

DMS '09 Preview: What Keeps Yellow Pages Industry Leaders Up at Night... and What Gets Them Up in the Morning?



**BIA/Kelsey Webinar
August 12, 2009**

2 pm – 3 pm EDT

11am – 12 pm Pacific

Today's Webinar Topics



- DMS '09 at a glance
- The global Yellow Pages landscape
- Meta-theme #1: Embracing accountability
- Meta-theme #2: Transforming the sales channel
- Meta-theme #3: Reinventing the business model
- Roundtable discussion
- Q&A



Today's Speakers



- Charles Laughlin SVP & Program Director, The Kelsey Report
- Matt Booth, SVP, Program Director, The Kelsey Group
- Nancy Augustine, SVP, Association of Directory Marketing
- Bill Dinan, President, Telmetrics



DMS '09 At a Glance



- 300+ industry players -- decision makers and influencers
- 40+ diverse speakers across 15+ sessions
- Strong international presence
- Alliance with YPA
- Increased focus on national advertisers
- New TKG research on SMB advertisers



DMS '09 Keynote Speakers



Christopher Cummings
CEO
Marquette Group



Frank Jules
President and CEO
AT&T Advertising Solutions



Donat Rétif
CEO
Truvo



David C. Swanson
Chairman & CEO
R.H. Donnelley

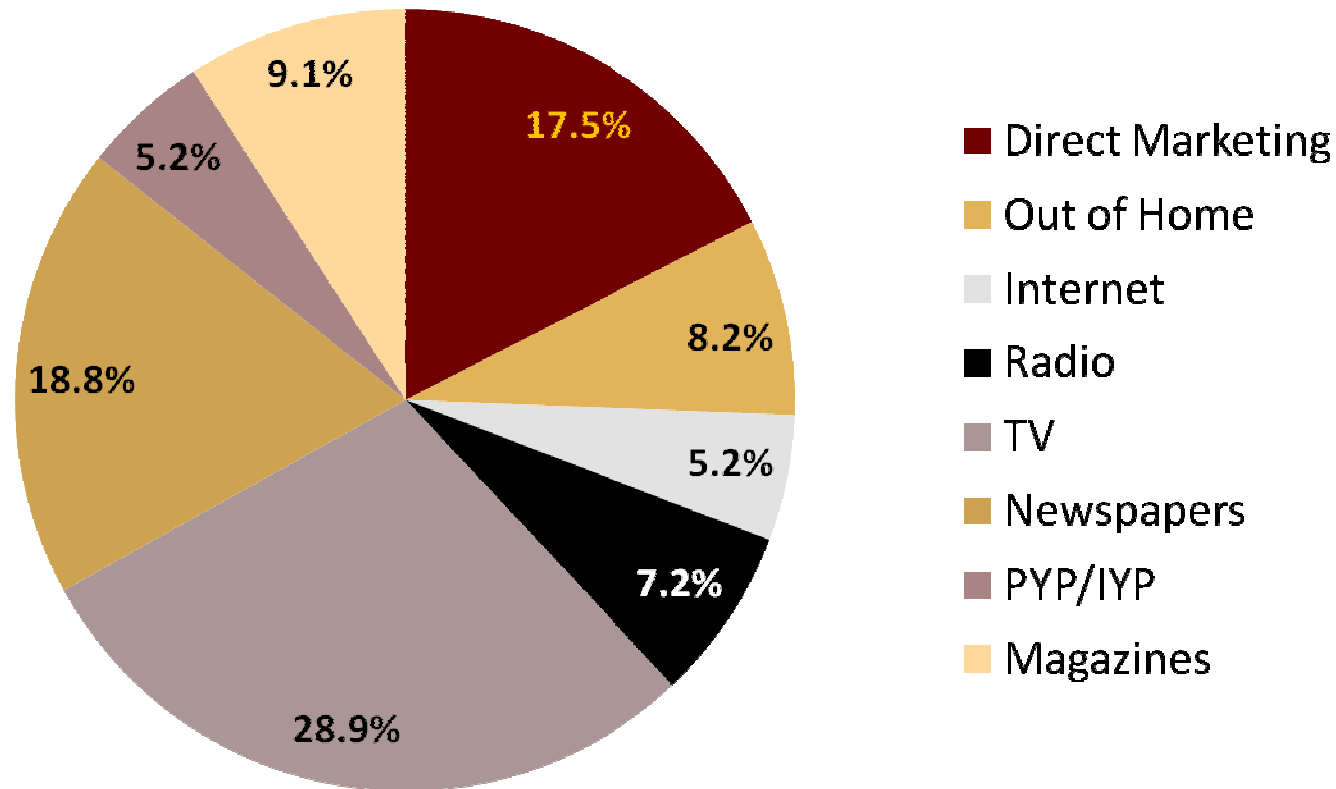
The DMS '09 keynoter roster represent

- >27% of 2008 global Yellow Pages revenue
- >17,000 employees
- >7,400 sales representatives & account execs
- >2,000 print directory titles
- >272 million printed directories
- >\$1 billion in online revenue



Global Media Breakdown 2008

DMS '09
September 22-24, 2009
Hyatt Regency Grand Cypress
Orlando, Florida



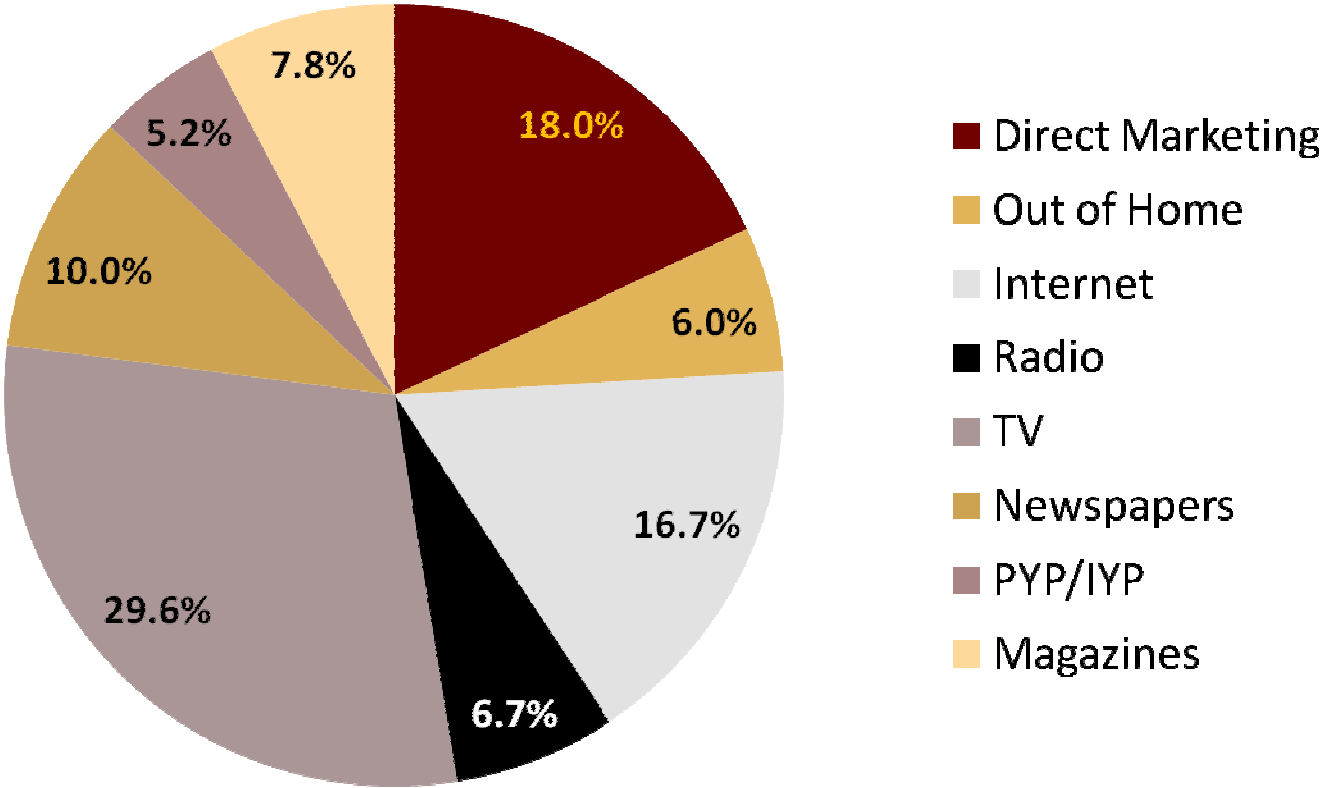
Source: BIA/Kelsey (2009)



