



Example Gap Analysis

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August 5, 2016

Table of Contents Example Gap Analysis

Example of Table of Contents	3
Example of Territory Update	4
South East Asia	4
Example of Marketing and Sales Advice	7
Example of Sales Potential Overview.....	11
Example of Territory Breakdown	12

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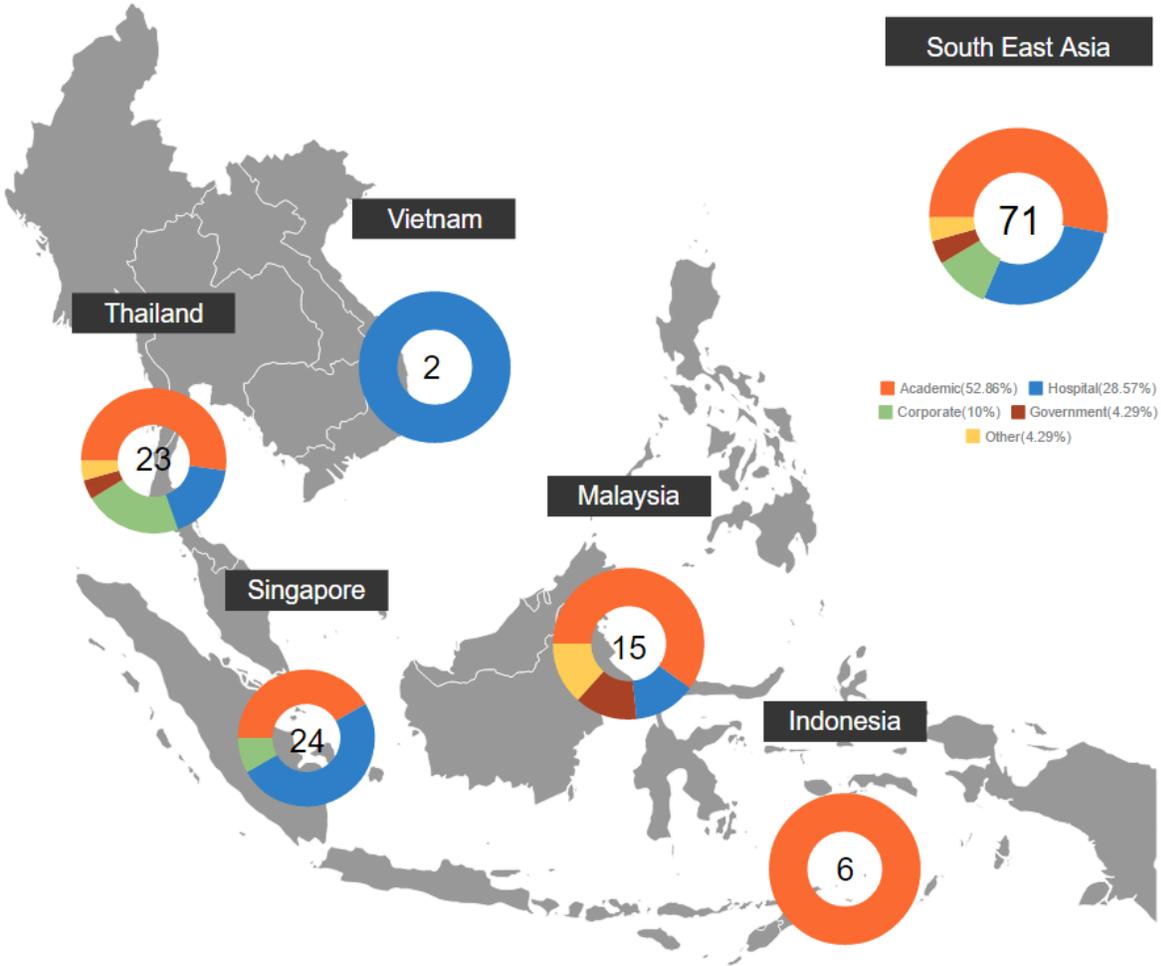
Example of Table of Contents

Executive Summary	3
Introduction and Methodology	4
World Overview	5
Territory Updates	8
Africa	8
Europe	14
Southern Europe	17
The United Kingdom and Ireland	21
Central and Eastern Europe	25
Scandinavia	28
Turkey	32
Benelux	34
DACH	37
Italy	41
India, Sri Lanka and Pakistan	45
Latin America	52
North America	62
USA	63
Canada	66
Asia Pacific	69
Australasia	71
China	74
Hong Kong, Taiwan and Macau	78
Japan	81
South East Asia	85
South Korea	89
The Middle East	93
Marketing and Sales Advice	98
Work Advised by ACCUCOMS	101

