



ABC Market Sector Report July - December 2009

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Important Note:

ABC data does not cover the magazine market in its entirety as the overall number of titles that audit each period will vary. The analysis in this report also excludes titles whose newstrade sales are less than 20% of their total ABC.

The sector pages focus on UK newstrade volume and revenue only and therefore exclude all overseas, subscription, bulk and free copies. The Total ABC figures quoted in the data tables, however, do include sales from every channel.

UK revenue figures are calculated using UK newstrade volume figures and cover price data supplied by ABC. Annualised figures also use the number of issues in the period for each title and combine the JJ09 and JD09 releases.

Some ABC sectors or sub-sectors have been split into further sub-sectors to allow for more pertinent analysis, though only the terms ‘sector’ and ‘sub-sector’ are referred to throughout.

All the above sectors are ranked in the top 20 for UK newstrade revenue.

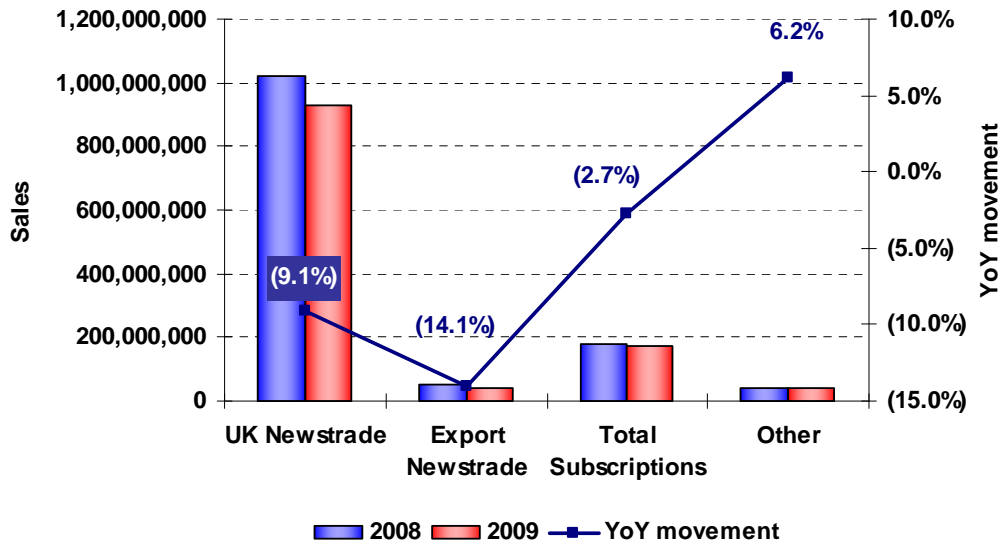
For the **Total Market**, **Export** and **Subscriptions** analysis the 20% exclusion is waived to properly account for complete ABC performance. Titles whose ‘Other’ distribution has a greater than 90% share are still excluded to avoid huge volumes of frees and bulks skewing the market analysis.





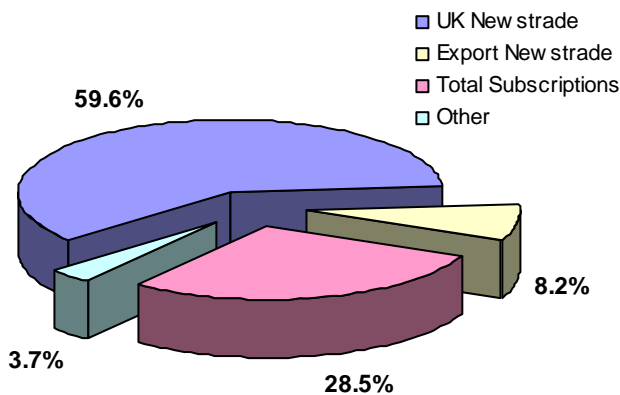
Total ABC Breakdown

2009 vs 2008 ABC Market Performance

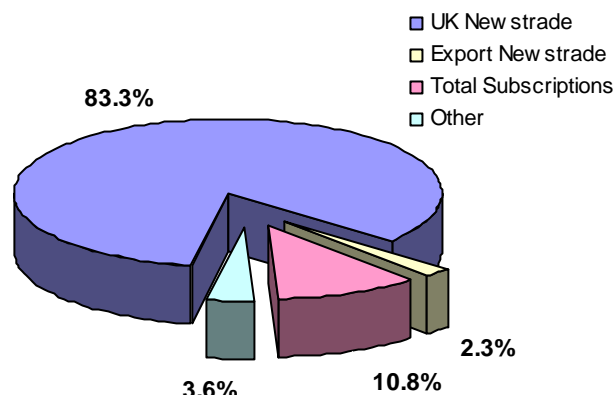


- ▶ Total ABC circulation stands at **1.2 billion** for 2009, a decline of **(8.0%)** YoY. Declines across the UK newstrade, export newstrade and total subscriptions channels demonstrate the challenging nature of the magazine marketplace. ‘Other’ distribution methods, such as bulk and free copies, was the only component of the ABC not to experience YoY decline.
- ▶ Overall UK newstrade sales declined at a greater rate than the total ABC market, falling by **(9.1%)** YoY to equal **927.4 million** copies.
- ▶ The relationship between UK newstrade, export newstrade, total subscriptions and other ABC constituents varies by frequency and is detailed in the charts below.
- ▶ In 2009 the UK newstrade’s share of the total ABC fell by **(1.0%)** point for the weeklies market and **(1.5%)** points for the monthlies market. For monthlies, share was gained by the export newstrade and total subscriptions channels, with total subscriptions and ‘other’ distribution gaining share for the weeklies.

ABC BREAKDOWN MONTHLIES - 2009



ABC BREAKDOWN WEEKLIES - 2009

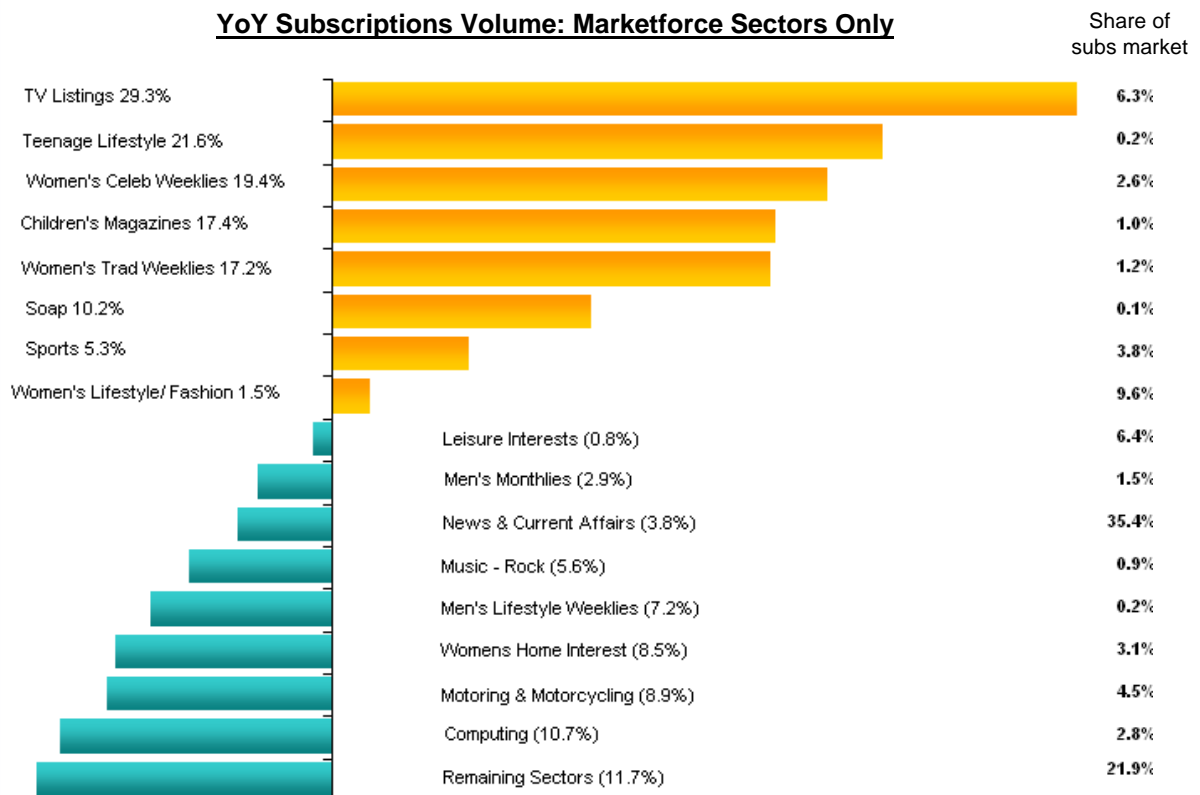




Subscriptions Overview

- ▶ The subscriptions market has grown its share of the total ABC market by **0.8%** points on 2008, to now represent **14.6%** of the total ABC market.
- ▶ Demonstrating a **(2.7%)** YoY decline, the magazine subscriptions market totalled sales of **173.0m** in 2009. This captures both UK and export subscriptions.
- ▶ Declines in the subscriptions market have been driven by the poorer performance of monthly frequency titles. Monthlies declined by **(4.9%)** YoY, compared to a **(1.2%)** decline in the weeklies market. The relative market share now stands at **41.5%** for the monthlies and **58.5%** for the weeklies.
- ▶ Despite a **(3.8%)** YoY decline, the **News & Current Affairs** sector still dominates the subscriptions market, with a **35.4%** market share. Subscriptions comprise **60.7%** of the total ABC within the **News & Current Affairs** sector.
- ▶ Representing **6.3%** of the subscriptions market, the **TV Listings – UK** sector experienced YoY growth of **29.3%**. This growth has enabled the sector's share of sale through the subscriptions channel to increase from **3.3%** to **4.6%**.
- ▶ The **Retirement** sub-sector, part of **General Interest**, is most reliant on subscription sales, with over **95.0%** of its total sales coming through this channel.
- ▶ In terms of volume, the **Women's Traditional Weeklies** sector has the largest total ABC circulation, but interestingly it relies on just **0.7%** of its sales coming from the subscriptions channel.

YoY Subscriptions Volume: Marketforce Sectors Only





Export Newstrade Overview

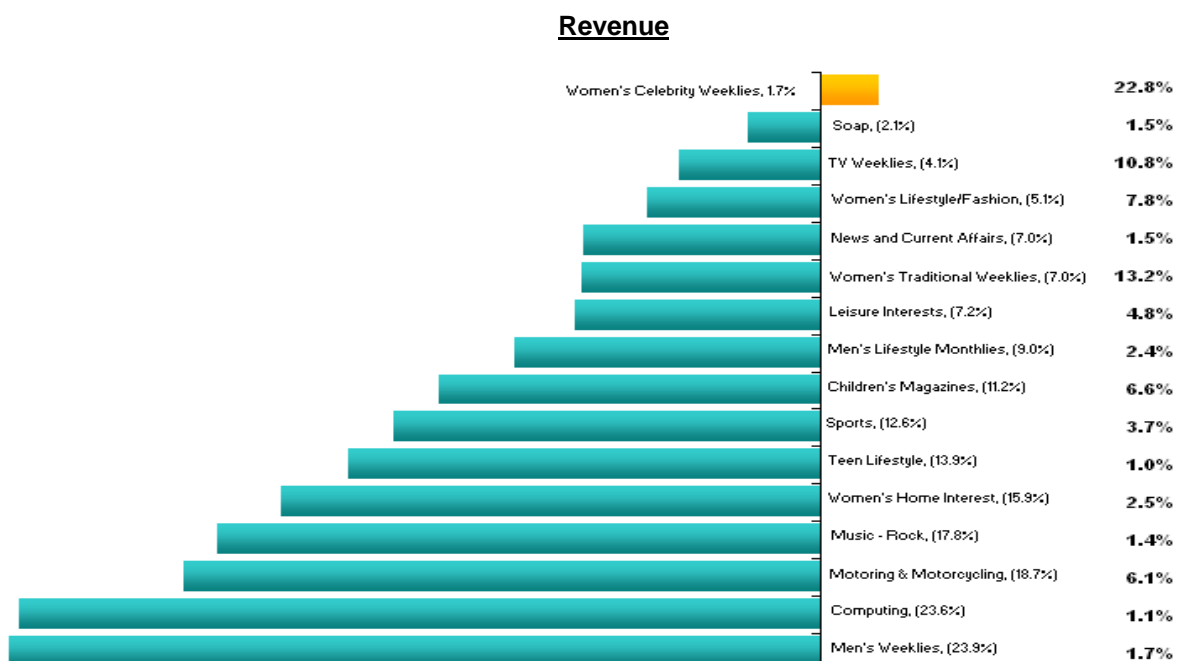
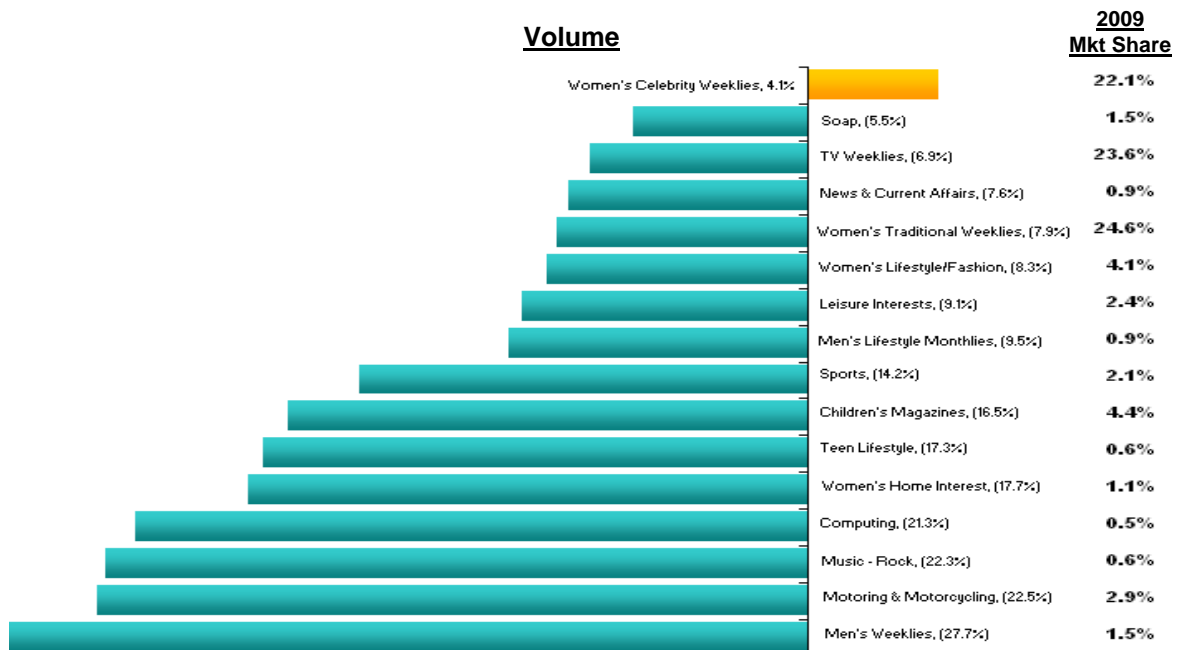
- ▶ In 2009 the export newstrade accounted for **42.6m** copies, representing a YoY decline of **(14.1%)**.
- ▶ Export newstrade sales now represent **3.6%** of the total ABC market, which is a slight decrease of **(0.2%)** on 2008.
- ▶ The weeklies market suffered greater declines than the monthlies market, showing respective declines of **(19.8%)** and **(7.1%)** YoY. Weekly frequency titles still hold a greater share of the market at **51.3%**, with the monthly titles increasing their market share by **3.7%** points to **48.7%**.
- ▶ Despite a decline of **(15.8%)** YoY, *Hello* remains the most popular export title, selling **2.7m** copies in 2009. *The Economist (Continental Europe and Asia Pacific editions)*, *Woman's Weekly*, *Time Magazine (EMEA)* and *People's Friend* also sold more than **one million** export copies.
- ▶ **News & Current Affairs** still dominates the export market, with sales through this channel accounting for **9.4%** of this sector's total ABC. This is despite a YoY decline of **(14.1%)**. The **News & Current Affairs** and **Women's Weeklies** sectors' combined sales account for just under half of the export market, at **48.6%**.
- ▶ Whilst export sales of **Children's Magazines** were very successful in 2009, increasing by **31.2%** YoY, it is important to note that less than **1.0%** of the sector's sales come through the export channel.
- ▶ Faring slightly better within the export market than on the UK newsstand, the **Men's Weeklies** sector also experienced YoY growth. However, as the sector only gains **3.0%** of its sales through export, this did not help to offset the decline within its UK and total ABC volumes.