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Global Media Breakdown 2013

DMS '09
September 22-24, 2009
Hyatt Regency Grand Cypress
Orlando, Florida

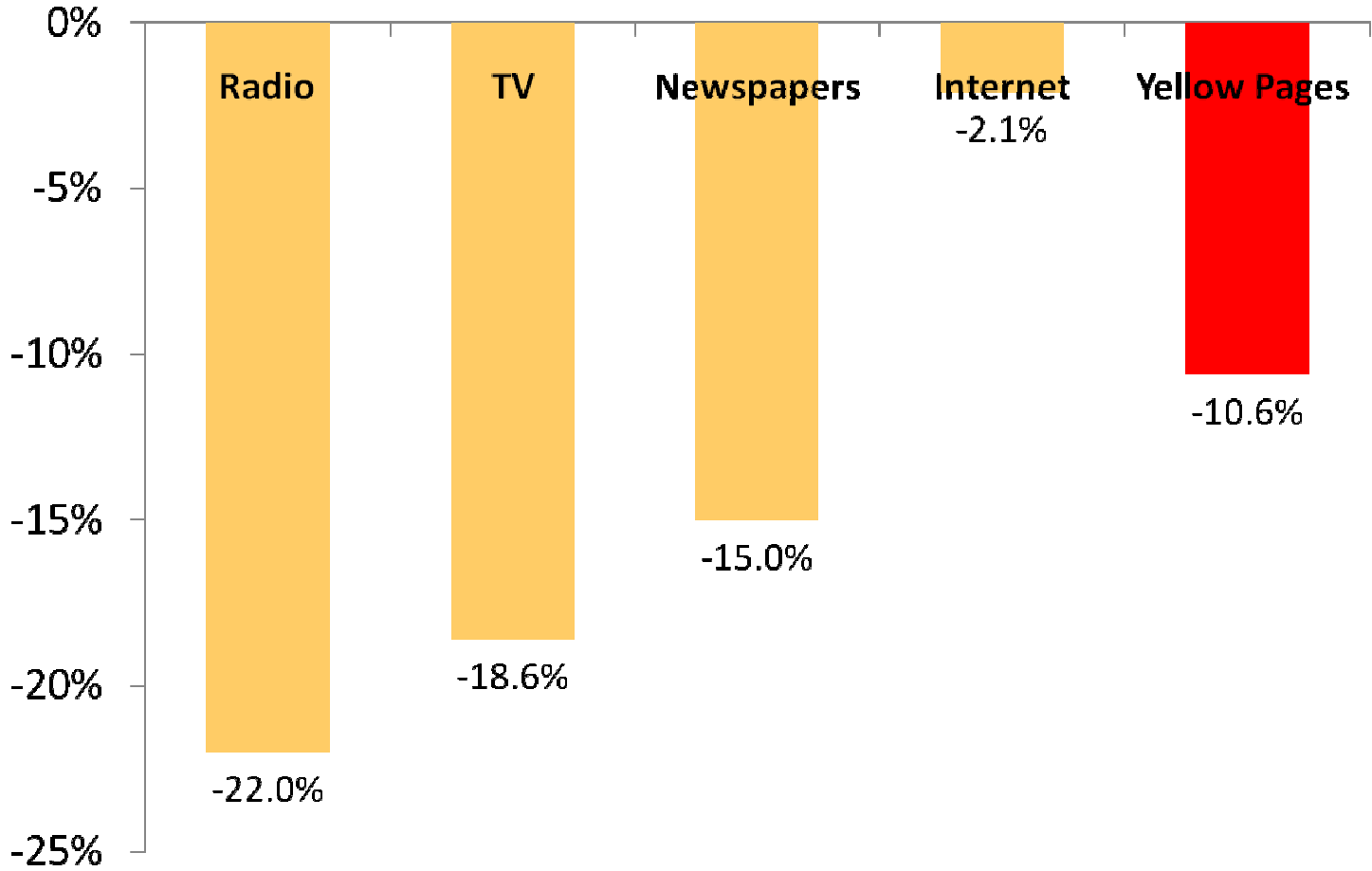


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U.S. Media Performance Q1 2009



Source: BIA/Kelsey (2009)



The Global Yellow Pages Landscape



- Economy + migration accelerates pressure for publishers to make revolutionary changes to their businesses
- Most highly competitive directories markets (USA, UK, Brazil...) are experiencing or anticipating consolidation
- As consolidation happens, commitment to transparent, multiproduct selling will distinguish the winners
- Increasingly publishers see themselves not as Yellow Pages publishers but as lead aggregators for SMBs



Meta-Theme 1: Embracing Accountability



- Use of PFP moving from online to print
- Once for non-traditional and rescue accounts – pay for performance is now coming into general use
- What's causing the transformation?
 - The economy drives more questioning of value of media spend
 - Transparency of online media raises expectations for accountability

DMS sessions dealing with this topic:

- **Fixing the Yellow Pages Business Model**
- **The Global Yellow Pages Leadership Forum**
- **Understanding Users and Advertisers – A Deep Dive into Exclusive TKG Data**



Meta-Theme 2: Transforming the Sales Channel



- The business is increasingly multiproduct, digital and explicitly performance-based
- SMBs are more demanding and less receptive to sales messages that are not based on ROI
- Sales training needs a complete overhaul to keep up with changes in the local landscape

DMS sessions dealing with this topic:

- **Building a Multi-Product Sales Foundation**
- **Moving Multi-Product Selling Beyond Bundles**
- **Fixing the Yellow Pages Business Model**



Meta-Theme 3: Reinventing the Business Model