Example of Territory Update

South East Asia

Current status of subscriptions in South East Asia



	Total subscribers	Academic	Hospital	Corporate	Government	Other
Malaysia	15	9	2	0	2	2
Thailand	23	12	4	5	1	1
Indonesia	6	6	0	0	0	0
Vietnam	2	0	2	0	0	0
Singapore	24	10	12	2	0	0

Financial overview and market summary of South East Asia

Malaysia is generally experiencing high growth rates these years. Though the growth rate has fallen from 6% in 2014 to 4% in 2015, it is expected that it will climb again by the

beginning of 2017. GDP per capita is \$10,200, which is the 2nd highest in South East Asia. Higher education institutions have had their budget cut by \$573 million, from \$3.8 billion in 2015 to \$3.2 billion for the year 2016. The various university libraries, in the more than 20 medical schools running clinical medicine and specialties, have therefore been forced to cancel parts of their collections.

Thailand's economy faces headwinds and the growth rate has been recorded at a modest 2.8% in 2015 after a horrible 0.9 % in 2014. It is expected that economic growth will increase to 3% in 2016. The overall budget allocated to higher education has been stable the last years and tertiary education budgets are set to increase with 9.5 % for 2016. Thailand has 22 Institutions that offers medical education. ThaiLIS (Thai Library Integrated System Consortium) is the university consortium of 28 Universities funded by the government and EIFL-Thailand (Electronic Information for Libraries in Thailand) is an open-ended consortium of 90+ institutes in Thailand.

Indonesia's 2016 budget shows continued domestic optimism. The economic growth target has, however, been adjusted downward due to an adverse external financial environment. The government remains optimistic about the country's overall growth potential. GDP per capita is US\$3,509. Indonesia is emerging as a destination for medical education with many Southeast Asian students enrolled in the country's more than 30 medical schools.

Vietnam's economy continued to grow stronger throughout 2015. It is estimated that the GDP will grow with 6.7% for 2016. Vietnam is one of the most populous countries in Southeast Asia. Medical education is being prioritized, so the government have opened special budgets for medical education. GDP per capita is \$1,374. The government runs 150 government higher education institutes.

Singapore's economy continues to look weak in Q1 of 2016. The government believes that a slightly increasing government spending will give the country a boost, but it seems to be a problematic course in relation to a relatively low unemployment rate. Singapore has two medical schools with over 2,000 medical students. WHO has declared the healthcare facilities in Singapore as the "Best in Asia" and "Sixth Best in the world". Currently, Singapore has 13 private hospitals, 10 public hospitals and several specialist health centers.

With a population of more than 600 million and both a growing economy as well as growing academic output, South East Asia does not take up many subscriptions. Because of the relative low market penetration and the high growth rates in the area, there is a genuine potential to grow sales in the territory. Building up personal relationships with decision-makers in key positions, will enable X-Society to take advantage of the impressive brand recognition in the region to grow sales significantly in the coming years. The countries with the best sales potential are Thailand, Indonesia and the Philippines. Especially the Thai market is suitable for promotion campaigns, because medical research is highly prioritized by the current government.

Market overview – Important academic institutions in South East Asia

Country	Institution	Current holdings
Singapore	National University of Singapore	XY, YY, XX
Singapore	Nanyang Technological University	XY, YY, XX
Thailand	King Mongkut's University of Technology Thonburi	XY, YX
Thailand	Mahidol University	XY, YX, XX, YY
Malaysia	Universiti Malaya	XY, YX
Malaysia	Universiti Sains Malaysia	None
Thailand	Chulalongkorn University	XY, YY, XX
Malaysia	Universiti Kebangsaan Malaysia	XY
Malaysia	Universiti Teknologi Malaysia	XY
Philippines	University of the Philippines	XY

It is obvious that X-Society has a strong brand in the territory as all major South East Asian academic institutions are subscribing to XY except Universiti Sains Malaysia. Only Mahidol University in Thailand, however, has access to *all* the journals published by X-Society. As all the high ranking universities are growing and they are competing for being recognized as the best university in the region, an upsell campaign focusing on the absolute top universities should be successful. Upselling to the current subscribers will also help sales across the region as the top universities function as benchmarks for less recognized, but ambitious, universities.

Important consortia in South East Asia

- **ThaiLIS** (Thailand)
- **MOLEC** (Malaysia)
- **EIFL-Thailand** (Thailand)

Consortia have yet not become dominant factors for libraries in South East Asia. The Thai Library Integrated System Consortium (ThaiLIS) is an important university consortium in Thailand. The consortium has 28 members, all universities, and it is funded by the Thai government. The Malaysian Online E-Resources Consortium is another significant consortium. The consortium has 32 members that are mostly universities and government libraries in Malaysia.