YoY Export Newstrade Volume: Marketforce Sectors Only



Market Sector Introduction

- ▶ The UK ABC newstrade magazine market was worth **£1.35 billion** during 2009, a fall of **(9.7%)** YoY. Volume sales dropped by **(9.1%)** YoY to **924.0 million** copies with **Women's Celebrity Weeklies** the only market sector in YoY growth. However the sector witnessed significant discounting during the period and an increase in copies sold below basic cover price contributed to this rise. **Soap** and **TV Weeklies** show the smallest YoY declines while **Computing, Music – Rock, Motoring & Motorcycling** and **Men's Weeklies** suffer the largest falls.
- ▶ The graphics below illustrate the annualised YoY UK newstrade performance for 2009 for a selection of key market sectors, with market share shown on the right hand side. These sectors accounted for **93.9%** of 2009 UK newstrade volumes and **89.0%** of revenues.



Women's Celebrity Weeklies

The **Women's Celebrity Weeklies** sector produced total UK newstrade volumes of **204.2m** copies in 2009. This represents an impressive YoY increase of **4.1%**.

The sector saw a growth of **1.7%** in RSV, bringing the 2009 total to **£306.4m**. The **Women's Celebrity Weeklies** is the highest ranked and also the best performing of all the sectors in terms of both volume and RSV, therefore contributing significantly to the value of the magazine market as a whole.

2009 Annualised Performance

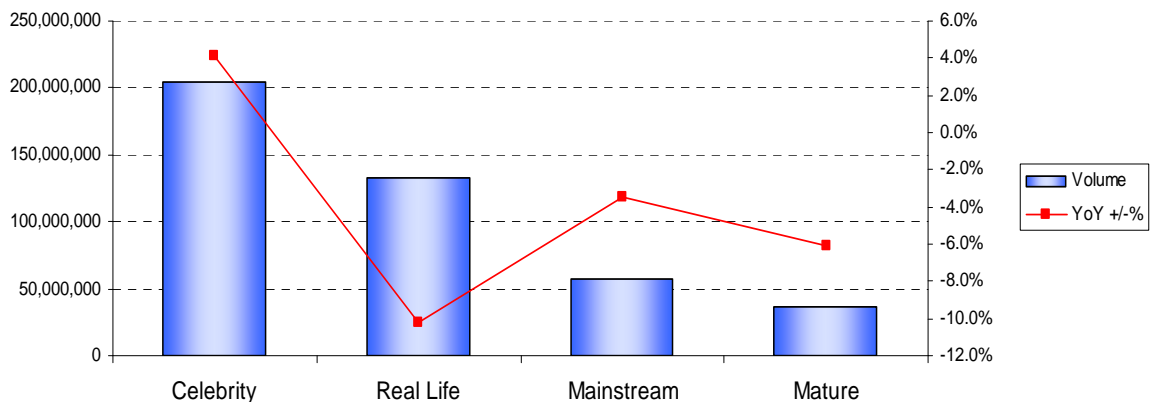
Number of Titles in 2009:	12
ABC Sector RSV Rank:	1
2009 Annual RSV:	£306.4m
2009 Annual RSV YoY:	1.7%

Please note the above figures relate to UK newstrade performance for the whole of 2009

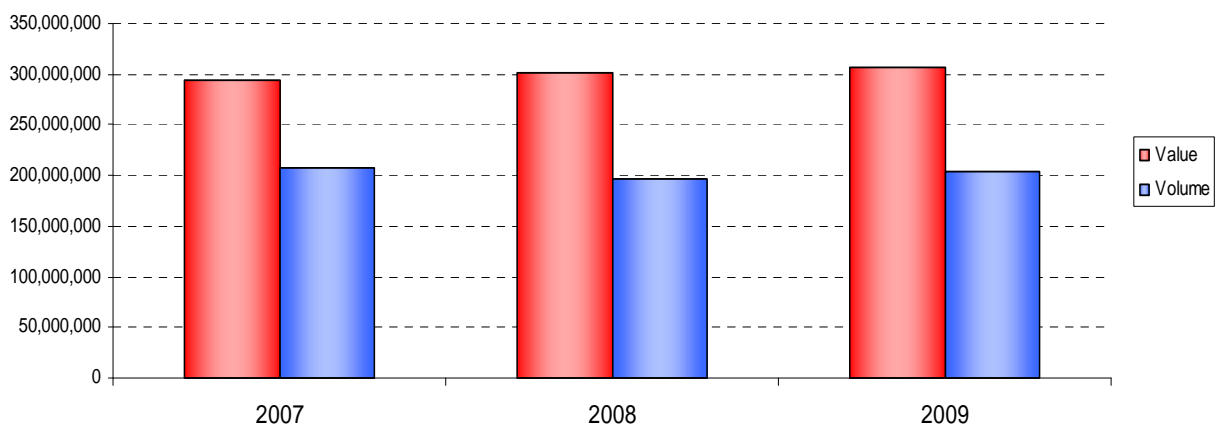
The **Women's Celebrity Weeklies** has been a dynamic and expanding sector in **JD09**. There has been significant movement within the title rankings due to some titles posting very large YoY and PoP increases. The key driver behind this strong growth has been frequent discounting from the standard cover prices. This indicates that consumers are savvy shoppers that are attracted to bargain offers as impulse purchases and do not tend to remain loyal to one particular brand.

The RSV growth highlights the fact that despite the turbulence in the economic climate over the past few periods, consumers are not sacrificing their weekly celebrity fix. Consumers are willing to buy these weekly magazines as a small, affordable treat but what they are really looking for is as much value for their money as possible.

2009 Women's Weeklies Sub-Sector Performance
Annualised UK Newstrade Volume



Celebrity Sub-Sector Performance - Last 3 Years
Annualised UK Newstrade Value & Volume



Key Title	Jul-Dec 2008		Jan-Jun 2009		Jul-Dec 2009		PoP Change	YoY Change
	UK News	Total ABC	UK News	Total ABC	UK News	Total ABC	UK News	UK News
New!	434,789	442,996	388,926	400,189	587,227	600,741	51.0%	35.1%
Closer	526,814	539,991	517,528	530,371	527,601	539,135	1.9%	0.1%
OK! Magazine	475,257	508,504	545,256	599,847	522,685	588,546	-4.1%	10.0%
Star	259,730	268,292	307,407	317,940	477,862	492,067	55.4%	84.0%
Heat	434,348	470,475	409,257	445,192	422,881	458,858	3.3%	-2.6%
Now	409,026	433,509	370,633	384,356	372,637	394,130	0.5%	-8.9%
Reveal	262,452	270,014	311,101	315,660	323,877	330,911	4.1%	23.4%
Look	301,625	314,329	305,391	315,410	299,551	313,013	-1.9%	-0.7%
HELLO!	251,728	423,649	220,852	397,634	230,618	409,043	4.4%	-8.4%
Grazia	182,324	227,156	182,554	228,694	187,502	229,732	2.7%	2.8%
More!	173,140	181,260	177,539	190,708	179,278	192,860	1.0%	3.5%
National Enquirer - UK Edition	80,060	80,454	79,652	79,669	76,502	76,504	-4.0%	-4.4%

Title Performance

- *New!* has stolen the top spot from *OK! Magazine* after recording massive increases in its average sale, up **35.1%** YoY and **51.0%** PoP to give it a UK newstrade ABC of **600,741**. It has climbed three places from its 4th ranked position in JD08. However, although *New!*'s standard JD09 cover price was 85p, over 31% of its sales in this period came from discounted copies.
- *Closer* maintains its position as the second highest selling title of the celebrity weekly magazines, posting a JD09 circulation of **527,601**, representing small increases of **0.1%** YoY and **1.9%** PoP.
- Now ranked third in the sector is *OK! Magazine*, which, with a UK newstrade figure of **522,685**, saw a YoY increase of **10.0%** but a PoP fall of (**4.1%**). However the title discounted more than any other in the sector with **56%** of its UK newstrade sale auditing at below its standard cover price. Given this itself dropped by **35p** in 2009 to **£2.60**, it follows that RSV has not followed the same pattern as JD09's healthy volume growth.
- *Look* has maintained a relatively steady circulation over the past three periods with its JD09 UK newstrade figure of **299,551** only down a marginal (**0.7%**) YoY. A November cover price increase of **10p** to **£1.60**, however, meant that annualised RSV saw strong growth of **5.8%** YoY. *Look* retains its position as the number one fashion weekly by a margin of over **100,000** copies.
- Of all of the celebrity weeklies, *Star* experienced the most impressive growth and was the highest climbing title. It posted a JD09 UK newstrade figure of **492,067**, which was up **84.0%** YoY and **55.4%** PoP. In a similar fashion to *New!*, however, *Star* relied heavily on discounted copies and just under **40%** of its audited sales figure were on special offer.
- Other positive performances came from *Reveal*, up **23.4%** YoY, *Grazia*, up **2.8%** YoY and *More*, up **3.5%** YoY, showing the buoyancy of this sector in **JD09**.
- *Now* recorded an average UK newstrade sale of **372,637**, which although down YoY, represented a PoP increase of **0.5%**.
- *Hello!*'s JD09 UK newstrade circulation dropped by (**8.4%**) YoY to **230,618** again indicating that consumers are opting for the less expensive celebrity options when choosing their magazines - although sales were up PoP by **4.4%**.

Women's Traditional Weeklies

The **Women's Traditional Weeklies** sector sold a total of **226.9m** UK newstrade copies in 2009, down **(7.9%)** YoY. It generated an overall RSV of **£177.6m**, which is a decrease of **(7.0%)** YoY.

The sector, split into **Real Life**, **Lifestyle** and **Mature** sub-sectors, encompasses **15** titles. The **Lifestyle** sub-sector has seen the lowest YoY volume decline, at **(3.4%)**, influenced by the positive performances of *Bella* and *Best*.

The majority of **Women's Traditional Weeklies** readers, **60.0%**, are classified in social grade **C2DE**. They are also older than the readers of **Celebrity Weekly** titles, with an average age of **47**, compared to **35** for the latter.

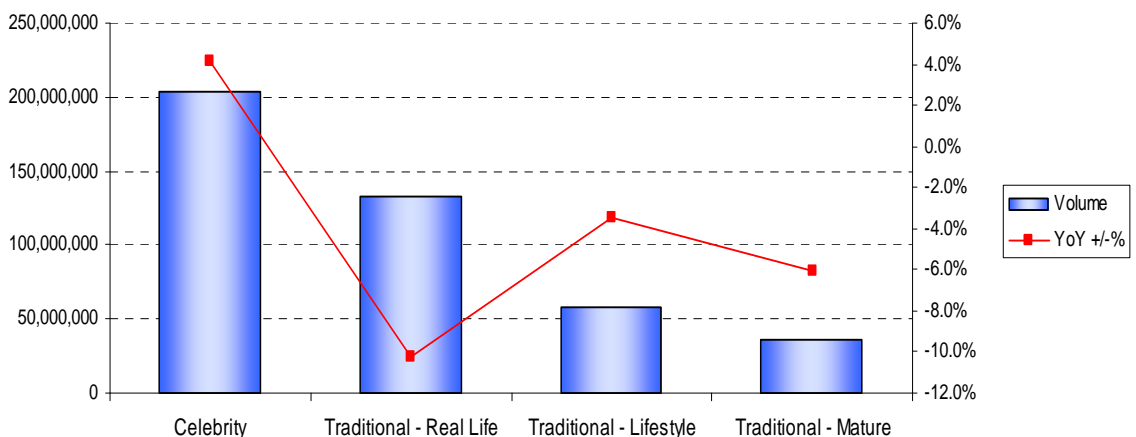
Readers of **Women's Traditional Weeklies** are more loyal to their usual title, with fewer last minute decisions on the newsstand. The low cover prices, at an average of **84p** at the end of JD09, cater for the more price sensitive consumer, and make the magazine a perfect affordable treat during a time when cutting back is commonplace.