Every aspects of the Yellow Pages business model is under scrutiny:

- The 12-month publishing cycle
- The subscription based pricing model
- The 100% carbon-based sales channel
- The print + online financial reporting model
- The ubiquitous A-Z Yellow Pages directory
- The proprietary IYP platform

DMS sessions dealing with this topic:

- **Vertical Case Studies: Lessons for Yellow Pages Publishers**
- **Fixing the Yellow Pages Business Model**
- **The Global Yellow Pages Leadership Forum**



DMS '09: Benefits of Attending



- **Understand** into how leading players are adapting to change
- **Learn** the key changes the next 3-5 years will bring
- **Share** best practices with colleagues from around the world
- **Discover** and network with potential customers and partners
- **Compare** your company's performance against global peers



Roundtable Discussion



“What Keeps Yellow Pages Industry Leaders Up at Night... and What Gets Them Out of Bed in the Morning?”

- Charles Laughlin, SVP & Program Director, The Kelsey Report
- Matt Booth, SVP & Program Director, Interactive Local Media
- Nancy Augustine, SVP, Association of Directory Marketing
- Bill Dinan, President, Telmetrics



Global Yellow Pages 2009

- Comprehensive fact book on the global directory publishing industry
- Profiles of more than 60 companies worldwide
- Directory revenue forecasts (2008-2013) for more than 30 countries
- Company profiles include:
 - Sales channels
 - Revenues by channel
 - Margins
 - Print, digital and mobile search products
 - Directory titles and distribution
 - Key strategic initiatives



Questions and Answers



Thank you for attending today's event.

For more information about DMS, please contact:
Nanci Karas – nkaras@kelseygroup.com

or

Go online to:

<http://www.kelseygroup.com/dms2009/index.asp>

Please use the GoToWebinar control panel to submit questions.

For all other inquiries, please email us at: webinars@bia.com

