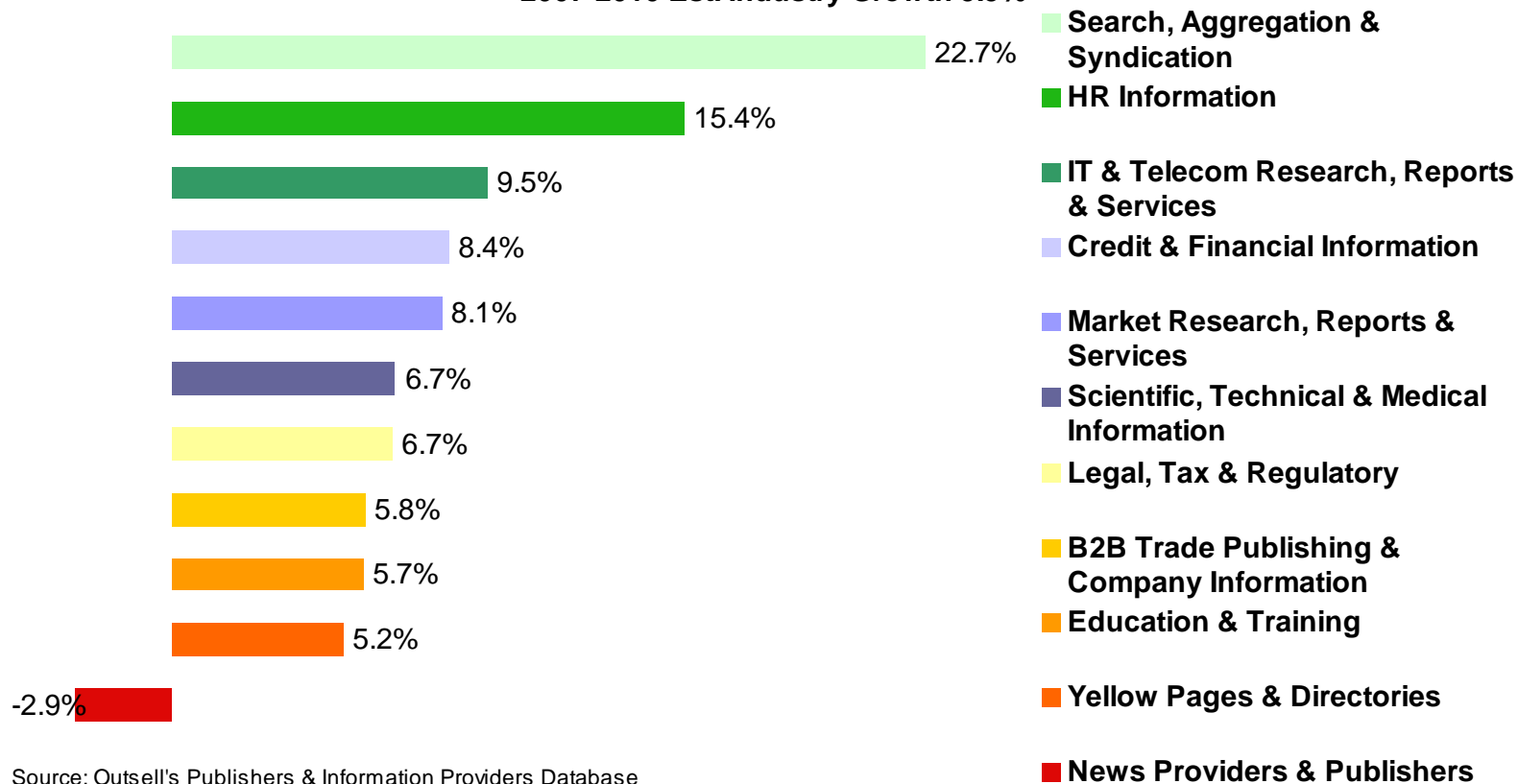


Source: Outsell's Publishers & Information Providers Database



Search to Soar, While News Nosedives

2007-2010 Est. Industry Growth 5.5%





The changing nature of search

- **Growing importance of semantic search**
 - Example: Hakia, illumin8
- **Demand for delivery of search results in a more visual way, indicating links between results**
 - Example: Grokker, Collexis
- **Moving from a push to a pull model**
 - Example: Reed Business' use of its Zibb search engine
- **Movement away from search to discovery**
 - Example: Aggregate Knowledge
- **Increasing demand for search to operate effectively across multiple content types (text, video, audio, images)**
- **Needs to continue to prove value as importance of personal recommendations increases**
- **Use of search across unstructured, untagged content: growing acceptance that relying on users to tag data is foolhardy, since either they don't do it, or the results are patchy**



Convergence of information and software: some examples

McGraw Hill
CONSTRUCTION Network[®]