2009 Annualised Performance

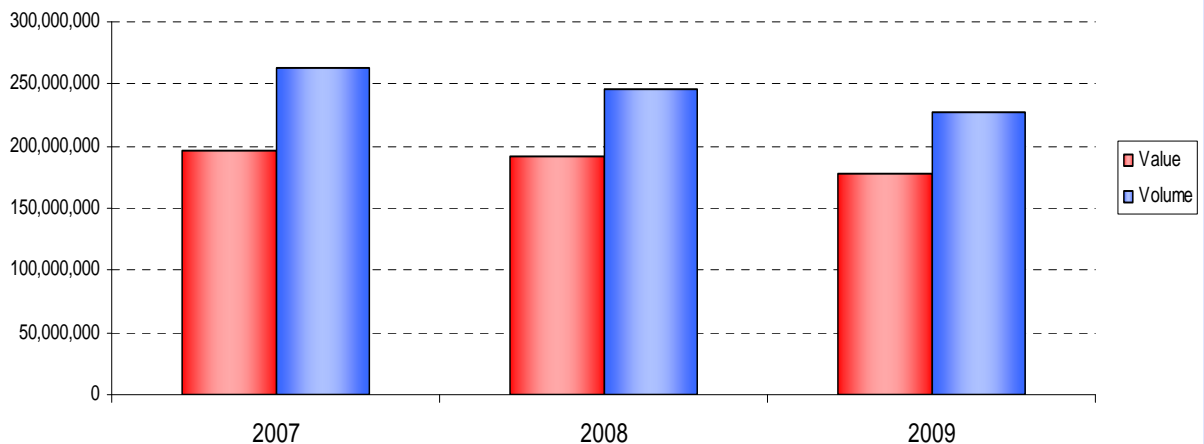
Number of Titles in 2009:	15
ABC Sector RSV Rank:	2
2009 Annual RSV:	£177.6m
2009 Annual RSV YoY:	(7.0%)

Please note the above figures relate to UK newstrade performance for the whole of 2009

2009 Women's Weeklies Sub-Sector Performance
Annualised UK Newstrade Volume



Traditional Sub-Sectors Performance - Last 3 Years
Annualised UK Newstrade Value & Volume



Key Title	Jul-Dec 2008		Jan-Jun 2009		Jul-Dec 2009		PoP Change	YoY Change
	UK News	Total ABC	UK News	Total ABC	UK News	Total ABC	UK News	UK News
Take a Break	932,651	943,229	914,109	920,060	891,794	900,016	-2.4%	-4.4%
Chat	453,636	469,407	421,814	434,929	424,787	440,093	0.7%	-6.4%
That's Life	419,129	424,064	384,659	386,875	375,523	378,551	-2.4%	-10.4%
Pick Me Up	359,452	374,268	311,572	323,171	314,908	329,943	1.1%	-12.4%
Woman	336,665	347,585	323,376	331,065	306,672	316,216	-5.2%	-8.9%
Woman's Weekly	303,211	340,635	296,395	335,118	304,314	344,553	2.7%	0.4%
Best	287,839	295,970	290,948	296,971	294,034	301,440	1.1%	2.2%
Woman's Own	315,411	325,330	300,544	307,407	288,967	298,472	-3.9%	-8.4%
Love It!	327,968	339,427	305,784	308,304	275,777	283,379	-9.8%	-15.9%
Peoples Friend	289,377	326,790	274,969	313,711	270,230	306,591	-1.7%	-6.6%
Bella	221,351	224,013	242,060	243,991	250,233	253,001	3.4%	13.0%
Real People	208,408	217,241	194,406	201,960	208,925	216,038	7.5%	0.2%
Full House	124,230	125,483	134,592	135,592	178,869	180,070	32.9%	44.0%
My Weekly	145,516	152,675	138,525	145,676	138,710	145,750	0.1%	-4.7%
The Lady	18,645	26,322	20,219	28,721	19,061	28,782	-5.7%	2.2%

Title Performance

- The top three performers of the period are the established **Real Life** titles *Take a Break*, *Chat* and *That's life*. These are aimed at a slightly older reader than the newer **Real Life** titles such as *Pick Me Up* and *Love It!*.
- *Take a Break* has once again held onto the top position, despite a YoY decline of **(4.4%)** bringing its **JD09** UK newstrade figure to **891,794**. This title has the oldest readership of all the **Real Life** titles, with an average age of **45**.
- *Pick Me Up*, which posted an average UK newstrade sale of **314,908**, has taken back its position as the fourth highest selling traditional title after a PoP increase of **1.1%**.
- Outside of the **Real Life** sub-sector, **Lifestyle** title *Woman* has achieved the highest UK newstrade sale of **306,672**. The title has the largest **ABC1** readership of the **Women's Traditional Weeklies**, at **47.4%**.
- *Woman's Weekly* has experienced growth of **2.7%** PoP and **0.4%** YoY to record a UK newstrade ABC of **304,314**, and retains its position as the best selling title within the **Mature** sub-sector.
- Other notable good performances came from *Best*, *Bella*, *Real People* and England's longest established women's weekly, *The Lady*, which all showed YoY increases on JD08.
- The best overall performance came from *Full House*, which was up by **32.9%** PoP and **44.0%** YoY, although a permanent cover price reduction in April from **68p** to **50p** has caused a fall in annualised RSV of **(11.2%)** YoY.
- *Love It!* has experienced the most severe decline of the sector with sales having fallen by **(15.9%)** and **(9.8%)** YoY and PoP respectively. This was in spite of significant discounting during the period which saw **20%** of its newstrade sales sold below basic cover price. This title attracts the youngest readers of the sector, with an average age of only **30**.

TV Weeklies

The **TV Weeklies** sector consists of eight titles, split into the smaller groupings of **Premium**, **Value** and **Mid-Market**.

A total of **218.0m** UK newstrade copies of **TV Weeklies** titles were sold in 2009, a decline of **(6.9%)** YoY. Of the three sub-sectors, the **Value** market fared best, declining **(5.6%)** YoY.

The sector's overall UK newstrade RSV is down **(4.1%)** YoY, but with **£145.1m** generated during 2009 it remains the third most important sector overall.

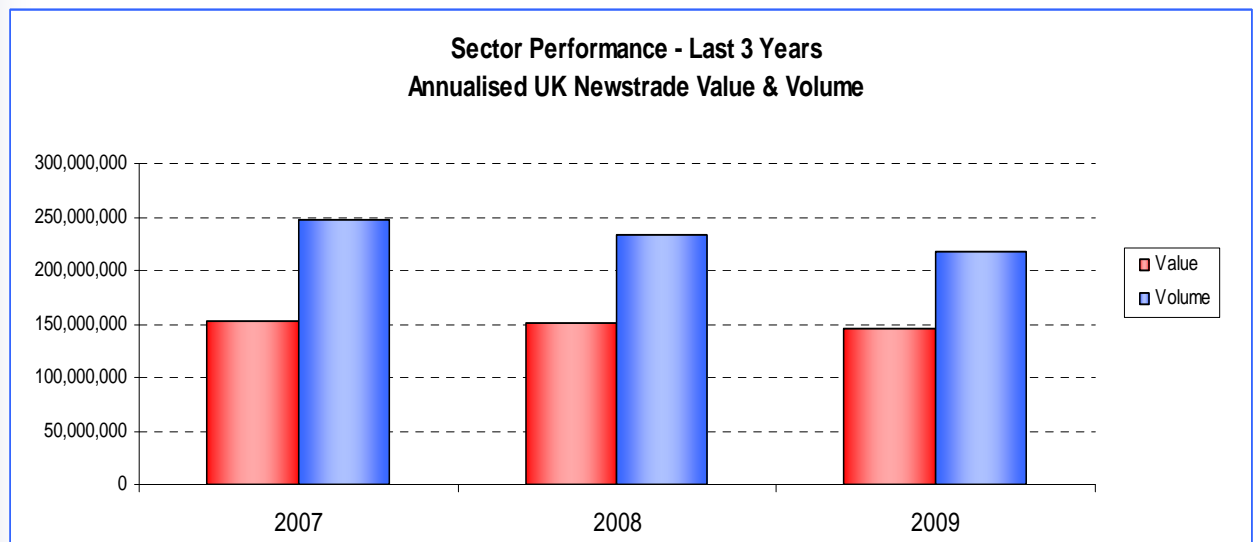
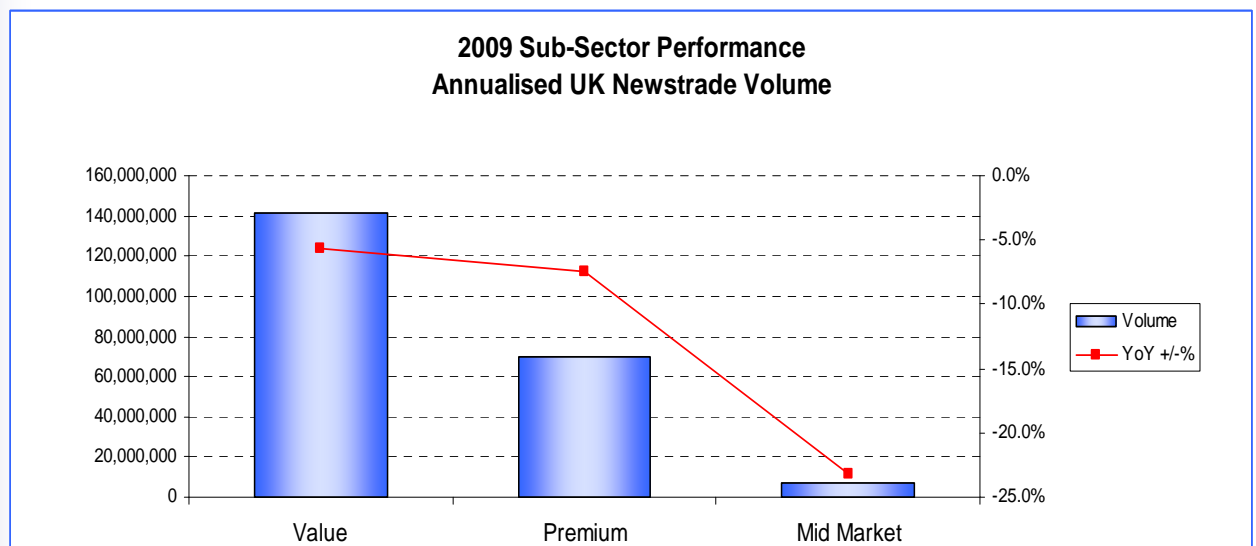
2009 Annualised Performance

Number of Titles in 2009:	8
ABC Sector RSV Rank:	3
2009 Annual RSV:	145.1m
2009 Annual RSV YoY:	(4.1%)

Please note the above figures relate to UK newstrade performance for the whole of 2009

Whilst many activities suffer during a recession, TV viewing has continued to prosper, with reduced budgets allowing less money to be spent on going out. In addition, the number of ways of watching programmes is increasing, with the growth in on-demand services and an increase in personal digital recording equipment.

The success of **TV Weeklies** is dependent on their offer of something over and above the listings available in newspapers or via electronic programme guides (EPGs). Interviews, reviews and soap secrets continue to draw in their readers. The consumers are predominantly women, and, with the exception of *Radio Times* and *TV & Satellite Week*, they are mainly C2DE.



Title	Jul-Dec 2008		Jan-Jun 2009		Jul-Dec 2009		PoP Change	YoY Change
	UK News	Total ABC	UK News	Total ABC	UK News	Total ABC	UK News	UK News
TV Choice	1,369,088	1,369,088	1,335,894	1,335,894	1,302,382	1,302,382	-2.5%	-4.9%
What's on TV	1,315,543	1,318,093	1,270,032	1,272,586	1,243,574	1,245,933	-2.1%	-5.5%
Radio Times	877,005	1,023,255	794,458	966,098	818,800	1,000,648	3.1%	-6.6%
TV Times	333,617	343,226	300,375	311,307	309,159	321,005	2.9%	-7.3%
TV Easy	212,419	212,419	201,724	201,728	180,793	180,798	-10.4%	-14.9%
TV & Satellite Week	159,875	183,906	157,914	183,929	158,270	185,813	0.2%	-1.0%
TV Quick	162,661	167,507	144,270	144,270	122,847	122,847	-14.8%	-24.5%
Total TV Guide	107,176	111,221	103,171	107,681	105,777	110,748	2.5%	-1.3%

Title Performance

- *TV Choice* remains the biggest seller of the sector, and of the UK magazine market, with an average UK newstrade sale of **1,302,382** copies. This was a decline of **(4.9%)** YoY.
- Second placed title *What's On TV's* higher cover price means it generated over **£2m** more RSV than *TV Choice* during JD09. The title posted a UK newstrade ABC of **1,243,574** copies, down just **(5.5%)** YoY despite a 2p cover price increase in 2009.
- *Radio Times* has recorded a PoP increase and a UK newstrade sale of **818,800** to retain its position at the top of the **Premium** sector in spite of a decline of **(6.6%)** YoY.
- *TV Times* and *TV & Satellite Week* both achieve PoP growth. The latter title also records the most stable YoY performance in the sector, with a UK newstrade ABC of **158,270** down just **(1.0%)** YoY.
- *TV Quick* has seen the worst YoY performance, down **(24.5%)**. As the only **Mid-Market** title, it has perhaps suffered from a lack of clear direction and audience.

Women's Fashion/Lifestyle

The large **Women's Fashion / Lifestyle** sector is comprised of five sub-sectors: **Middle Youth, Young Women, Lifestyle, Lifestyle - Other** and **Fashion Specialist**.

Overall the sector generated **£105.2m** in 2009, representing a decline of **(5.1%)** YoY. This equated to **38.2 million** copy sales, a decline of **(8.3%)** on 2008. Of the five sub-sectors, **Lifestyle** performs best, achieving YoY parity in volume.

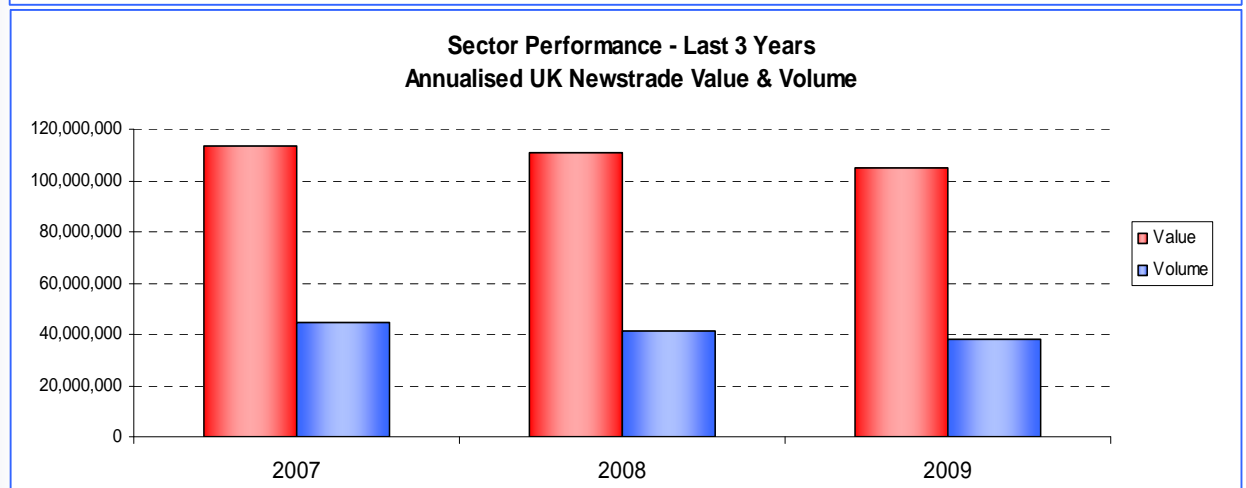
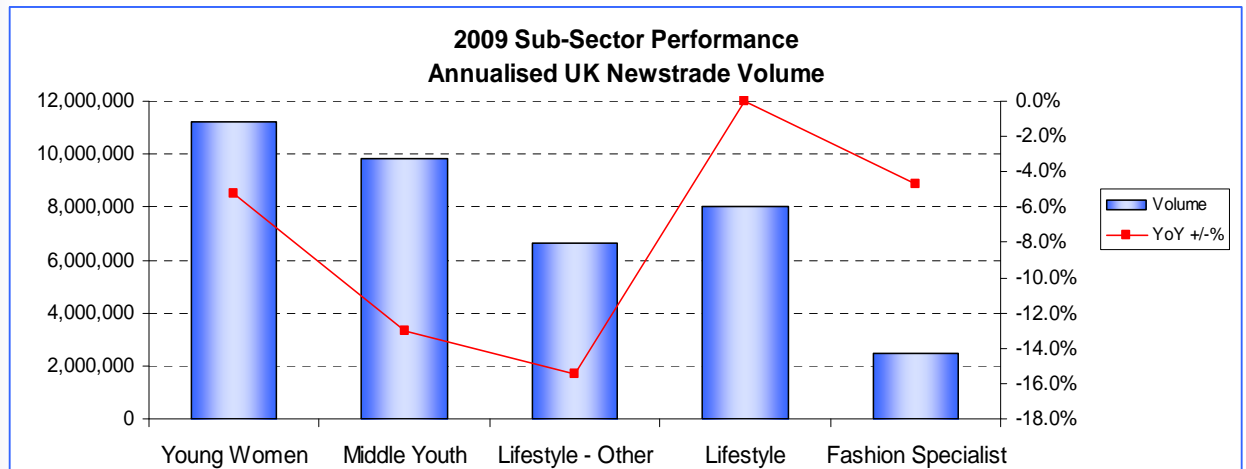
A number of the **Women's Fashion / Lifestyle** titles continue to display a strong performance despite the current conditions of the economic climate. Mintel reports that the worth of the women's outerwear market has declined by only **2%** from 2008 to 2009, with a **1%** increase expected to occur in the market in 2010. This increase is said to be partly due to increasing numbers of affluent women and there is an opportunity for women's fashion and lifestyle magazines to capitalise on this in 2010.

