

# Global Economic Pressures

## Changing Local Ad Buying Behaviors

### Shift to Online Platforms



# What Is the Outlook for Global Yellow Pages?

From the trusted source for accurate and thorough information and analysis about the global Yellow Pages industry

## Global Yellow Pages™ 2009

The Kelsey Group's Outlook & Forecast

- Operational details, analysis and detailed company backgrounds
- Context for understanding the numbers
- Based on The Kelsey Group's deep and longstanding knowledge of the Yellow Pages industry and close relationships with many of the world's leading companies

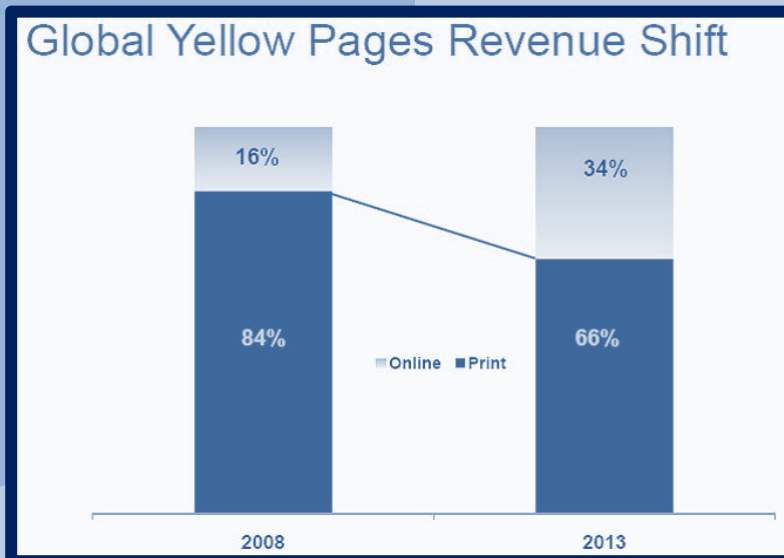
Knowing where the Yellow Pages industry is headed has never been more critical to your business.

*Global Yellow Pages™ 2009* is the most comprehensive report available on the global Yellow Pages industry. It is the best resource for finding the world of Yellow Pages in one place. We tie all the data together into a set of global benchmarks against which publishers can measure themselves.

The fifth edition of *Global Yellow Pages™* is the essential planning tool for any company evaluating new markets, existing or potential competitors, key management, successful product/sales strategies and trends that are shaping the rapidly evolving directory business.

*Global Yellow Pages™ 2009* features a searchable database for quick access to the data you need most:

- Titles, distribution, total employees, number of sales representatives
- By region, country or publisher
- By revenue type: print, digital or total revenues
- Quarterly updates of public company revenues and income



Source: The Kelsey Group (2009)

## ORDER NOW!

Contact: Jill Angle at (650) 948-5776 or [jangle@kelseygroup.com](mailto:jangle@kelseygroup.com).

For more information, visit: [www.kelseygroup.com/services/global-yellow-pages.asp](http://www.kelseygroup.com/services/global-yellow-pages.asp).



[WWW.KELSEYGROUP.COM](http://WWW.KELSEYGROUP.COM)

# Global Yellow Pages™ 2009

## The Kelsey Group's Outlook & Forecast



### Partial List of Companies That Have Purchased Global Yellow Pages™ Since 2002

ABN AMRO Bank | Abraaj | Acxiom  
 Amdocs | Anuncios en Directorios  
 AOL | Associated Publishing | AT&T  
 Publishing & Advertising | Babcock & Brown  
 Bain & Co. | Ban Capital | The Berry  
 Company | BT | Citysearch | Credit Suisse  
 First Boston | Daniels Online | Deutsche  
 Bank | Editus Luxembourg | Eniro | Ernst &  
 Young | European Directories | Fidelity  
 Fulfillment.net | Golden Pages Israel  
 Goldman Sachs | Google | GSD&M  
 | Idearc Media | InfoSpace | MacQuarie  
 Bank | McKinsey | Merrill Lynch | Microsoft  
 Montrica | J.P. Morgan | N.M. Rothschild  
 Norske Skog Canada | Pindar Set | Publicar  
 Quebecor | R.H. Donnelley | Richmond  
 Capital | R.R. Donnelley | Seat Pagine  
 Gialle | Sensis | Singapore Yellow Pages  
 Singapore Press Holdings | Sutter  
 Telefonica | Thomson Local | t-info | Trudon  
 Truvo | Varetis | Viking Global Investors  
 Yahoo! | Yell Group | Yellow Pages Group  
 Yellow Pages New Zealand  
 YellowPages.com

### KEY FEATURES

<b>Searchable Database Access</b>	<ul style="list-style-type: none"> <li>In addition to the profiles and analysis contained in <i>Global Yellow Pages™ 2009</i>, purchasers receive access to a searchable database of key performance indicators: Titles, Distribution, Total Employees, Number of Sales Reps.</li> <li>The database will include quarterly updates of revenues and EBITDA for public companies.</li> </ul>
<b>Beyond the Numbers</b>	<ul style="list-style-type: none"> <li><i>Global Yellow Pages 2009</i> features operational details, analysis and detailed company backgrounds. The Kelsey Group provides context to the numbers by leveraging its deep and longstanding knowledge of this industry and its close relationships with many of the world's leading companies.</li> </ul>
<b>Comprehensive</b>	<ul style="list-style-type: none"> <li><i>Global Yellow Pages 2009</i> is the best resource for finding the world of Yellow Pages in one place. We tie all the data together into a set of global benchmarks against which publishers can measure themselves.</li> </ul>
<b>Detailed Company Profiles</b>	<ul style="list-style-type: none"> <li>In addition to data, profiles feature a discussion of key initiatives, challenges, recent developments, and future outlook for the top global directory publishers.</li> </ul>
<b>Detailed Market and Company Level Benchmarking Metrics</b>	<ul style="list-style-type: none"> <li><b>Market Level</b>—Market size; 2008 Growth rates (total, print, digital); Forecast CAGR (total, print, digital) 2008-2013; Directory revenue per capita; Estimated directory titles + average revenue per title; Estimated directory distribution + average revenue per copy; Advertisers &amp; ARPA</li> <li><b>Company Level</b>—Revenues; Margins; Advertisers; Key executives; Ownership; Titles &amp; distribution; Employees and sales reps; Key developments 2007-2009</li> </ul>
<b>Regional Overviews and Worldwide Comparison Tables/Global Leaders</b>	<ul style="list-style-type: none"> <li>Largest Publishers</li> <li>Fastest Growing Publishers</li> <li>Regional Share</li> <li>Global Forecast</li> <li>Global Industry Snapshot</li> </ul>
<b>Tables Featuring the Top Global Yellow Pages Publishers by:</b>	<ul style="list-style-type: none"> <li>Rate of Revenue Growth</li> <li>EBITDA</li> <li>ARPA</li> <li>Revenue per Title</li> <li>Revenue per Distributed Copy</li> <li>Share of Digital Revenue</li> </ul>

### ORDER NOW!

Contact: Jill Angle at (650) 948-5776 or [jangle@kelseygroup.com](mailto:jangle@kelseygroup.com).

For more information, visit: [www.kelseygroup.com/services/global-yellow-pages.asp](http://www.kelseygroup.com/services/global-yellow-pages.asp).



WWW.KELSEYGROUP.COM