



Freedonia Focus Reports
Global Collection

Global Scientific, Technical, & Medical Online Services

January 2020



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About This Report

Scope

This report forecasts global revenues of scientific, technical, and medical (STM) online services by product in nominal US dollars to 2023. To illustrate historical trends, total revenues and product segments are provided for 2016-2018. Product segments for both scientific and technical as well as medical online services include:

- online content
- abstracting and indexing (A&I) services

World regional shares of STM online service revenues for 2018 are provided for North America, Europe, Asia/Pacific, and the rest of the world.

Sales are global and include the online content and A&I services serving STM markets. The market is overwhelmingly English language, but this report includes sales in all languages. The largest non-English markets are produced in Portuguese, Japanese, German, French, Spanish, and Chinese.

Freedonia quantifies trends in various measures of growth and volatility. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

A full outline of report items by page is available in the Table of Contents.

Sources

Global Scientific, Technical, & Medical Online Services (FW25024) is based on a [comprehensive industry study](#) published by Simba Information. Simba used a combination of secondary research and competitor interviews to gather financial data. The team obtained and analyzed secondary data (marketing material, company statements, press releases, mentions in the press, etc.) to gain a comprehensive understanding of each competitor. Simba also consulted industry experts: editors/analysts that cover the professional publishing and content industry. Simba contacted various levels of management and product management at competitor organizations to get detailed product descriptions, pricing, sales figures, market share data, and delivery options, as well as strategic information they may provide.

When reported information was not available, estimates were based on historical trends, directional guidance by executives (weak, flat, etc.), size of competitors, relative size based

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on customer observations, number of titles, and library-spending studies for individual publishers. Simba also accessed its database of STM executives to gather intelligence on companies that did not publicly disclose financial data. In addition, Simba's research team conducted searches of online news databases (including LexisNexis, Bloomberg, Wall Street Journal Online, Hoover's, DueDil, and Google) to obtain some figures and estimates.

Estimates of sales and projections were based on classification of revenue into component categories as well as geographic splits. Guidance from analysts, annual reports, 10-Ks, and industry insider observations of growth or weakness were then applied. Currency movements and merger and acquisition (M&A) activity also played an important role.

Simba's forecast methodology is similar to its approach to building actual global market size numbers. Simba discusses trends and insights with industry executives and researches secondary sources, analyst reports, and industry studies.

Principal forecast drivers are:

- extrapolation of recent trends
- M&A activity
- global and national gross domestic product (GDP) forecasts
- industry forecasts
- company forecasts
- publishing trends

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 4 | NAICS & SIC Codes Related to Scientific, Technical, & Medical Online Services

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
511120	Periodical Publishers	2721	Periodicals: Publishing, or Publishing & Printing
511130	Book Publishers	2731	Books: Publishing, or Publishing & Printing
511210	Software Publishers	2741	Miscellaneous Publishing
519130	Internet Publishing & Broadcasting & Web Search Portals	7372	Prepackaged Software

Source: US Census Bureau

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Resources

Simba Information

Global Medical Publishing 2019-2023

Global Scientific & Technical Publishing 2019-2023

Global Social Science & Humanities Publishing 2018-2022

Open Access Book Publishing 2018-2022

Open Access Journal Publishing 2018-2022

Publishing for the Mobile Professional 2018-2021

Scholarly & Professional E-Book Publishing 2018-2022

STM Online Services 2019-2023

The Freedonia Group

Freedonia Industry Studies

Global Disposable Medical Supplies

Global E-Commerce

Global E-Commerce Packaging

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Global Pharmaceutical Packaging

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Books: United States

Commercial Printing: United States

Global Demographics

Global Electronic Medical Records

Global Healthcare

Global Macroeconomy

Medical Equipment & Supplies: United States

Medical Services: United States

Pharmaceuticals: United States

Freedonia Custom Research

Trade Publications

Book Business

Digital Book World

Drug Development & Delivery

Health Facilities Management

Medical Device & Diagnostic Industry

Modern Healthcare

*Printing Impressions
Provider*

Agencies & Associations

Association of American Publishers

Eurostat

Healthcare Information and Management Systems Society

International Association of Scientific, Technical, and Medical Publishers

International Monetary Fund

National Information Standards Organization

Organisation for Economic Co-operation and Development

Society for Scholarly Publishing

World Bank

World Health Organization