Mintel also reports that over 8 million women (with the majority being aged over 40) state that they do not need an excuse to shop and therefore shop on impulse. This indicates that there is still plenty of interest in the fashion industry to spill over into the magazine category, especially in the fashion / lifestyle titles aimed at women over 40. With the rise of digital media, the number of magazine subscriptions made online could also see an increase in the forthcoming months.

2009 Annualised Performance

Number of Titles in 2009:	20
ABC Sector RSV Rank:	4
2009 Annual RSV:	£105.2m
2009 Annual RSV YoY:	(5.1%)

Please note the above figures relate to UK newstrade performance for the whole of 2009



Key Title	Jul-Dec 2008		Jan-Jun 2009		Jul-Dec 2009		PoP Change	YoY Change
	UK News	Total ABC	UK News	Total ABC	UK News	Total ABC	UK News	UK News
Glamour	430,052	547,607	406,879	526,145	401,013	515,281	-1.4%	-6.8%
Cosmopolitan	329,457	450,836	321,475	441,663	309,905	430,353	-3.6%	-5.9%
Woman & Home	228,932	353,160	216,639	350,212	232,770	368,388	7.4%	1.7%
Company	219,542	240,334	212,459	230,214	221,504	240,035	4.3%	0.9%
Yours	263,592	307,064	245,830	301,089	219,313	284,560	-10.8%	-16.8%
Good Housekeeping	189,110	425,407	182,533	410,011	202,473	430,089	10.9%	7.1%
Marie Claire	226,665	314,259	186,852	285,307	184,849	283,025	-1.1%	-18.4%
Prima	168,962	284,093	157,214	274,063	166,785	288,301	6.1%	-1.3%
Red	157,855	225,380	143,753	218,726	152,381	226,502	6.0%	-3.5%
BM (formerly Bon Marche)	133,254	133,254	-	-	132,421	132,421	-	-0.6%
Elle (U.K.)	128,473	195,114	128,262	195,192	126,221	195,455	-1.6%	-1.8%
Vogue	114,090	220,386	105,005	210,435	111,080	210,526	5.8%	-2.6%
Instyle UK	116,920	180,987	115,536	182,989	109,604	184,141	-5.1%	-6.3%
Essentials	84,540	98,487	83,802	102,260	90,078	112,135	7.5%	6.6%
Easy Living	103,015	185,115	97,515	180,034	89,419	170,033	-8.3%	-13.2%
She	97,782	165,008	79,794	148,860	81,139	150,074	1.7%	-17.0%
Psychologies Magazine	78,643	140,438	71,925	130,608	72,855	130,860	1.3%	-7.4%
Harpers Bazaar	34,886	109,468	33,690	109,646	36,958	110,638	9.7%	5.9%
Tatler	31,172	86,107	31,283	85,064	33,490	86,345	7.1%	7.4%
Vanity Fair	32,482	101,169	28,017	101,698	32,807	102,421	17.1%	1.0%

Title Performance

- *Woman & Home* continues to demonstrate a strong performance with a UK newstrade ABC of **232,770**, up **1.7%** YoY and **7.4%** PoP in UK newstrade volume. This success can be partly attributed to the variety of celebrities which grace the covers of the title, such as Michelle Obama on the October 09 issue and Delia Smith on the popular December 09 issue. Close competitor *Good Housekeeping*, up **7.1%** YoY, launched a travel edition with the July 09 issue. The title is one of the last in the sector to publish an edition in a smaller format.
- Glamour retains its position as the leading title in the sector, down **(6.8%)** YoY. Its stable performance can be partly attributed to successful covermount promotions such as the Nails Inc nail varnish promotion repeated on the December issue for the second year in a row.
- Having re-launched on the September 09 issue, *Marie Claire* posts a UK newstrade ABC of **184,849**, down only **(1.1%)** PoP. This is a great result for *Marie Claire* and follows five months of research and development to revitalise the brand.
- *Red* has published its highest ever Total ABC of **226,502**. The title has also seen an increase in UK newsstand sales, up **6.0%** PoP.
- *Elle* has outperformed the overall sector, down just **(1.8%)** YoY with a UK newstrade ABC of **126,221**. The title, in its 25th year, has attracted popular cover stars such as Lily Allen and Cheryl Cole in the JD09 period. The title's Total ABC increased slightly YoY, with a rise of **0.2%**.
- *In Style* has an average UK newstrade circulation of **109,604**, down **(5.1%)** PoP and **(6.3%)** YoY. The title's Total ABC, however, was the best performing of all the fashion titles, up **1.7%** YoY thanks to significant increases in Export and Subscriptions sales.
- *Essentials* has seen strong growth in the period, up **6.6%** YoY and **7.5%** PoP in UK newstrade volume. In contrast rival *Prima* is down **(1.3%)** YoY. This newstrade increase in addition to a huge surge in subscription sales saw *Essentials* top the sector for Total ABC growth, up **13.9%** YoY.
- *Psychologies* and *She* magazines delivered PoP growth, up **1.3%** and **1.7%** respectively following a strong second half of the year.
- Three of the four specialist fashion titles - *Harper Bazaar*, *Tatler* and *Vanity Fair* - have shown solid YoY growth in 2009.

Children's Magazines

The **Children's Magazines** sector consists of the following five sub-sectors: **Pre-School**, **Pre-Teen General**, **Primary - Boys**, **Primary - General** and **Primary - Girls**, with **Pre-School** the largest of the five.

2009 UK newstrade volume and RSV in this sector fell by **(16.5%)** and **(11.2%)** YoY respectively. However this is compared to a year of significant growth in 2008, thanks to highly successful launches such as *Disney High School Musical*. In reality 2009's RSV is only slightly lower than 2007's total of **£90.1m** and the sector is in excellent health.

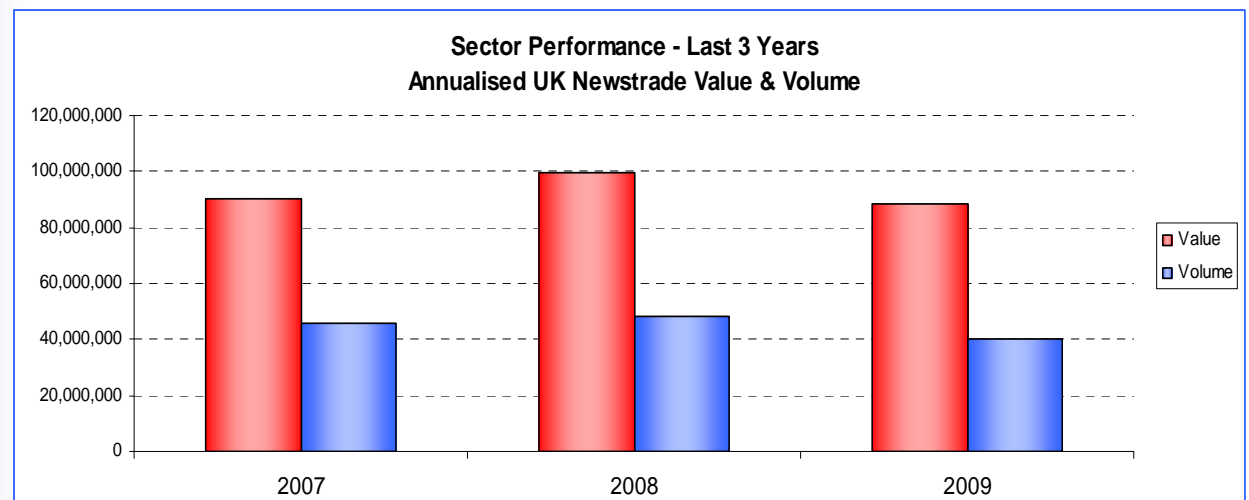
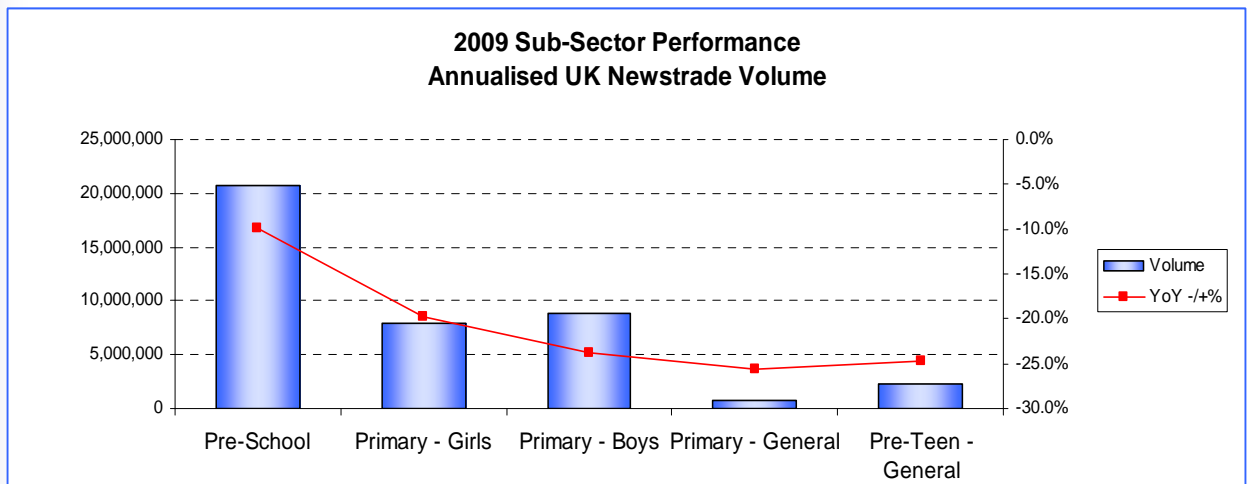
2009 Annualised Performance

Number of Titles in 2009:	48
ABC Sector RSV Rank:	5
2009 Annual RSV:	£88.6m
2009 Annual RSV YoY:	(11.2%)

Please note the above figures relate to UK newstrade performance for the whole of 2009

The **Children's Magazines** sector is highly fluid and, with children's titles accounting for three of the four biggest launches in the magazine market, this period has been no exception. Character-based titles continue to dominate, often using recognised favourites from television series or films. However, the advantages of an existing fan base created from other media can be offset by the constant introduction of new series and characters, making longevity a more challenging goal in this sector.

The sector is also unique in its need to appeal to two generations – both enthusiasm from the child and approval from the parent is required for success. Titles such as *Fun to Learn – Peppa Pig* answer this brief perfectly, combining interesting characters with an educational element.



Title	Jul-Dec 2008		Jan-Jun 2009		Jul-Dec 2009		PoP Change	YoY Change
	UK News	Total ABC	UK News	Total ABC	UK News	Total ABC	UK News	UK News
The Simpsons Comics	109,251	112,393	102,584	106,545	97,892	101,466	-4.6%	-10.4%
Fun to Learn - Peppa Pig	62,269	64,425	82,310	83,896	79,563	82,498	-3.3%	27.8%
Fun to Learn - Friends	78,624	79,400	80,701	81,287	76,017	76,846	-5.8%	-3.3%
Simpsons Comics Presents	71,036	71,582	73,133	73,549	67,968	68,344	-7.1%	-4.3%
In The Night Garden	77,358	77,358	80,334	80,334	67,454	67,454	-16.0%	-12.8%
Girl Talk	71,957	73,967	59,136	60,443	66,477	68,026	12.4%	-7.6%
Sparkle World	58,538	59,367	61,590	63,863	66,068	70,265	7.3%	12.9%
Ben 10	-	-	70,012	70,012	64,000	64,000	-8.6%	-
Disney's Princess	64,710	64,843	62,314	62,541	63,708	63,919	2.2%	-1.5%
Disney High School Musical	146,965	148,514	109,523	110,746	62,878	63,868	-42.6%	-57.2%
Barbie	48,079	48,292	51,143	51,504	57,783	58,035	13.0%	20.2%
CBeebies Weekly	50,693	53,740	44,706	48,509	52,476	54,158	17.4%	3.5%
Cbeebies Art	53,957	53,957	41,970	41,970	52,361	52,361	24.8%	-3.0%
Hannah Montana Magazine	62,574	62,615	61,412	61,581	52,214	52,404	-15.0%	-16.6%
Bob The Builder	40,639	40,639	48,224	48,224	49,183	49,183	2.0%	21.0%
Charlie & Lola	46,664	46,664	47,066	47,066	46,940	46,940	-0.3%	0.6%
Toxic	47,510	47,510	49,005	49,005	46,544	46,544	-5.0%	-2.0%
Disney and Me	56,174	56,313	49,804	50,050	46,325	46,500	-7.0%	-17.5%
The Beano	56,932	61,890	47,890	53,964	46,021	52,000	-3.9%	-19.2%
Dora The Explorer	51,038	51,038	49,520	49,520	45,583	45,583	-8.0%	-10.7%
Go Girl	63,325	63,325	47,997	48,004	44,991	45,005	-6.3%	-29.0%
Fun to Learn - Favourites	48,138	48,687	47,712	48,314	44,711	45,542	-6.3%	-7.1%
Toybox	48,429	48,429	41,582	41,582	39,333	39,333	-5.4%	-18.8%
Waybuloo	-	-	-	-	38,908	38,908	-	-
Playhouse Disney	-	-	-	-	37,016	37,016	-	-
Power Rangers	44,310	44,310	52,004	52,004	36,550	36,550	-29.7%	-17.5%
Doctor Who Adventures Magazine	73,396	82,205	46,592	56,986	36,425	44,664	-21.8%	-50.4%
Spongebob Squarepants	34,183	34,800	33,467	34,163	36,387	37,091	8.7%	6.4%
Play and Learn - Thomas and Friends	37,518	37,518	38,031	38,033	36,027	36,030	-5.3%	-4.0%
Goodie Bag Mag	28,076	32,018	29,011	34,885	35,098	41,832	21.0%	25.0%
Thomas and Friends	39,012	39,012	37,454	37,458	35,054	35,061	-6.4%	-10.1%
World of Cars	47,413	47,413	40,004	40,004	34,008	34,008	-15.0%	-28.3%
All About Animals	42,118	42,118	35,469	35,469	32,896	32,896	-7.3%	-21.9%
Spectacular Spiderman	39,997	40,122	33,200	33,351	32,865	33,007	-1.0%	-17.8%
WWE Kids	-	-	-	-	32,726	33,447	-	-
Cbeebies Animals	41,464	41,464	37,696	37,696	31,512	31,512	-16.4%	-24.0%
Numberjacks	55,023	55,023	43,081	43,081	31,090	31,090	-27.8%	-43.5%
Disney Fairies Tinkerbell	29,086	29,086	32,067	32,067	30,527	30,527	-4.8%	5.0%
Fireman Sam	31,172	31,172	29,532	29,532	27,157	27,157	-8.0%	-12.9%
The BeanoMAX	39,433	41,476	40,912	42,565	25,730	27,602	-37.1%	-34.8%
All About	41,045	41,045	23,351	23,351	24,603	24,603	5.4%	-40.1%
Animals and You	24,442	28,546	20,076	23,045	22,624	26,795	12.7%	-7.4%
The Dandy	25,397	26,694	19,206	20,403	17,745	18,938	-7.6%	-30.1%
First News	13,983	37,038	-	-	13,750	39,450	-	-1.7%
Bratz	45,956	46,385	34,335	34,642	-	-	-	-
Scooby Doo	40,442	40,695	-	-	-	-	-	-
Girl Talk Extra	34,445	34,445	21,232	21,232	-	-	-	-
Lazy Town	30,781	31,131	31,332	31,601	-	-	-	-
Teletubbies	29,571	29,571	24,009	24,009	-	-	-	-
Amy Magazine	24,049	24,049	-	-	-	-	-	-
Transformers Comic	23,734	24,617	-	-	-	-	-	-
Balamory	22,815	22,815	-	-	-	-	-	-
Noddy Magazine	18,313	18,385	-	-	-	-	-	-

Title Performance

- *The Simpsons Comics* has achieved the highest UK newstrade sales, selling **97,892** copies an issue despite a YoY decline of **(10.4%)**.
- *Disney High School Musical* has slipped from the top spot this period, as 2009 was the first year since the title's launch that has not seen a movie release from this hugely popular franchise. However, with *Disney High School Musical 4* out this year, interest will be reignited among Pre-Teens.
- The sector, notable for its regular launches, has seen the introduction of *Waybuloo*, *Playhouse Disney* and *WWE Kids* this period.