Top Prospects in South East Asia

Country	Top prospects	Sector
Malaysia	Universiti Sains Malaysia (USM)	Academic
Malaysia	University Malaya Medical Centre	Academic
Indonesia	University of Indonesia	Academic
Indonesia	Airlangga University	Academic
Thailand	Ubonrajathanee University	Academic
Thailand	Prasart Neurological Institute of Thailand	Academic

Philippines	Angeles University Foundation	Academic
Philippines	University of Santo Tomas	Academic
Vietnam	Bac Thai Medical School	Academic
Vietnam	Can Tho University (CTU), School of Medicine	Academic
Singapore	National Environment Agency	Government
Singapore	Jurong Health Services PTE LTD	Hospital

Across the region there are many large academic institutions as well as teaching hospitals that do not have access to any content from X-Society. In the above table the largest and most important institutions without any X-Society content have been highlighted. In the appendix with prospects more information on the opportunities has been collected.

Important trade shows and conferences in South East Asia

Location	Month	Event Name	Expected no. of attendees
Thailand	Feb	PULINET	200
TBD	2018 Aug	Congress of Southeast Asian Librarians (CONSAL)	600

Summary South East Asia

The South East Asian economy is growing and the national governments in the region are jockeying to establish themselves in front of the others on the regional and global agenda. It is therefore important to begin now to build up personal relationships with librarians at the top institutions in the region. By doing so, X-Society will be able to translate strong brand recognition into significant sales in the coming years as the economies continue to mature. Doing so demands qualitative regional knowledge of local languages and traditions.

There is a nice potential for growth across the countries in the region, but Thailand, Indonesia and Philippines are the three main countries to focus on, as most public institutions in the three countries have experienced stable budget increases through the last years.

Example of Marketing and Sales Advice

Customized Marketing and Sales Advice for X-Society. Every product and every territory is unique so ACCUCOMS will pull on all its industry knowledge and resources to offer advice on how to develop brand awareness and presence. ACCUCOMS has grouped the advice under the following headlines: Conferences and Exhibitions, Online Marketing, TeleSales/TeleMarketing, Print Marketing, Pricing and General.

Conferences and Exhibitions

- Conferences and exhibitions are important for brand awareness; X-Society should attend the following worldwide subject specific conferences in 2017:
 1.
 2.
 3.
 4.
 5.
 6.
- In order to use conferences successfully, X-Society needs to valorize the booth branding by improving:
 1. Showstoppers
 2.
 3.
 4.
 5.
 6.
- Different types of giveaways (rather than the traditional pens) are much appreciated by librarians, the following can be used instead:
 1. USB power banks
 2.
 3.
 4.
- Dedicated presentation slot to promote X-Society content
- Participation at conference sessions to promote X-Society content and experiences

Online Marketing

- Specialized webinars: inviting experts such as decision makers and influencers who can answer questions regarding the content whilst a X-Society representative can refer to queries on usage and subscription options
- Social Media Marketing and communication reinforcement to create a community in order to offer support, to follow up on trials and to share new information from journals
- Investigate the possibility of prospects from within the Facebook/Twitter/social media followers – follow up with a campaign to convert these prospects into subscribers
- Start a paid *Facebook* advertisement campaign to reach potential prospects in countries of interest

- Email campaign showcasing X-Society and its various products to all prospects in various local languages
- Email campaigns to current and potential customers highlighting the specific topics of interest to them (further segmentation of the database to allow for this would be beneficial)
- Send top articles to researchers every month with related key subjects
- Advertisements on top portal sites of local countries

TeleSales/TeleMarketing

- Call customers proactively to discuss any customer service issues and to remind the customer of the benefits the various products bring
- Calling campaigns in native language to new prospects to introduce content, offer trials, give quotes and confirm interest
- Renewal follow-ups with upsell option
- General introduction and trial offers
- Department level calling for recommendations – based on Authors contributions

Print Marketing

- Prepare local language “awareness” promotional material and circulate widely
- Banners with high resolution images highlighting the usage and benefits

Pricing

- In North America: Special pricing for lower academic colleges like community colleges as the content is high level and the use per cost does not justify a subscription for these types of institutions
- Make multiyear deals with “A”- customers
- Offer better price conditions for new customers with multi-year agreements

General

- Personalized and interactive approach with clients
- Platform presentations
- Local language promotional materials: infographics, subtitles for videos, webcasts, podcasts
- Collect quotes and recommendations to add in promotional material and on the website
- Organize site visits to give presentations to libraries
- Seminar on X-Society and its products. It should be targeted at researchers to show how the journals can aid them in their research and how to submit articles
- Approach all consortia in order to make deals and build up small consortiums. Special focus should be offered to the following consortia:
 1.
 2.
 3.