MercuryMD
Solucient
Insight to Better Healthcare

 **visualfiles**



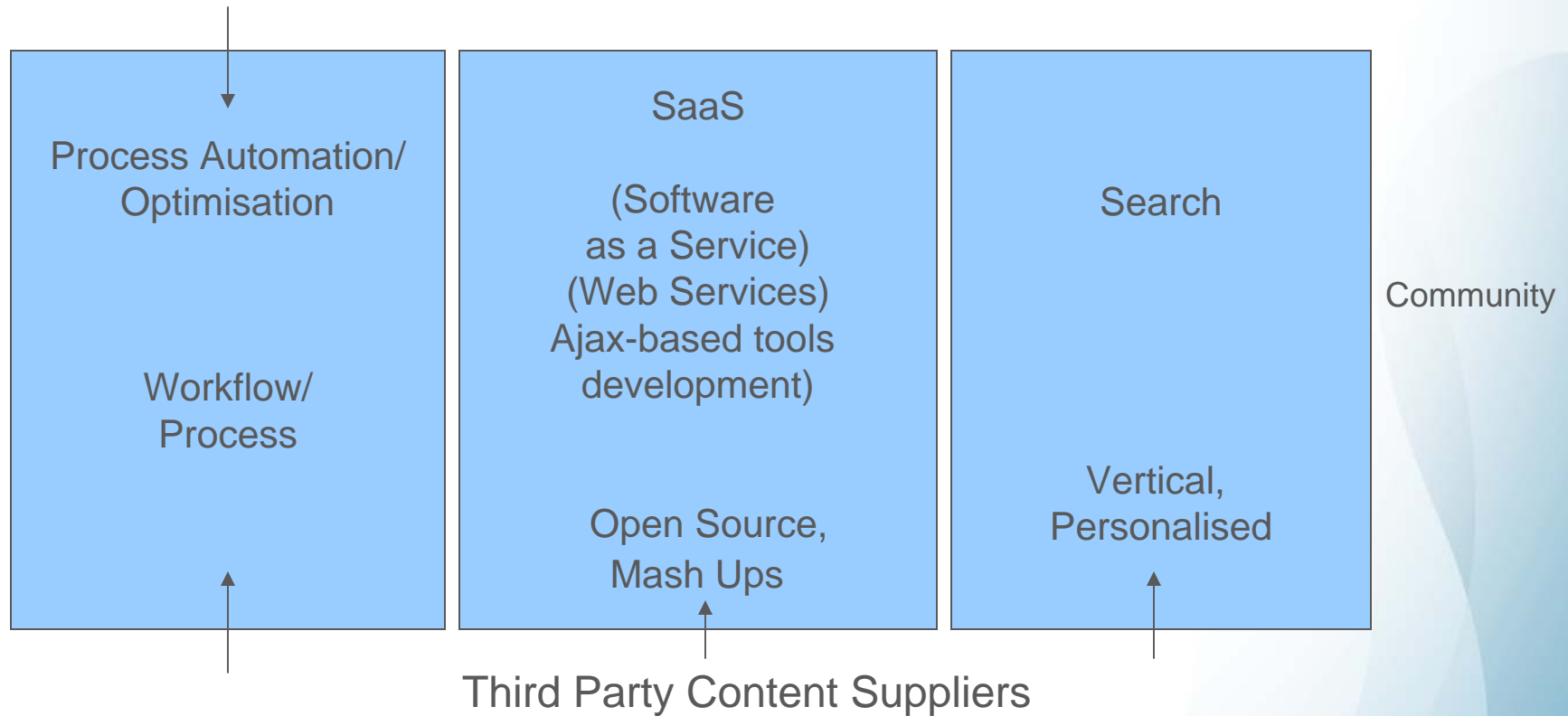
Why is workflow integration important?

- **Productivity:**
 - building project databases
 - developing evidence-based research
- **Decision-making:**
 - supporting research direction
 - finding, creating or adopting appropriate analytical tools
- **Compliance:**
 - ensuring regulatory framework is in place
 - creating awareness of parallel initiatives

“Research” may mean individual projects, but it is also collaborative and community-driven

Evolution: through Web 2.0 towards Enterprise 2.0

Enterprise IT Services (SAP, Oracle, Microsoft)





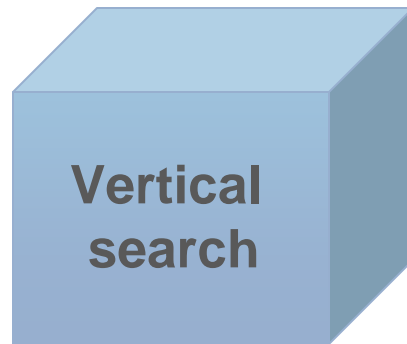
Building blocks for growth



Recognised?

Invented?

Secure?



Aggressive?

Defensive?

Drives business model?



Content requirement?

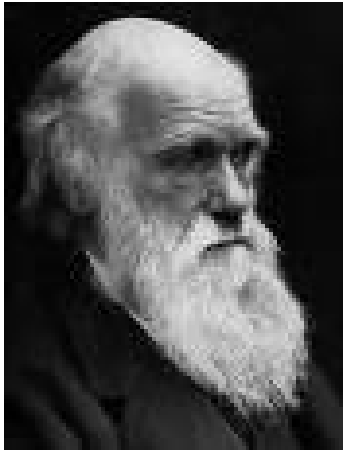
Whose tools?

Segment or extended?

So by 2020...

- All services are digital
- All services are mobile-proficient, and reflect high user expectations for point of reference information
- All services are fully customisable to groups of network users (corporations) and fully personalisable to individuals
- All services display high intelligence factors, and observe standards that allow maximum interoperability
- All services are funded by multiple revenue sources, using inter-service revenue reconciliation which is not apparent to the user

A final thought....



“It is not the strongest of the species that survive, nor the most intelligent, but rather the one most responsive to change”

Charles Darwin

Come By and Visit Us

Outsell, Inc.

330 Primrose Road, Suite 510
Burlingame, CA 94010
Tel. +1 650 342 6060 Fax +1 650 342 7135

7-15 Rosebery Avenue
London, EC1R 4SP
Tel. +44 (0) 20 7837 3345 Fax +44 (0) 20 7837 8901

<http://www.outsellinc.com>