Motoring, Leisure and Sports

The **Motoring & Motorcycling** sector consisted of **49** titles in 2009, split across **10** different sub-sectors. The **Buying & Selling** sub-sector is the largest of these and includes **14** regional editions of *Auto Trader*. The title's cumulative UK newstrade ABC of **147,459** was the highest in the sector but also a significant decline of **(21.7%)** YoY.

BBC's *Top Gear Magazine* was the largest single edition title in the sector with a UK newstrade ABC of **113,636**. This was only down **(3.1%)** YoY as the title remained buoyant off the back of the enduringly popular TV programme.

Seven titles recorded YoY increases in their UK newstrade ABC and of these five covered classic vehicles: Motorcycling's *Classic Bike* and *Octane*, and Motoring's *Classic & Sports Car*, *Classic Cars* and *Classic & Vintage Commercials*, suggesting nostalgia is thriving amongst motoring enthusiasts.

2009 Annualised Performance

Number of Motoring titles in 2009:	49
ABC Sector RSV Rank:	6
2009 Annual RSV:	£82.2m
2009 Annual RSV YoY:	(18.7%)

Top Five Sub-Sectors in 2009:

Buying & Selling, Motoring – General, Motorcycling – General, Motoring - Classics and Motoring - Sporting

2009 Annualised Performance

Number of Leisure titles in 2009:	64
ABC Sector RSV Rank:	7
2009 Annual RSV:	£65.0m
2009 Annual RSV YoY:	(7.2%)

Top Five Sub-Sectors in 2009:

Entertainment / Listings, Film, Photography, Equestrian and Aviation

Leisure Interests is hugely diverse sector consisting of **64** titles in 2009, split across **21** different sub-sectors. UK newstrade volumes declined **(9.1%)** YoY in 2009 in line with the total magazine market.

The first and third highest selling JD09 titles are **Film** magazines *Empire* and *Total Film*, posting UK newstrade ABCs of **124,904** and **59,058** respectively, down **(2.2%)** and **(7.6%)** YoY. The main edition of the Big Issue separates them in 2nd place, reporting a JD09 distribution of **72,979**.

Seven titles in the sector posted YoY growth in JD09, of which the largest was **Camping/Walking/Climbing** title *The Great Outdoors*. The title's YoY increase of **11.1%** to **6,211** UK newstrade copies is perhaps indicative of a year of recession in which more people sought cheaper forms of leisure and entertainment. In the **Collecting** sub-sector, *Tractor & Machinery* posted strong YoY growth of **7.5%** to record a UK newstrade ABC of **35,324** copies, the 4th highest in the sector overall.

The **Sports** sector consists of **13** different sub-sectors and **33** different titles in 2009. Annualised UK newstrade volumes totalled **19.3m** copies in 2009, a fall of **(14.2%)** YoY, while RSV fell by **(12.6%)** YoY to **£50.1m**.

The **Football** sub-sector dominates the sector. Although volumes fell by **(23.1%)** YoY in a year without a major tournament, football titles still accounted for **41.3%** and **37.0%** of the **Sports** sector's 2009 volume and RSV. *FourFourTwo*, *Match*, *Match of the Day* and *Kick!* magazines top the sector's ABCs.

The fifth highest selling title behind the football titles is **Angling** title *Angling Times*. It and fellow weekly *Angler's Mail* both fared well in 2009 posting small YoY UK newstrade declines of just **(1.9%)** and **(1.6%)** respectively. Traditional cycling titles had an even better year, with *Cycling Weekly* up **9.6%** YoY to a UK newstrade figure of **19,591**. In the **Golf** sector *Golf Monthly* posted a positive PoP increase of **1.3%** and a UK newstrade figure of **33,213**. The title has nearly halved the circulation gap between itself and sector leader *Today's Golfer* over the course of 2009.

2009 Annualised Performance

Number of Sports titles in 2009:	33
ABC Sector RSV Rank:	9
2009 Annual RSV:	£50.1m
2009 Annual RSV YoY:	(12.6%)

Top Five Sub-Sectors in 2009:

Football, Angling, Cycle Sports, Golf and Shooting

Women's Home Interest

The **Women's Home Interest** sector can be divided into three distinct sub-sectors: **Mainstream**, **Traditional** and **Modern**.

10.3m copies of **Women's Home Interest** magazines were sold in 2009, representing a decline of **(17.7%)** YoY. The double-digit decline is exacerbated by two of the larger volume titles, *Real Homes* and *Good Homes*, not releasing JD09 ABCs at the same time as the rest of the market. Stripping out these titles the sector volumes are down **(9.5%)** YoY.

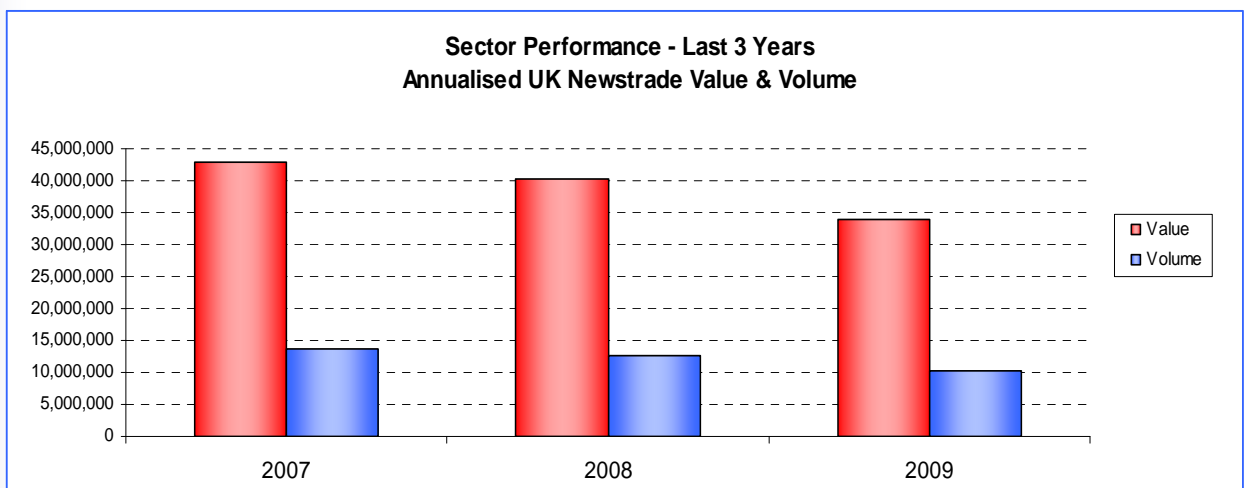
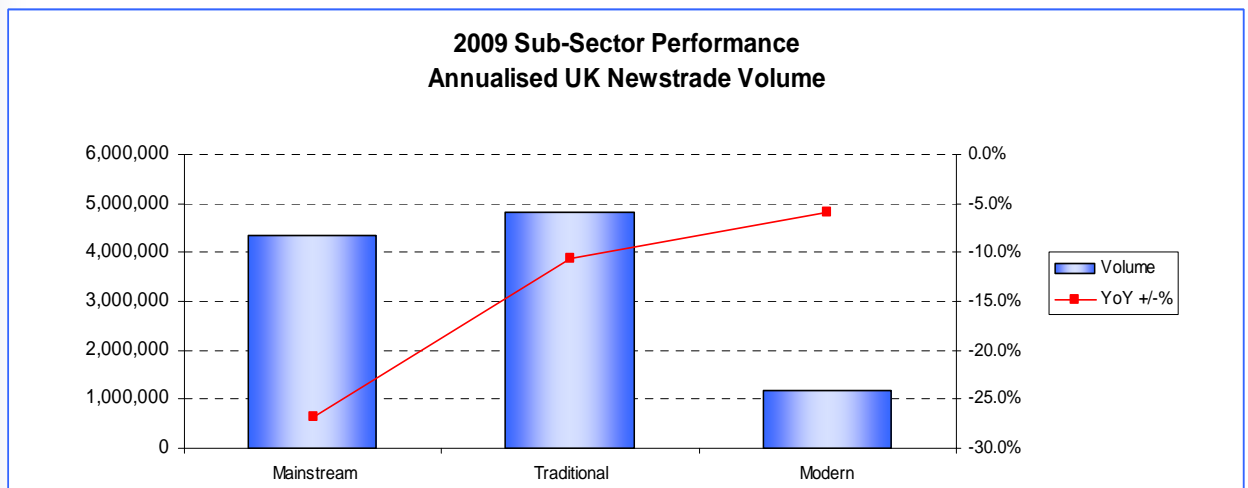
2009 Annualised Performance

Number of Titles in 2009:	19
ABC Sector RSV Rank:	10
2009 Annual RSV:	£34.0m
2009 Annual RSV YoY:	(15.9%)

Please note the above figures relate to UK newstrade performance for the whole of 2009

With the recent drop in levels of property development due to the difficulty of making a quick and easy profit, conditions in the home interest market became tougher in 2009. However Mintel reports that home and gardening remain a focus of interest for British consumers, providing a base for the **Women's Home Interest** sector.

The desire to present a pleasant and engaging looking home to visiting guests is also still alive and kicking, with Mintel reporting that four in ten adults think the appearance of their home is still very important. These combined factors should help to sustain future sales of **Women's Home Interest** titles. In the current economic climate, houseware buyers are also becoming increasingly price conscious, with more people taking time to shop around for the lowest prices. This creates an opportunity for magazines to capitalise on this interest with appropriate content and features.



Key Title	Jul-Dec 2008		Jan-Jun 2009		Jul-Dec 2009		PoP Change	YoY Change
	UK News	Total ABC	UK News	Total ABC	UK News	Total ABC	UK News	UK News
Ideal Home	146,497	197,516	139,008	194,633	137,695	187,322	-0.9%	-6.0%
Your Home	97,807	107,723	104,564	114,542	119,122	130,295	13.9%	21.8%
Ideal Homes Complete Guide to Xmas	104,002	106,890	-	-	110,948	113,136	-	6.7%
House Beautiful	94,978	161,102	83,084	150,076	103,221	168,035	24.2%	8.7%
Country Living	82,900	189,200	85,881	192,475	92,513	197,891	7.7%	11.6%
25 Beautiful Homes	72,371	102,487	75,711	102,868	73,722	104,114	-2.6%	1.9%
Homes & Gardens	66,992	140,264	64,065	135,004	61,670	132,117	-3.7%	-7.9%
Country Homes and Interiors	52,119	88,518	48,930	84,453	53,525	87,326	9.4%	2.7%
Living etc	47,997	86,489	51,488	90,877	51,512	91,543	0.0%	7.3%
House & Garden	41,347	140,004	41,364	130,692	40,079	130,777	-3.1%	-3.1%
Elle Decoration	27,328	62,027	27,045	58,020	29,332	60,056	8.5%	7.3%
BBC Homes & Antiques	25,758	75,347	22,189	54,083	26,622	60,222	20.0%	3.4%
Period Living	29,824	48,576	-	-	26,549	45,223	-	-11.0%
Coast	24,138	42,259	22,449	41,724	21,181	41,778	-5.6%	-12.3%
Grand Designs	16,314	25,068	19,049	26,603	17,895	27,571	-6.1%	9.7%
The English Home - Group	14,554	68,525	-	-	15,507	61,355	-	6.5%
Homes & Interiors Scotland	7,861	10,553	6,947	9,802	8,018	10,953	15.4%	2.0%
Real Homes	61,155	68,005	-	-	-	-	-	-
House and Home	16,895	20,939	-	-	-	-	-	-
Image Interiors	10,113	15,073	-	-	-	-	-	-
Ireland's Homes Interiors and Living Magazine	17,126	17,438	14,325	14,624	-	-	-	-
Northern Ireland Homes & Lifestyle	5,943	6,029	-	-	-	-	-	-
Good Homes	61,559	97,725	56,806	90,429	-	-	-	-

Title Performance

- *Ideal Home* remains the biggest volume seller on the newsstand posting a decline of **(0.9%)** on the previous period and a **(6.0%)** decline YoY.
- Volume in the **Traditional** sub-sector, the largest of the three sub-sectors in 2009, fell by **(10.5%)** YoY. Defying the trend, IPC's *Country Homes & Interiors* and NatMags' *Country Living* both posted YoY increases for the last six months. In 2009 the titles saw overall newstrade volumes rise on 2008 by **0.2%** and **2.1%** respectively. *BBC Homes & Antiques* showed some recovery in the latter half of the year, up **20.0%** on the JJ09 period as the 32nd series of the Antiques Roadshow aired on TV.
- A sharp decline in the **Mainstream** sector, down **(26.7%)** YoY, is largely attributed to *Good Homes* and *Real Homes* not releasing ABCs with the rest of the market. Mainstream titles *Your Home* and *House Beautiful* show double-digit PoP growth, up **13.9%** and **24.2%** respectively.
- The **Modern** sub-sector sold **1.2m** copies in 2009, a **(5.9%)** YoY decline. The sub-sector outperformed the other two sub-sectors with its three titles *Elle Decoration*, *Living Etc.* and *Grand Designs* showing YoY growth in the current period. Nectar analysis demonstrates that consumers of these **Modern** titles are younger than consumers of **Mainstream** and **Traditional** titles. This should help sustain future sales, with Mintel reporting that there will be increased interest in the homes market from young couples and singles under 35 years over the coming years.
- 2009 has seen *Real Homes* magazine successfully repositioned as a specialist project magazine for home improvers. The content from former Centaur title '*Move or Improve*' magazine was merged into *Real Homes* from the 2009 March issue. Although the title suffered an estimated **(11.7%)** YoY decline of newstrade sales at full cover price, its JD09 ABC is expected to confirm an increase in subscriber numbers of **17.8%** YoY, in line with the publisher's expectations.
- *Good Homes* is expected to release a Total ABC of **75k** copies for the period July to December 2009. This will be Kelsey's first circulation release for *Good Homes* and covers the first six issues of the company's ownership of the magazine since its purchase from the BBC in July 2009.

