2019 Investor Day

Depth & Specialisation

10 May 2019

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Agenda

Depth & Specialisation	Stephen A Carter
Strength & Growth from Specialisation	Charlie McCurdy
Specialist Markets: Pharma Focus	Adam Andersen
Specialist Markets: Fashion Focus	Mark Temple-Smith & Colette Tebbutt
Specialist Markets: China Focus	Margaret Ma Connolly
Scale & Simplification	Patrick Martell & Ian Branch
The Power of Specialist Data & Information	Patrick Martell
Specialist Markets: Pharma Focus	Linda Blackerby & Ramsey Hashem
Culture Question Time	Eleanor Souster & Panel
Resilience & Strength through Specialist Knowledge	Annie Callanan & Team
Reformatting the Programme around Specialist Markets	Gary Nugent, Marco Pardi & Carolyn Dawson
Wrap-Up	Stephen A Carter

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Re-formatting the Programme Around Specialist Markets

Gary Nugent
CEO, Informa Tech

10 May 2019

Informa Tech
Speakers

Gary Nugent

CEO Informa Tech

Carolyn Dawson

Managing Director Informa Tech

Marco Pardi

Managing Director Informa Tech

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The Knowledge & Information Economy

294bn
emails sent daily,
rising to 306bn by 2020
and 320bn by 2021...
with 3.9bn people using emails

Source: Radicati Group

500m
tweets sent every day

Source: Twitter

5bn
searches made per day,
with 3.5bn from Google

Source: Smart insights

4PB
data created by Facebook,
inc. 350m photos and
100m hours of video

Source: Facebook Research

95m
photos and videos are
shared daily on Instagram

Source: Instagram Business

463EB
data created every day by 2025

Source: IDC

4TB
data produced by a
connected car

Source: Smart insights

28PB
generated from wearable
devices by 2020

Source: Statista

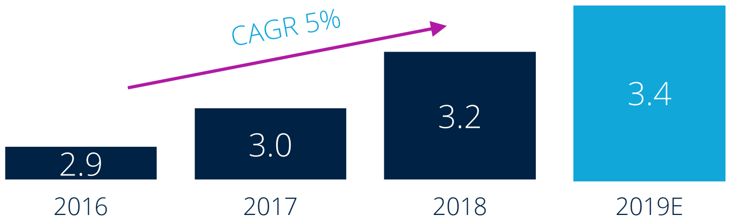
4.4ZB
Accumulated digital universe
of data in 2019,
rising to 44ZB by 2020

Source: PWC

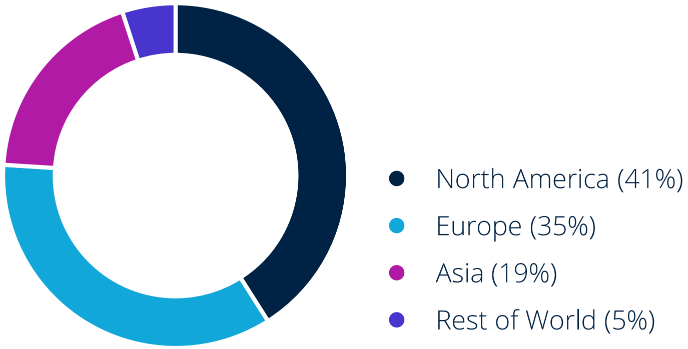
Specialist Markets: Technology

- Growth market with high levels of innovation and change
- Global Technology market spending c.$3.5tr
- Over 25% of $30tr US stock market is in Technology
- Cloud, 5G ,Big Data, AI, Cyber Security, Blockchain, IoT
- Public confidence - data, governance, security and privacy

Global Technology Market Spend ($tr)



Information Services Market, by Sector (%)



Source: Statista

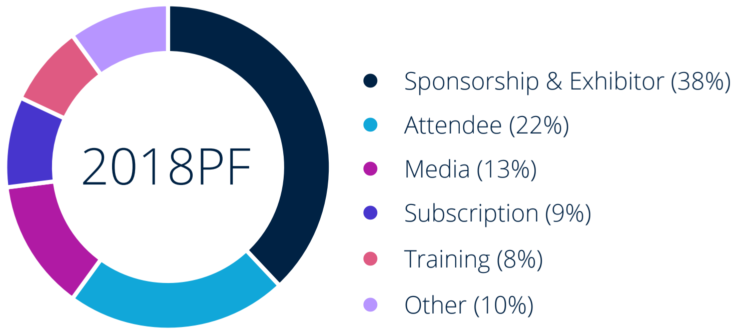
Large, growing and international market with high levels of innovation and change