4.
- Contact all existing subscribers for upsells
 - Review lapsed subscribers to offer discount on reinstating subscriptions

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Example of Sales Potential Overview

ACCUCOMS Sales potential overview X-Society												
Deliverable:	Sales potential overview											
Contact Person:	Simon Boisseau (simon@accucoms.com)											
	Europe	North America	Latin America	Africa	Middle East	South East Asia + Hong Kong, Macau and Taiwan	China	Australasia	Japan	India, Pakistan and Sri Lanka	South Korea	
Current subscribers to XY	1,100	900	200	20	70		100	250	50	300	150	100
Average FTE per organization in territory	8,784	8,647	8,419	23,685	19,000		7,607	13,589	12,784	6,067	2,788	7,731
Total FTE reached in territory	9,662,400	7,782,300	1,683,800	473,700	1,330,000		760,700	3,397,250	639,200	1,820,100	418,185	773,100
Population	800,000,000	400,000,000	630,000,000	1,000,000,000	127,000,000		618,000,000	1,357,000,000	28,000,000	127,000,000	1,400,000,000	50,000,000
% of population w/ access to XY	1.21%	1.95%	0.27%	0.05%	1.05%		0.12%	0.25%	2.28%	1.43%	0.03%	1.55%
SciVal scholarly output 2015	907,000	693,368	130,000	70,000	137,000		84,000	439,000	102,000	118,500	139,000	78,000
Research output per subscriber:	825	770	650	3,500	1,957		840	1,756	2,040	395	927	780
Research output development	Stable	Slightly decreasing	Increasing	Increasing	Increasing		slightly increasing	Stable	Stable	Decreasing	Increasing	Slightly increasing
Research output per FTE with access to con	0.09	0.09	0.08	0.15	0.10		0.11	0.13	0.16	0.07	0.33	0.10
Upsell candidates	250	100	50	10	40		50	60	40	60	50	30
Prospects	500	50	150	90	50		20	20	30	10	50	5
Economic status	Strong	Strong	Weak	Weak	Varied		Varied	Strong	Strong	Strong	Weak	Strong
Economic forecast	Stable/low growth	Stable/low growth	Growing	Growing fast	Growing		Growing fast	Growing fast	Stable/low growth	Stable/low growth	Growing fast	Stable/low growth
Gaps	No	No	Yes	Yes	No		Yes	Yes	No	No	Yes	No
Satuation	Saturated	Saturated	Not saturated	Not saturated	Not saturated		Not saturated	Not saturated	Saturated	Saturated	Not saturated	Saturated
Short term focus	Small universities and the corporate market	Upsell candidates and subscriber retention	Potential outside Brazil	Academic sector	Academic- and medical sectors		Emerging universities and medical sector	Academic sector	Marginal universities and corporate sector	Customer retention and upsell	Academic sector	Customer retention and upsell

Example of Territory Breakdown

ACCUCOMS		Current status and subscription distribution in South East Asia and South Korea	
Deliverable:	Subscription breakdown - SEA and South Korea		
Contact Person:	Simon Boisseau (simon@accuoms.com)		

South Korea

Subscribers in South Korea					
Institution type:					
Academic				130	65%
Hospital				25	13%
Corporate				25	13%
Government				15	8%
College				5	3%
Total amount of subscribers in South Korea				200	100%

Subscriptions in South Korea	XY- Journal	YX- Journal	XX- Journal	YY- Journal	Total amount of standing subscriptions per sector in South Korea
Institution type:					
Academic	110	70	20	25	225
Hospital	20	20	0	5	45
Corporate	25	5	0	0	30
Government	10	15	10	10	45
College	5	5	0	0	10
Total	170	115	30	40	355
% of total subscriptions in territory	48%	32%	8%	11%	

South East Asia

Subscribers in South East Asia					
Institution type:					
Academic				50	68%
Hospital				10	14%
Corporate				5	7%
Government				8	11%
College				0	0%
Total amount of subscribers in SEA				73	100%

South East Asia	XY- Journal	YX- Journal	XX- Journal	YY- Journal	Total amount of standing subscriptions per sector in SEA
Institution type:					
Academic	50	15	20	5	90
Hospital	10	5	5	5	25
Corporate	5	5	0	5	15
Government	8	0	0	0	8
College	0	0	0	0	0
Total	73	25	25	15	138
% of total subscriptions in territory	100%	34%	34%	21%	

Subscriptions Vs Subscribers					
Individual subscribers in SEA and South Korea					273
Subscriptions in total					493
Subscriptions per subscriber in average					1.8