Men's Lifestyle Monthlies

The **Men's Lifestyle Monthlies** sector sold **8.6m** UK newstrade copies in 2009, which represented a decline of **(9.5%)** YoY. The sector generated **£32.3m** in UK newstrade RSV for 2009, a drop of **(9.0%)** YoY.

Volume decline is at a slower rate than the previous year's fall of **(12.2%)**, although 2009 performance is helped by the launch of *Wired*, a specialist technology title, and *Front* releasing ABC figures this year for the first time since 2005.

2009 Annualised Performance

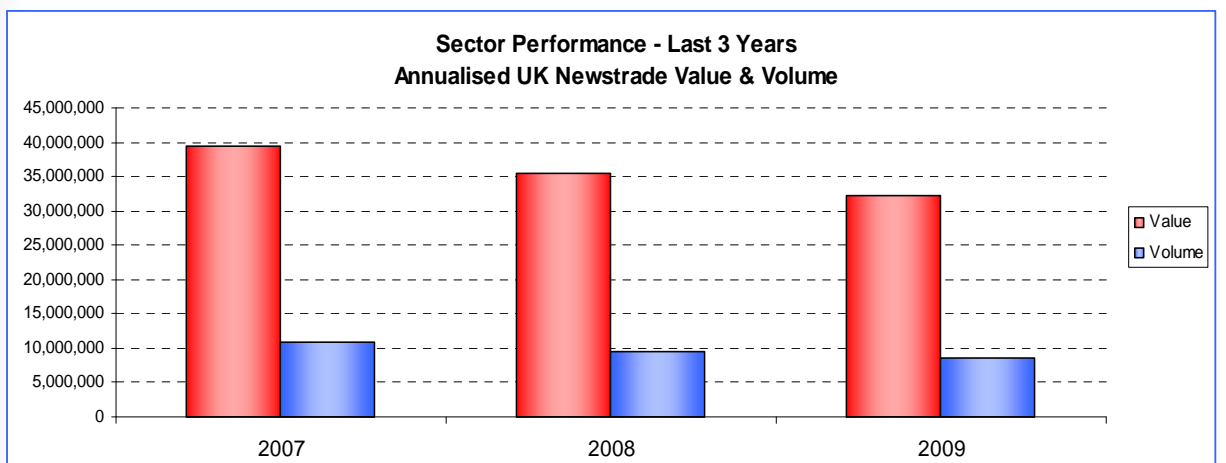
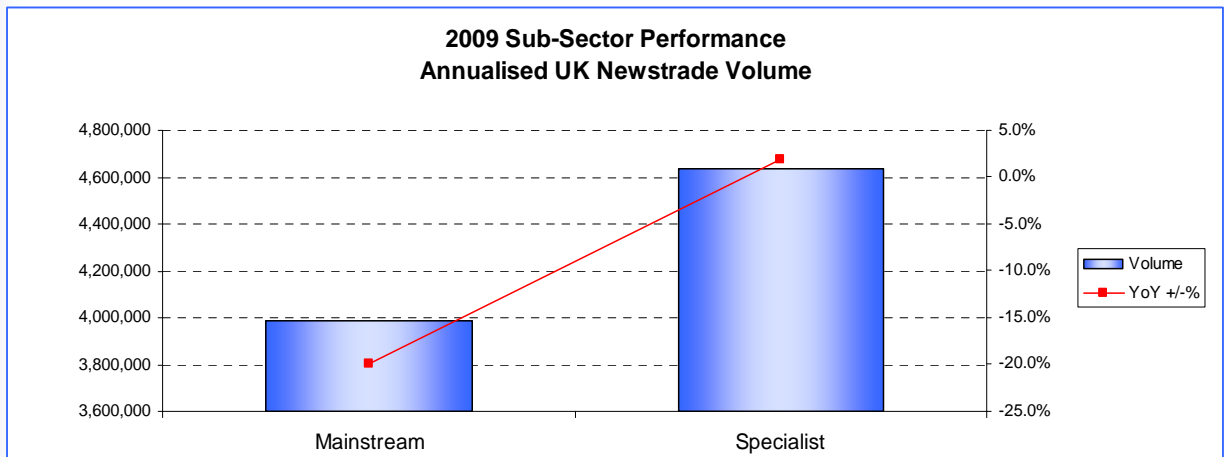
Number of Titles in 2009:	13
ABC Sector RSV Rank:	11
2009 Annual RSV:	£32.3m
2009 Annual RSV YoY:	(9.0%)

Please note the above figures relate to UK newstrade performance for the whole of 2009

Titles in the **Men's Lifestyle Monthlies** sector have been highlighted in some media reports for being too narrow in focus and for being rendered less relevant by the arrival of the men's weeklies, frees and specialist male newspaper supplements (Guardian.co.uk). This is certainly reflected in the YoY ABC figures, with the **Specialist** titles now out performing the **Mainstream** titles within the sector.

In order to remain competitive, several of the **Mainstream** titles have had editorial refreshes, most predominantly *FHM*, who has re-launched former stand-alone publications *FHM Bionic* and *FHM Collections* as supplements in the JD09 period.

Loaded has also had an editorial refresh as well as expanding its brand through other areas, such as through its partnership with PKR.com, which will see the creation of official branded poker rooms on the site, featuring the magazine's cover stars.



Key Title	Jul-Dec 2008		Jan-Jun 2009		Jul-Dec 2009		PoP Change	YoY Change
	UK News	Total ABC	UK News	Total ABC	UK News	Total ABC	UK News	UK News
FHM	189,091	272,545	157,497	235,027	152,027	231,235	-3.5%	-19.6%
Men's Health	148,913	250,094	145,815	250,247	147,836	250,577	1.4%	-0.7%
Stuff	68,136	95,072	58,919	84,565	69,538	95,695	18.0%	2.1%
GQ	72,469	130,094	61,597	120,019	66,309	120,057	7.6%	-8.5%
Loaded	71,594	90,071	56,700	72,679	58,619	71,251	3.4%	-18.1%
Men's Fitness	50,795	67,160	52,536	67,987	52,046	68,037	-0.9%	2.5%
Healthy for Men	62,687	62,687	66,753	66,753	51,377	51,377	-23.0%	-18.0%
BBC Focus	40,929	70,326	36,636	68,144	38,454	71,783	5.0%	-6.0%
Front Magazine	-	-	34,002	38,002	37,801	41,946	11.2%	-
T3	32,093	60,127	-	-	30,037	59,143	-	-6.4%
Esquire	26,102	60,051	16,707	52,705	23,427	59,160	40.2%	-10.2%
Bizarre	30,958	40,936	-	-	20,938	28,979	-	-32.4%
Wired	-	-	-	-	19,447	48,275	-	-
Maxim	30,358	45,951	-	-	-	-	-	-
Arena	11,356	29,374	-	-	-	-	-	-

Title Performance

- *FHM* continues to lead the **Men's Lifestyle Monthlies** sector, even though it reported the largest YoY decline in UK newstrade sales at **(19.6%)**. The UK ABC figure of **152,027** is also a decline of **(3.5%)** PoP. This performance comes despite *FHM* reducing the cover price of the November issue from **£3.90** to **£2.50**, a strategy which no other titles in the sector adopted during this period.
- The two major fitness titles in the sector continue to perform well. *Men's Health* remains second in the sector after posting a UK newstrade ABC of **147,836**. This equates to a YoY decline of **(0.7%)**, but a PoP increase of **1.4%**. *Men's Fitness* posted a small YoY decline of **(0.9%)** and a PoP increase of **2.5%**.
- For the period JD09, *Loaded* has grown its UK newsstand sale by **3.4%**. This followed a PoP fall of **(20.8%)** last period and is the title's first instance of PoP growth since JD05.
- *Loaded* has the youngest readership of all titles in the sector, with **14.1%** of purchasers in the 18-24 year old age bracket, compared to an average of **9.0%** (Nectar data).
- The *Loaded* brand has also performed well online, with www.loaded.co.uk registering **323,233** unique users per month for JD09, an increase of **2.1%** PoP.
- *Stuff* posted a UK newstrade ABC figure of **58,619**, an increase of **2.1%** YoY and up **18.0%** PoP.
- *Wired*, which launched in April 2009, posted a debut UK newstrade ABC of **19,447**. The magazine reports on how technology affects culture, business, the economy and politics and is the title's second attempt at publication in the UK after failing here in 1995.

Men's Weeklies

The **Men's Weeklies** sector sold **14.0m** UK newstrade copies in 2009, resulting in a YoY decline of **(27.7%)**. The revenue generated by the **Men's Weeklies** sector fell by **(23.9%)** YoY to **£22.8m**.

In a tough climate, *Nuts* outperformed its rival *Zoo*, posting a decline of **(25.5%)** YoY in UK newstrade sales compared with the latter's fall of **(29.8%)** YoY. Annualised volumes for 2009 show that *Nuts* sold almost 3.5m UK newstrade copies more than *Zoo*.

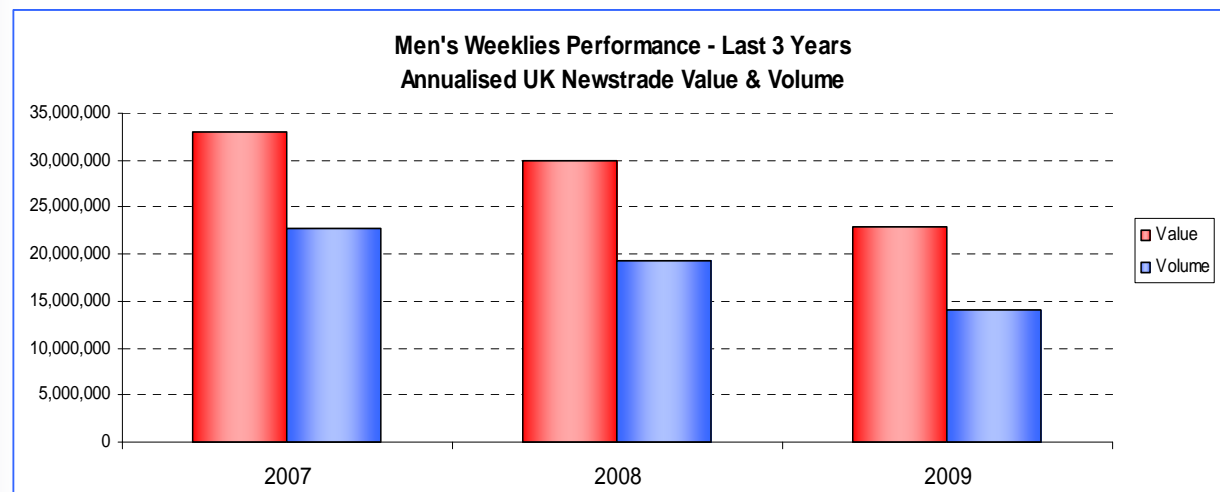
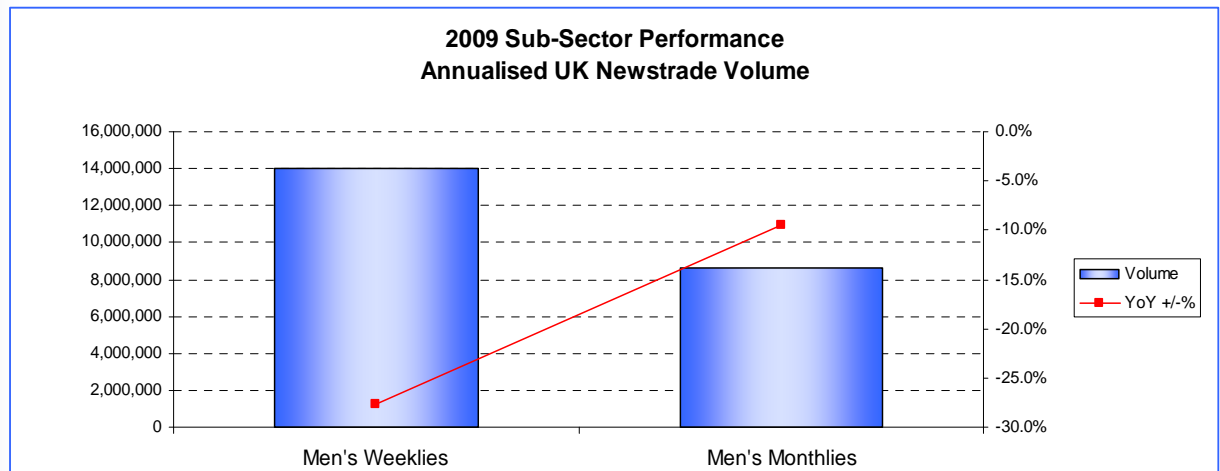
2009 Annualised Performance

Number of Titles in 2009:	2
ABC Sector RSV Rank:	12
2009 Annual RSV:	£22.8m
2009 Annual RSV YoY:	(23.9%)

Please note the above figures relate to UK newstrade performance for the whole of 2009

Although both titles are in decline, they are expected to bounce back having been hit hard by the recession. As the recession eases and economic recovery builds, spending on the weekly magazines is likely to return first, before it does on some of the premium monthly titles.

Readership profiles conducted by Mediaweek have suggested that readers of the **Men's Weeklies** sector are increasingly migrating to in-depth specialist magazines, such as technology and gadget titles. In an attempt to win back readers, *Nuts* underwent an editorial refresh in January, backed by a £500,000 marketing campaign. This ties into the magazine's exclusive deal to feature iconic Warbury Warriors football comic strip Striker, which is currently in its 25th year, and will see the *Nuts* brand in all 20 Premier League football grounds during the month of February.



Key Title	Jul-Dec 2008		Jan-Jun 2009		Jul-Dec 2009		PoP Change	YoY Change
	UK News	Total ABC	UK News	Total ABC	UK News	Total ABC	UK News	UK News
Nuts	223,618	234,034	178,515	188,532	166,524	176,835	-6.7%	-25.5%
Zoo	139,473	145,555	106,197	111,012	97,914	102,043	-7.8%	-29.8%

Title Performance

- *Nuts* has posted a UK newstrade ABC of **166,524**, which equates to a record **63.0%** share of the **Men's Weeklies** sector. This is up **0.3** percentage points PoP and **1.4** percentage points YoY.
- *Nuts* has continued to outperform *Zoo*, despite the latter publishing two cut price issues in the period and increasing its cover price to **£1.70** two months later than *Nuts*.
- In 2009 *Nuts* sold over **3.5m** more copies than *Zoo* at the UK newsstand and **6.7m** more than monthly title *FHM*.
- Nectar data shows that **28%** of customers in the sector have purchased both titles at least once in the latest 8 week period. **43.5%** of *Nuts* purchasers are in the 18-35 year old bracket, compared to **34.6%** for *Zoo*.
- The *Nuts*' brand continues to perform well across other platforms, with www.nuts.co.uk posting an ABCe of **1.46m** unique users per month for the JD09 period, up **3.5%** PoP.
- The two free titles in the sector, *ShortList* and *Sport*, continue to have a larger distribution than the paid-for titles. *ShortList*, published by Shortlist Media, led the sector with an average weekly distribution of **513,148**, an increase of **1.4%** YoY and **0.5%** PoP. *Sport*, owned by TalkSport parent UTV Media, was second in the sector with an average weekly distribution of **306,435**, down **(3.4%)** YoY but up **0.4%** PoP.