Informa Tech Today

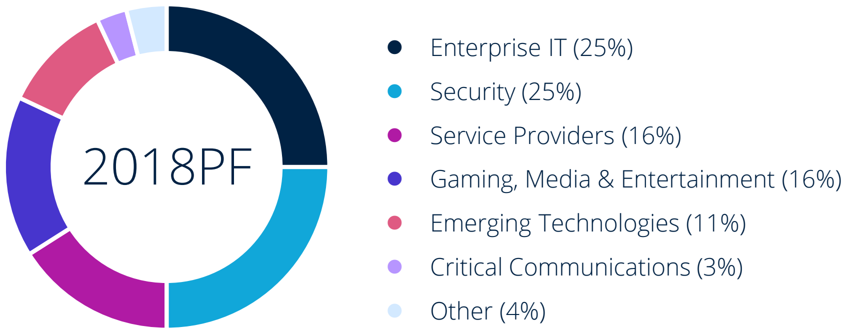
Informa Tech informs , educates and connects specialist Technology communities around the world. Through more than 100 B2B brands, we provide specialist intelligence and knowledge, and build platforms for customers to engage, learn and be inspired to create a better digital world.

£220m+	Revenue
c.£60m	Adj. Op Profit
100+	B2B Brands
3.8m	Monthly Readers
c.2%	Underlying Growth
c.8%	Group Revenue
c.600	Colleagues
360+	Subject Experts

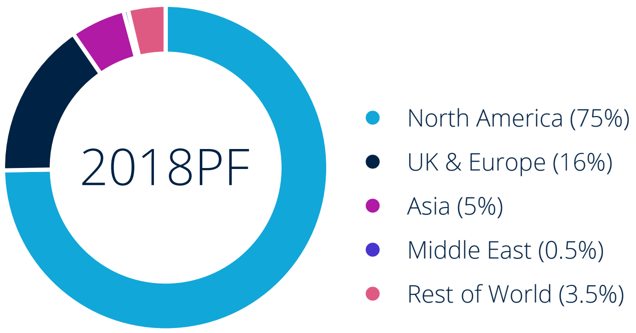
Revenue by type



Revenue by tech sub-vertical



Revenue by region



Purpose, Ambition, and Target

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Audiences
Which Technologies to invest in or buy?
How to deploy and derive value?

Inspire
Inform
Educate
Connect

Clients
Which markets?
What products & services?
How to market & sell?

Purpose

We help drive the future by inspiring the Technology community to design, build and run a better digital world.

Ambition

To become the market-leading provider of information, education and connection to the Technology community

Target

Double organic growth:

>4%

Build & Buy revenue to

£300m+

by the end of 2022

225k+
Annual Event Delegates

3.8m+
Monthly Media Readers

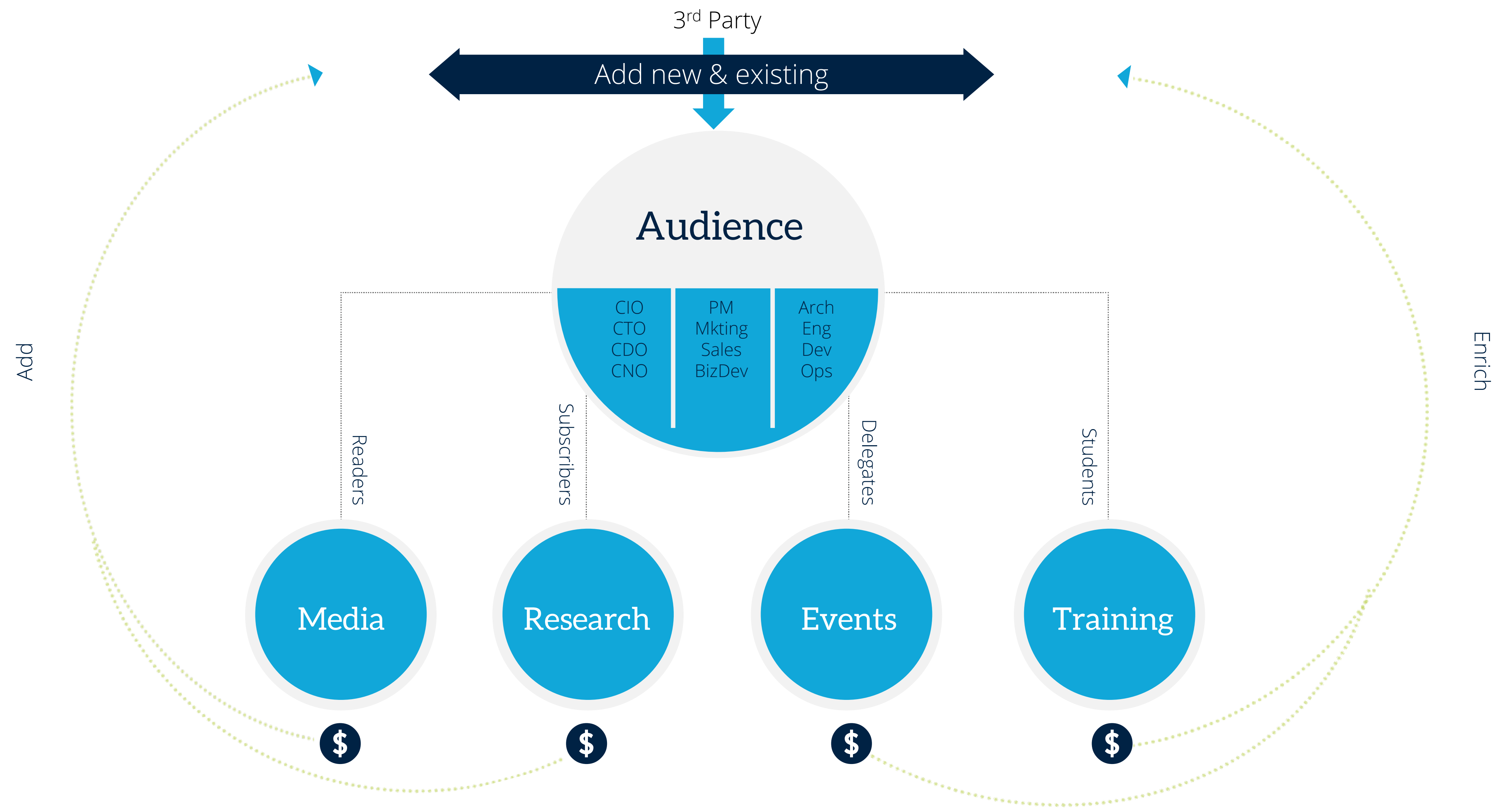
7.4k+
Research Subscribers

18k+
Training Students

Strategy for Growth & Expansion

- Market & Customer led
- Align & Integrate: Common Audiences and Common subject matter
- Content: Write once, run everywhere
- Leverage our Brands
- Cross-pollinate our Audiences
- Sell integrated solutions to our Clients

A Virtuous Circle of Connected, Educated & Informed Customers



Depth & Specialisation across the Technology market

	Critical Communications	Emerging Technologies	Enterprise IT	Marketing Technologies	Media & Entertainment	Security	Service Providers
Media	Urgent Communications; American City & County; Government Procurement	AI Business; WardsAuto; IoT World Today	InformationWeek; Network Computing; Enterprise Cloud; ITPro Today; Channel Futures; No Jitter; DataCenter Knowledge	Content Marketing Institute	DigitalTV.com; TBI Vision; Gamasutra	Dark Reading; Security Now	Light Reading; Broadband World News; telecoms.com; Connecting Africa
Events	IWCE; Mission Critical Technologies; The International Critical Control Rooms Alliance Congress; IoT Saving Lives; Critical LTE Communications Forum	The AI Summit; Startup Elevate; Smart Cities Summit; Smart Home Summit; TU-Automotive Detroit; WardsAuto; Internet of Things World Series	Interop; HDI Conference & Expo; ICMI; Container World; Channel Partners Conference & Expo; Cloud & DevOps World; Enterprise Connect; Data Center World	Content Marketing World 2019 Conference & Expo; Content Tech	VRDC; OTTtv World Summit; XRDC; GDC; Cable Congress; Video Exchange Series	black hat	5G Series; AfricaCom; TechXLR8 Digital Series; Broadband World Forum; ConnecTechAsia; MVNOs Series
Training		Innovation Academy; Telecoms & Tech Academy	Telecoms & Tech Academy	Content Marketing Institute	Telecoms & Tech Academy	black hat Trainings	Telecoms & Tech Academy
Research		Wards Intelligence; Tractica; Ovum	Ovum		Ovum; Heavy Reading	Ovum	Ovum; Heavy Reading

