



IRN RESEARCH

THE EUROPEAN B2B INFORMATION MARKET

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INTRODUCTION

This is the first report on the European Business-to-Business (B2B) Information Market prepared by IRN Research. The survey focuses on the UK, France, and Germany as these three markets combined account for the overwhelming majority of sales in the European B2B information market. Three market segments are examined in each of the countries:

- ◆ B2B Journals and Magazines
- ◆ B2B Directories and Databases
- ◆ B2B Exhibitions and Conferences

A European Overview section analyses trends in the total European B2B Information Market precedes the country chapters.

Definitions

The geographical coverage encompasses all 15 EU countries at the start of 2004, plus Norway and Switzerland.

Market size figures for specific markets are based on an analysis of sales for companies in Europe, plus any data supplied by national industry bodies. Latest annual data for market sizes covers 2005.

Exchange rates used to calculate Euro (€) value equivalents of national currencies (used in market sizes for the UK) are constant 2002 rates against national currencies.

All company financial data is presented in the currency used by the reporting company.

1. EXECUTIVE SUMMARY

This report considers the European market for three B2B information sectors: journals and magazines; directories and databases; exhibitions and conferences. Detailed market information is given for the three leading markets – UK, France, and Germany – plus an overview of European trends.

The European market for B2B information, as defined here, is estimated at €28.7bn with business journals and magazines taking the largest share of sales – 40.4%. The second largest segment is exhibitions and conferences (34.1%) followed by directories and databases (25.5%). The combined sales in UK, France, and Germany account for over two-thirds of all European sales in all three market segments.

The overall B2B market grew sales by only 1.8% in 2005 but, within this total, B2B directories and databases was the best performing market sector increasing sales by 5.8% in 2005.

Directories and databases have successfully migrated to the Web and increased sales through new product developments on the Web. Journal and magazines have seen their share of the total B2B information market slip as advertising revenues have fallen. The move to Web delivery has been slower in the journals and magazines sector and has yet to bring in significant revenues. The exhibitions and conferences market is growing over the long-term but sales dip in alternate years as many events are only held every two years.

The B2B information industry is a highly fragmented one: there are still many small players and industry concentration is low but increasing. This is particularly true in business journals and magazines. The exception to this rule is the directories and databases sector where the leading players in all three countries examined here take a dominant share of the market. Some of the larger mergers and acquisitions in Europe in 2005 and 2006 have been in the directories and databases market.

In all three countries profiled in this report, the business journals and magazines markets have struggled to increase sales in recent years as advertising revenues have fallen. This has been particularly true in France where the recovery in advertising spending is lagging behind the recoveries in Germany and the UK.

The directories and databases market has been the strongest performer in all three countries, while the exhibitions and conferences market has seen some decline in sales in 2005.

Advertising revenues are starting to grow again in all three countries and new product developments, particularly Web-based, should help to boost growth in the next few years. Further consolidation will also enable further investment in products and services.