Soap

The **Soap** sector comprises three titles: one weekly and two fortnightlies. After being one of the few sectors to have experienced growth in recent years, there were small losses in sales in 2009.

UK newstrade volumes for the sector decreased by **(5.5)%** YoY during 2009, to **14.2m** copies. Revenue was down **(2.1)%** YoY to **£20.8m**.

2009 Annualised Performance

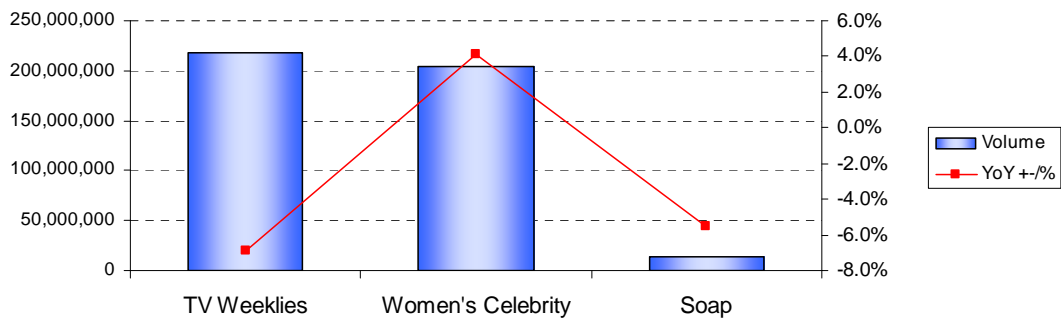
Number of Titles in 2009:	3
ABC Sector RSV Rank:	14
2009 Annual RSV:	£20.8m
2009 Annual RSV YoY:	(2.1%)

Please note the above figures relate to UK newstrade performance for the whole of 2009

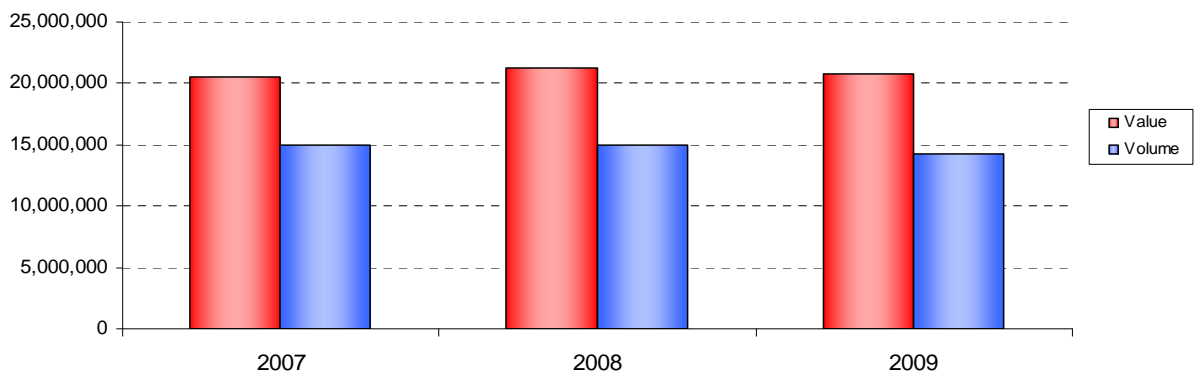
The UK's passion for soaps has continued through 2009. Whilst the major soaps often topped the TV viewing tables through the year, their popularity was clearly shown on Christmas Day as EastEnders received the highest viewing figures (Source: Broadcasters' Audience Research Board), whilst Coronation Street was also in the top ten. In the recession, it is possible soaps have become more popular again due to the escapism they offer. Research on Mintel has suggested that women are more likely to watch a programme where they can just switch off and not think about it (48% of those surveyed) and forget their own problems (24%).

As a genre, soaps stand out from other television programmes as one in which the audience invests both time and involvement, building relationships with characters over time. This should allow the **Soap** titles to continue playing a key role in the soap experience, with storyline revelations and insider knowledge on characters, that they would not be able to get elsewhere. EastEnder's 25th anniversary and celebratory live episode in February will also be an opportunity around which to build sales.

2009 Sector Performance Annualised UK Newstrade Volume



Soap Sector Performance - Last 3 Years Annualised UK Newstrade Value & Volume



Key Title	Jul-Dec 2008		Jan-Jun 2009		Jul-Dec 2009		PoP Change	YoY Change
	UK News	Total ABC	UK News	Total ABC	UK News	Total ABC	UK News	UK News
Inside Soap	183,811	188,273	176,961	181,883	172,880	177,304	-2.3%	-5.9%
Soaplif e	110,722	112,275	116,598	117,966	100,147	101,591	-14.1%	-9.6%
All About Soap	112,836	113,436	106,474	107,162	95,762	96,341	-10.1%	-15.1%

Title Performance

- *Inside Soap*, the only weekly title in the sector, continues to lead the market with a UK newstrade ABC of **172,880** copies. The title saw the lowest drop in sales in the market, down **(5.9%)** YoY.
- After a strong JJ09 period *Soaplif e* remains the leading fortnightly title in the market, posting a JD09 UK newstrade figure of **100,147**, down **(9.6%)** YoY.
- *All About Soap* posted a UK newstrade ABC of **95,762**, down **(15.1%)** YoY, but with a slightly better PoP decrease of **(10.1%)**.
- Nectar data suggests there is a high level of cross-purchase in the **Soap** sector. Over the last six months, **55%** of customers who have purchased *All About Soap* have also picked up another soap title, whilst **46%** of *Soaplif e* readers have. Over **5%** of Nectar shoppers who bought any soap magazine in the last six months, purchased all three titles.

Music - Rock

In 2009 the **Rock** sector saw a YoY decline of **(13.2%)** in UK newstrade volume for the monthly titles, with the weekly titles down **(28.1%)** YoY.

£18.8m worth of **Rock** magazines were sold in 2009, representing an RSV decline of **(17.8%)** YoY. This equated to **6.0m** UK newstrade copies, a YoY drop of **(22.3%)**.

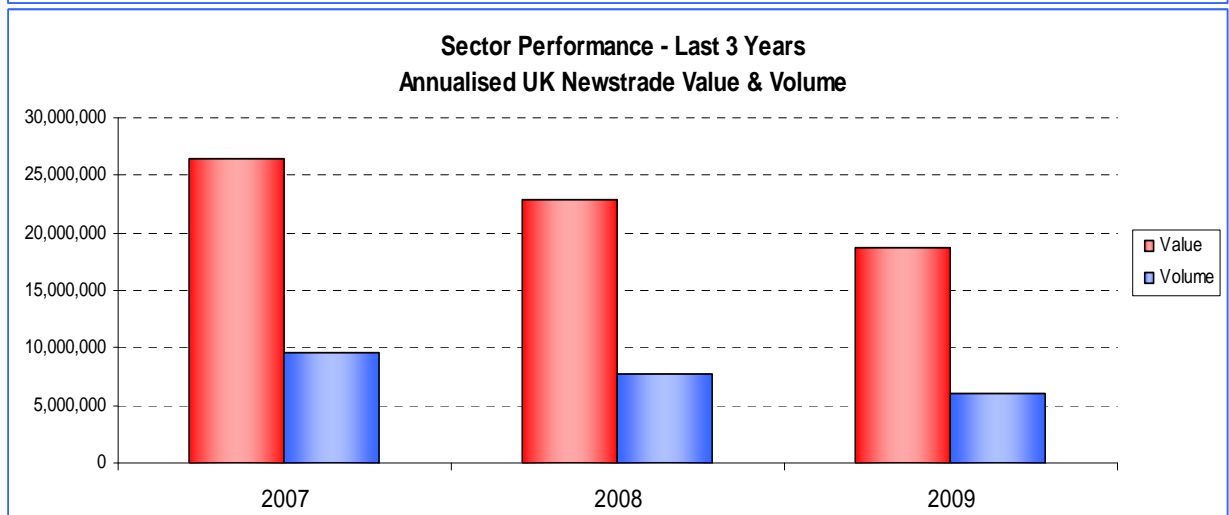
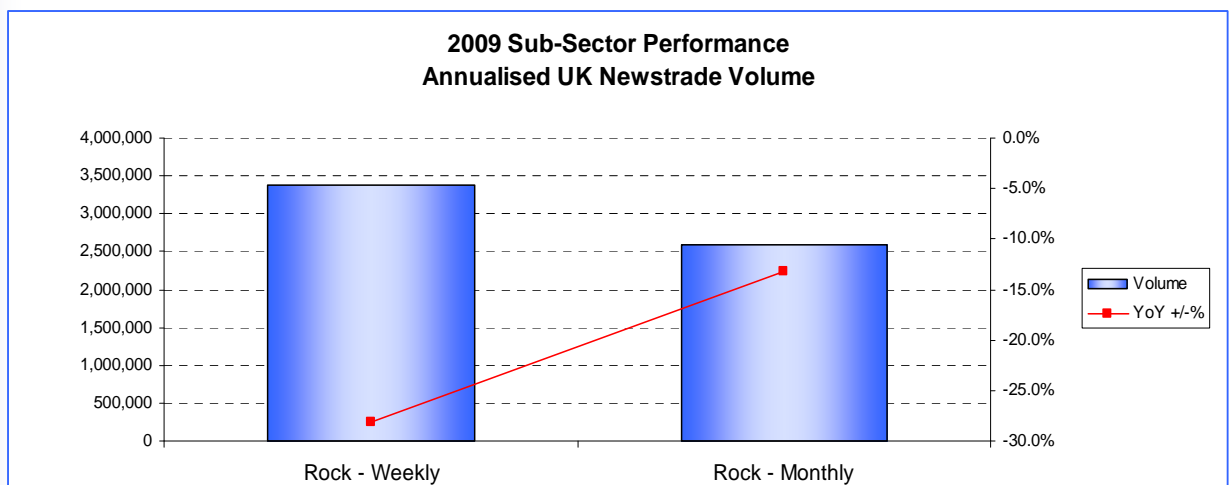
2009 Annualised Performance

Number of Titles in 2009:	8
ABC Sector RSV Rank:	16
2009 Annual RSV:	£18.8m
2009 Annual RSV YoY:	(17.8%)

Please note the above figures relate to UK newstrade performance for the whole of 2009

The effects of the recent advancements of digital music are illustrated in the decline of this sector. Due to the popularity of downloading music from websites such as iTunes, the traditional method of buying music from specialist high street stores is no longer a must. It is not all doom and gloom, however, as the popularity of broadband has caused more physical music sales to be made online thus suggesting that the overall interest in the industry is still great. This could therefore have a positive effect on the number of magazine subscriptions made online in the future.

The growth of digital music has also provided exciting new opportunities for music delivery. 2009 saw an increase in live gig attendances which may partly be an affect of the re-scheduling of a series of large-scale live tours earlier this year. 2009 also saw an increase in UK singles sales, a performance underpinned by a strong release schedule that captured the public's attention. There are also already a number of large music events planned in 2010 which should allow **Rock** magazines to further capitalise on this interest.



Key Title	Jul-Dec 2008		Jan-Jun 2009		Jul-Dec 2009		PoP Change	YoY Change
	UK News	Total ABC	UK News	Total ABC	UK News	Total ABC	UK News	UK News
Q	62,143	103,017	63,326	100,172	56,721	94,811	-10.4%	-8.7%
Mojo	42,899	100,507	43,269	97,722	42,102	98,484	-2.7%	-1.9%
Classic Rock	37,119	70,188	34,101	70,301	37,594	71,242	10.2%	1.3%
Kerrang!	45,066	52,272	36,933	43,253	34,803	41,125	-5.8%	-22.8%
Uncut	38,104	87,069	31,722	76,526	31,864	75,518	0.4%	-16.4%
NME	38,834	48,459	30,894	40,948	29,559	38,486	-4.3%	-23.9%
Metal Hammer	30,757	50,269	28,857	46,004	25,153	41,777	-12.8%	-18.2%
Word Magazine	16,367	34,280	-	-	13,389	26,555	-	-18.2%
Rock Sound	12,028	20,011	-	-	-	-	-	-

Title Performance

- Following on from PoP growth in the previous period, market leader *Q* records a fall in UK newstrade circulation of **(10.4%)** PoP. *Q* outsells *Mojo* at the newsstand by **15k** copies per issue, though for the JD09 period *Mojo* has posted a higher Total ABC than *Q* for the first time.
- *Classic Rock* posts a UK newstrade ABC of **37,594**, up **10.2%** on the previous period, whilst *Uncut* enjoys a small incremental PoP increase of **0.4%**. Nectar data shows that both titles have a strong male bias with *Classic Rock* predominantly attracting the **35-54** year old age group and *Uncut* the **45-64** year old age group. The **45-54** demographic, though core for both titles, has significantly increased for *Classic Rock* in the last six months which may be part of the reason that the title has enjoyed strong PoP growth.
- Although weeklies *NME* and *Kerrang!* have experienced double-digit YoY declines, more than **250,000** weekly music magazines are sold on the UK newsstand each month. Nectar data shows that, in Sainsbury's, weekly music magazine shoppers are likely to be frequent, big trolley customers. This makes the magazines valuable to Sainsbury's, despite their decline, due to the high spend and frequency of the shopping.

News & Current Affairs

The **News & Current Affairs** sector consists of four sub-sectors: **Business and Finance**, **Science**, **Current Affairs Domestic** and **Current Affairs International**.

In 2009 **7** titles recorded combined UK newstrade volumes of **8.0m** copies, and generated **£20.7m** in RSV. The **Domestic Current Affairs** sector recorded the strongest performance, dropping just **(0.4%)** in volume YoY.