Specialist Markets: 5G

Service Providers

Media: Light Reading; telecoms.com

Events: 5G World; 5G Asia; 5G Africa; 5G MENA; BIG 5G EVENT; 5G & LTE Latin America

Training: Telecoms & Tech Academy

Research: Ovum; Heavy Reading

20k+	165k+	4k+	18k+
Annual Event Delegates	Monthly Media Readers	Research Subscribers	Training Students

Specialist Markets: Artificial Intelligence

Carolyn Dawson
MD, Informa Tech

10 May 2019

Exponential Growth in the Artificial Intelligence Market

The pace of growth for AI continues unabated as use cases start to solidify and companies move from talking about AI to deploying and building solutions
Tractica Analyst

Global Artificial Intelligence Market

- AI software, hardware and services market projected to grow from c$60bn in 2018 to more than $800bn in 2025

Broad industry relevance

- Agriculture, Automotive, Finance, Healthcare, Human Resources, Law, Manufacturing, Marketing, Retail, Security

Ethics debate

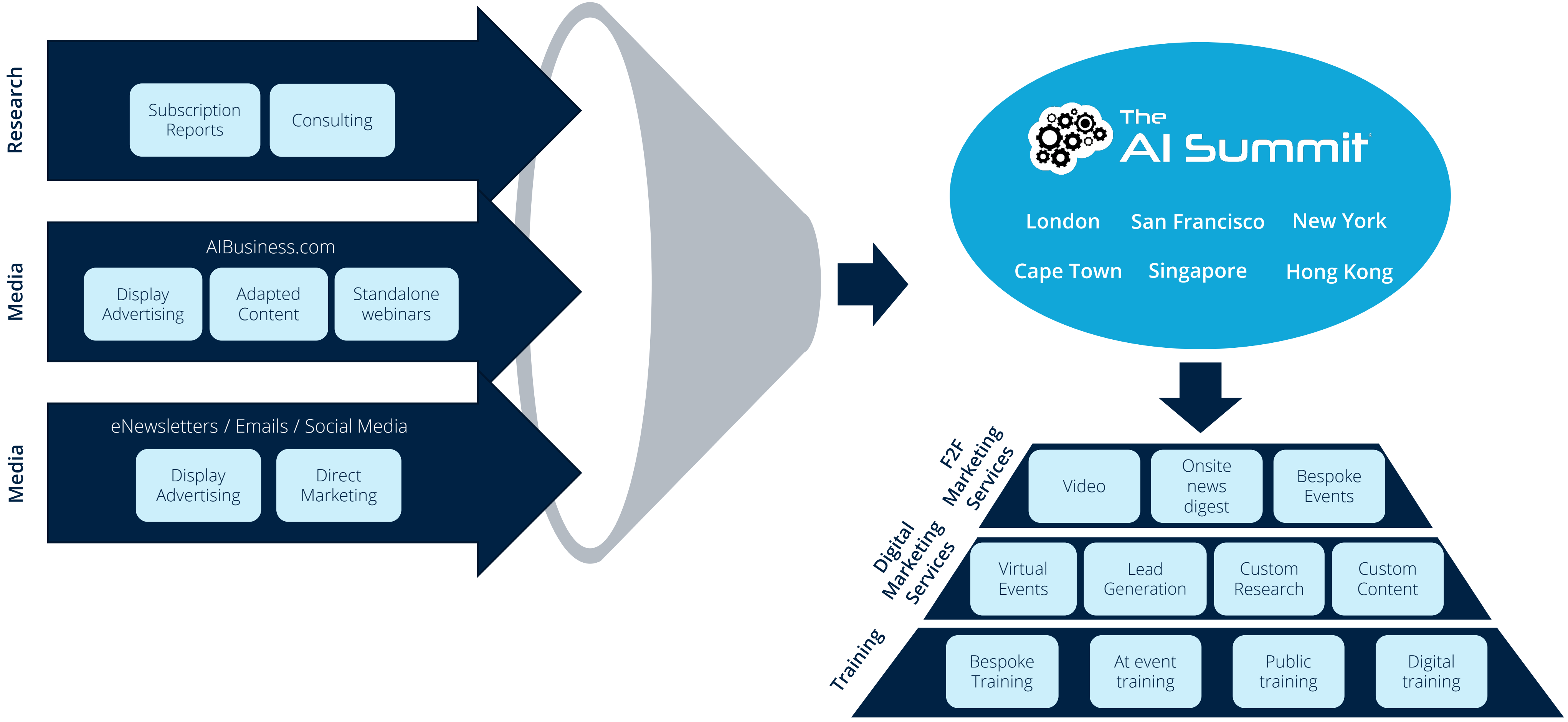
- Machine vs Human

Artificial Intelligence Market ($bn)

Artificial Intelligence Software Market by Region (%)

Source: Tractica

Building Communities in High Growth Markets



AI from Informa Tech

- 28,000+ attendees
- 8 events
- In 6 countries

IN-PERSON EVENTS

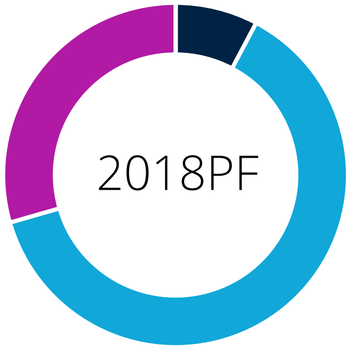
DIGITAL REACH

- Database of 2.2M+
- 12,000 subscribers

£1-12m
Revenue 2016-2019

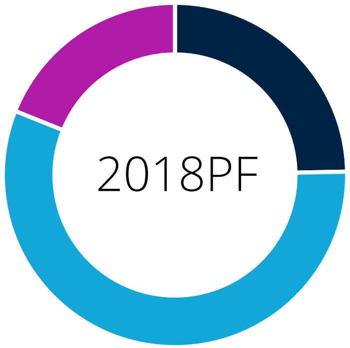
35
International Colleagues

Events Revenue by region



- USA (63%)
- Europe (29%)
- Asia (8%)

Digital Revenue by region



- USA (58%)
- Europe (33%)
- Asia (8%)

Specialist Markets: Cyber Security

Marco Pardi
MD, Informa Tech

10 May 2019

Exponential Growth in the Cyber Security Market

2.6bn+

Records exposed/stolen globally in 2018[1]

> Cybersecurity is in the midst of a perfect storm of demand. Attackers only need to find one chink in an enterprise's armour
> Ovum Analyst

Global Information Security Spending

- Projected to exceed $124 Billion in 2019 – increase of 8.7 percent from 2018

Cost of Data Breaches

- Cybercrime projected to cost businesses over $2 Trillion total in 2019
- Average of $3.86 Million per breach; with large-scale breaches costing $350 Million

Demand for Cybersecurity Skills

- 2.93 Million security jobs open and unfilled globally

High Growth Market Opportunities: Black Hat + Dark Reading

Top Priorities

- Protection
- Detection
- Response

Infosec pros

ROADMAP

Delivering value for attendees and clients while expanding our cybersecurity position

EVENTS

- 2005: UBM Tech acquires Black Hat for $10M
- Flagship event is BH USA; held in Las Vegas for past 21 years
- Expansions:
  - 2000: BH Asia
  - 2000: BH Europe

TRAINING

- Critical component of Black Hat content program
- Expansions:
  - Washington DC (2017) Chicago (2018)
  - Launching in Japan 2019/2020

MEDIA

- 2006: Dark Reading launches as online publication dedicated solely to covering enterprise security, complementing Black Hat event series
  - Expansions: webinars, virtual events, newsletters, podcasts

+ New: Informa Tech's Security Now

RESEARCH

- 2008: Dark Reading launches research reports
  - Annual reports include Salary Survey and Strategic Security study

+ New: Informa Tech's OVUM

The Collective Power of Black Hat + Dark Reading

Black Hat USA + Dark Reading
2018 Collaboration Example

Research

- Attendee survey garnered global media coverage

Content

- Dark Reading News Desk streamed live on website
- Dark Reading workshop sessions attended by 175+ delegates
- Dark Reading's Show Daily sent to 60,000+ security pros
- 41 related articles on Dark Reading
- 500+ scans of delegates interested in Dark Reading e-newsletters
- Dark Reading presentation at CISO Summit

Overall results

c.$70m
2018 Combined Revenue

102%
Combined growth over 5 years

270,000
Audience Community

900+
Customer Community