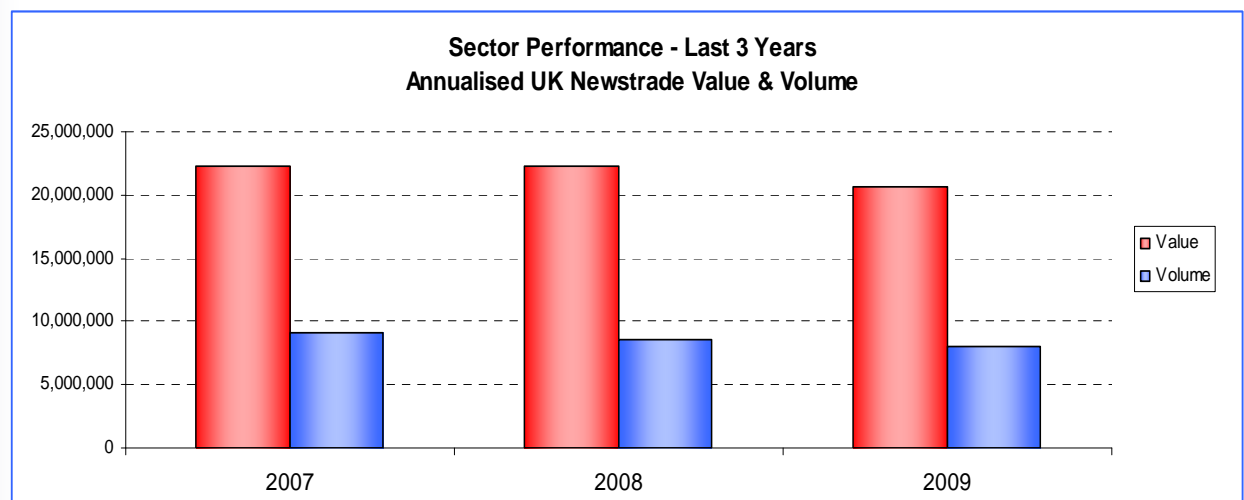
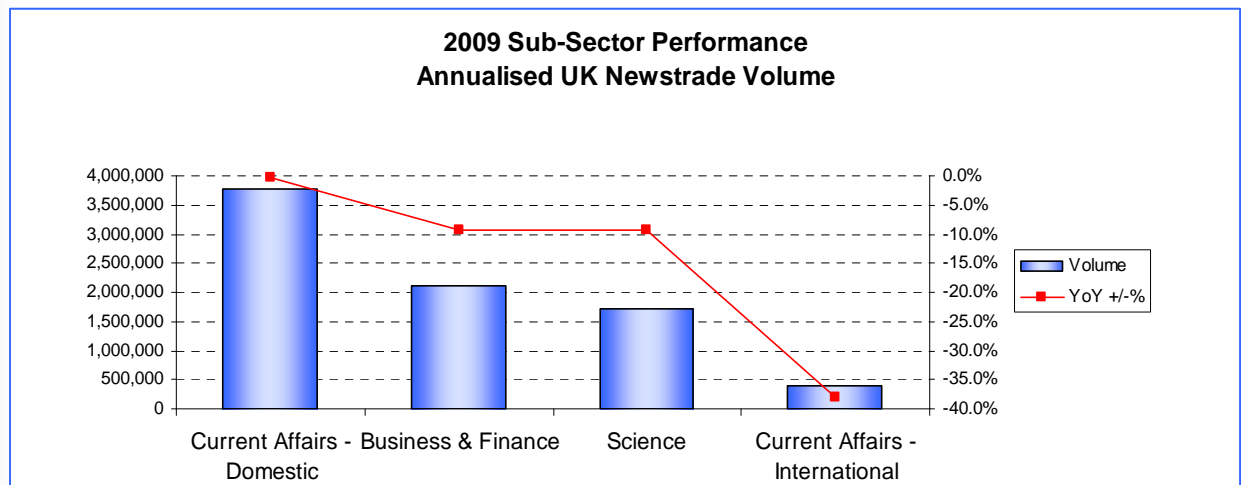
2009 Annualised Performance

Number of Titles in 2009:	7
ABC Sector RSV Rank:	15
2009 Annual RSV:	£20.7m
2009 Annual RSV YoY:	(7.0%)

Please note the above figures relate to UK newstrade performance for the whole of 2009

The continued popularity of **News & Current Affairs** magazines is dependent on their ability to offer something unique to the reader. Daily newspapers provide more immediate information, surpassed in turn by the instantly updated news websites. **News & Current Affairs** magazines are enjoyed during a reader's leisure time, providing greater depth and opinion on a story. For succinct business information, emails, daily newspapers and websites can be used, but it is the magazines that a reader turns to for further analysis and understanding.

The titles are largely read by men and in terms of social demographics, ABC1s dominate. The consistently rising number of these more affluent groups provide a favourable environment for the market in the future. Coverage of the 2010 UK General Election will also be an opportunity for these titles to grow sales.



Title	Jul-Dec 2008		Jan-Jun 2009		Jul-Dec 2009		PoP Change	YoY Change
	UK News	Total ABC	UK News	Total ABC	UK News	Total ABC	UK News	UK News
Private Eye	100,554	203,234	100,763	206,550	104,226	210,218	3.4%	3.7%
The Economist - United Kingdom Edition	40,060	186,995	32,855	187,341	34,562	189,201	5.2%	-13.7%
New Scientist - Worldwide Sales Excluding Australasia & US/Canada	35,987	109,313	34,274	106,911	32,796	101,060	-4.3%	-8.9%
The Irish Post	21,067	21,794	-	-	19,655	20,393	-	-6.7%
Investors Chronicle	6,954	30,421	7,259	30,027	7,700	30,006	6.1%	10.7%
Time Magazine - British Isles (BI)	12,107	134,316	8,643	133,958	7,213	130,264	-16.5%	-40.4%
History Today	4,559	23,313	-	-	4,717	22,501	-	3.5%

Title Performance

- *Private Eye* continues to lead the market, achieving UK newstrade sales of **104,226**. The fortnightly satirical title, which celebrates its 50th anniversary next year, has grown both PoP and YoY, and has achieved its highest Total ABC figure since 1992.
- After a growth of **5.2%** PoP, *The Economist* regains second place in the market after being overtaken by *New Scientist* in JJ09. However its UK newstrade performance of **34,562** is down (**13.7%**) on last year.
- By contrast *New Scientist* recorded a YoY decline of just (**8.9%**) YoY. Its unique proposition makes up the **Science** sector and the title achieved a UK newstrade ABC of **32,796** this period.
- *Investors Chronicle* shows the strongest YoY growth, up **10.7%**. Celebrating its 150th anniversary this year, the title's performance benefits from growing interest in investments and personal finance in the current economic climate.

Computing

The **Computing** sector is a large market divided into the following sub-sectors: **Internet, Mac, Miscellaneous, Multimedia, PC Business** and **PC Leisure**. Gaming titles covering computer consoles are categorised in a different sector.

Most titles in the **Computing** sector only release one ABC figure a year and **17** titles posted in JD09. **4.7m** UK newstrade copies were sold in 2009, a fall of **(21.3%)** YoY driven partly by the closure of *Personal Computer World* in June following more than 30 years of publication.

Personal computers are an essential platform for a nearly limitless range of digital content and applications and play a central role in most consumers lives. There are approximately **37 million** adults in the UK with home computing capabilities with penetration levels increasing by **25%** in the five years. Recent sales of computers, and in particular laptops, have been buoyant, with estimated sales volumes in 2008 up **12%** on 2007 levels. Much of this growth has been driven by online sales, with the internet offering a huge range of products and prices at a glance. Specialist PC retailers are struggling to compete and high street spending was forecast by Mintel to be down **(5.9%)** in 2009.

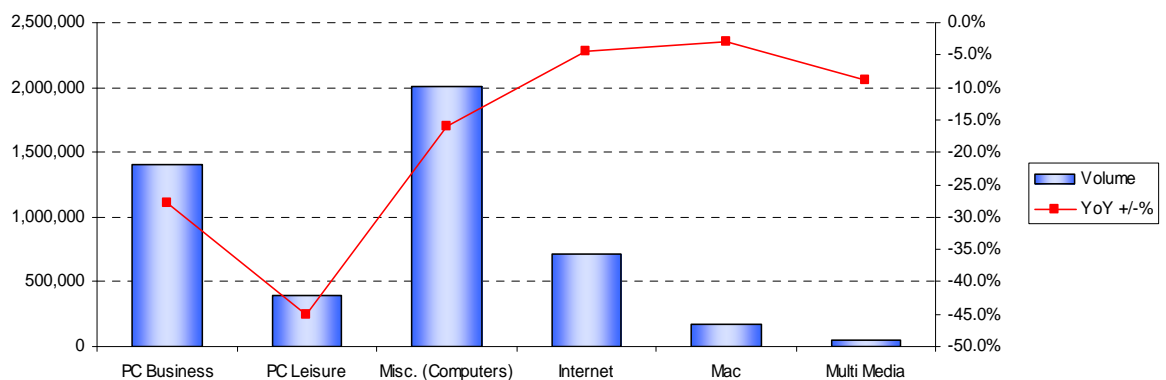
Technology innovations continue to emerge, however, and transform the competitive landscape. The growing popularity of netbooks, the continued move towards in-home entertainment and Microsoft's new Windows 7 software are all examples of developments and trends with potential to generate interest on the newsstand. Keen consumers will seek sources which provide information and expertise to help keep them at the cutting edge of technological advancements and the key for **Computing** magazines is to tap into the right topics at the right time and entice them back to the newsstand.

2009 Annualised Performance

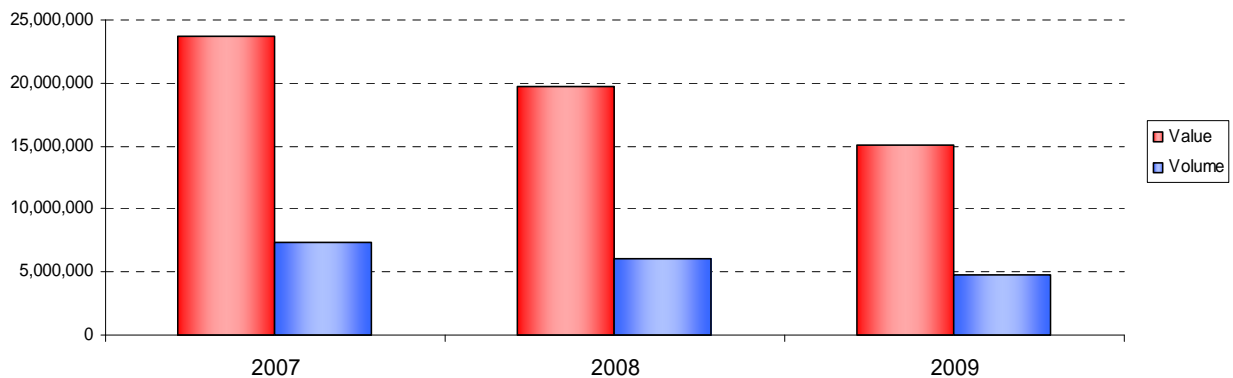
Number of Titles in 2009:	17
ABC Sector RSV Rank:	18
2009 Annual RSV:	£15.0m
2009 Annual RSV YoY:	(23.6%)

Please note the above figures relate to UK newstrade performance for the whole of 2009

2009 Sub-Sector Performance Annualised UK Newstrade Volume



Sector Performance - Last 3 Years Annualised UK Newstrade Value & Volume



Key Title	Jul-Dec 2007		Jul-Dec 2008		Jul-Dec 2009		PoP Change	YoY Change
	UK News	Total ABC	UK News	Total ABC	UK News	Total ABC	UK News	UK News
Computeractive	75,357	177,330	-	-	62,613	159,210	-	-16.9%
Computer Shopper	31,388	53,114	-	-	26,311	49,071	-	-16.2%
Web User	25,678	33,589	-	-	23,677	31,619	-	-7.8%
PC Pro	24,924	75,438	-	-	20,847	67,558	-	-16.4%
Micro Mart	16,181	17,552	-	-	14,643	16,024	-	-9.5%
Windows - The Official Magazine	-	-	-	-	13,307	19,426	-	-
MAC Format	13,721	29,447	-	-	13,083	27,242	-	-4.6%
Custom PC	14,681	23,667	-	-	11,779	20,986	-	-19.8%
Linux Format	9,295	28,734	-	-	8,765	27,147	-	-5.7%
What Laptop	9,922	10,756	-	-	8,049	8,250	-	-18.9%
PC Plus	11,267	22,162	-	-	7,168	17,419	-	-36.4%
Computer Music	6,934	18,261	-	-	6,318	17,427	-	-8.9%
PC Format	11,299	18,003	-	-	6,089	11,914	-	-46.1%
.NET - The Internet Magazine	5,888	18,343	-	-	5,502	18,019	-	-6.6%
Computer Arts	4,404	21,209	-	-	4,012	19,391	-	-8.9%
Imagine FX	4,310	16,809	-	-	3,933	16,815	-	-8.7%
Computer Arts Projects	2,421	10,472	-	-	1,978	8,308	-	-18.3%
Personal Computer World	22,884	54,069	-	-	-	-	-	-
Windows Vista - The Official Magazine	15,348	22,017	-	-	-	-	-	-
PC Answers	7,277	13,915	-	-	-	-	-	-
PC Live	3,869	6,486	-	-	-	-	-	-

Title Performance

- *Computeractive* remains the biggest selling computing title with a JD09 UK newstrade ABC of **62,613**. Though this was a fall of **(16.9%)** YoY, the fortnightly title sold over **1.6m** copies in 2009 to give it a market share of **34.3%** and annualised RSV of **£2.9m**.
- Fellow fortnightly *Web User* posted a UK newstrade ABC of **23,677**, down only **(7.8%)** YoY and retaining third position in the **Computing** sector. It is by far the biggest selling Internet title, however, with its nearest direct competitor, monthly title *.NET*, posting a UK newstrade ABC of just **5,502**.
- *Computer Shopper*, the second biggest selling title in the sector, experienced a **(16.2%)** drop in sales YoY to post a UK newstrade figure of **26,311**.
- *Windows – The Official Magazine* releases a debut UK newstrade ABC of **13,307**. The title replaces its predecessor *Windows Vista – The Official Magazine* on the newsstand to focus on Microsoft's new Windows 7 software.
- Two titles to suffer sharp YoY declines were *PC Plus* and *PC Format*, published by Future, which dropped by **(36.4%)** and **(46.1%)** respectively. Both are cover priced at **£5.99**.
- The sector's one major closure in 2008 was that of *Personal Computer World*, which ceased publication in June after 31 years on the newsstand. Its closure followed a prolonged period of declining circulation and an unprecedented fall in advertising levels.

Teenage Lifestyle

The **Teenage Lifestyle** sector consists of four titles, including two monthlies and two fortnightlies.

The sector's overall performance is in decline with UK newstrade volume decreasing by **(17.3%)** YoY to **5.5m** copies. Revenue fell by **(13.9%)** YoY with the four titles generating a total of **£12.8m** in RSV over the course of 2009.

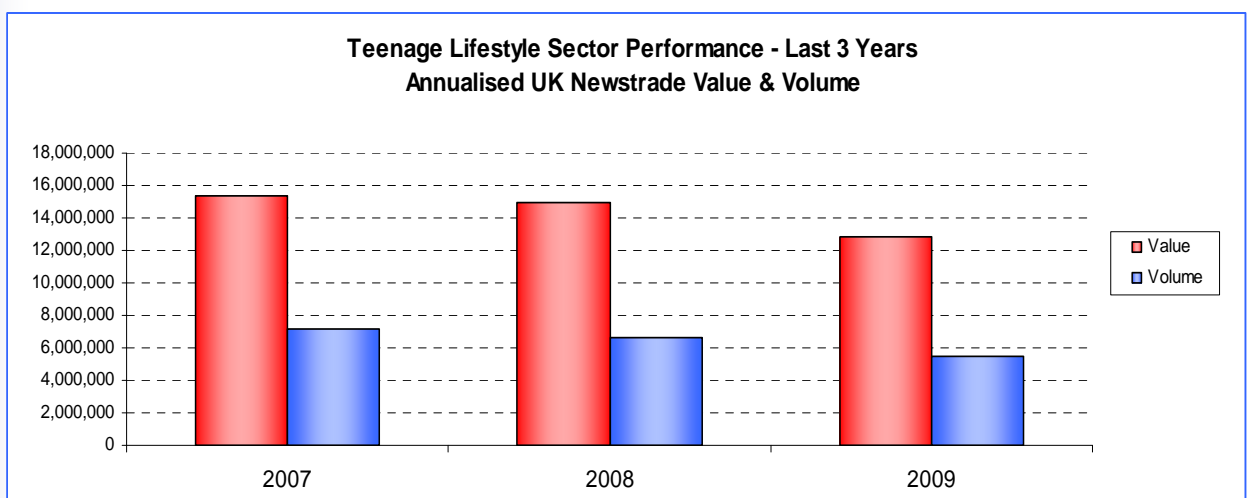
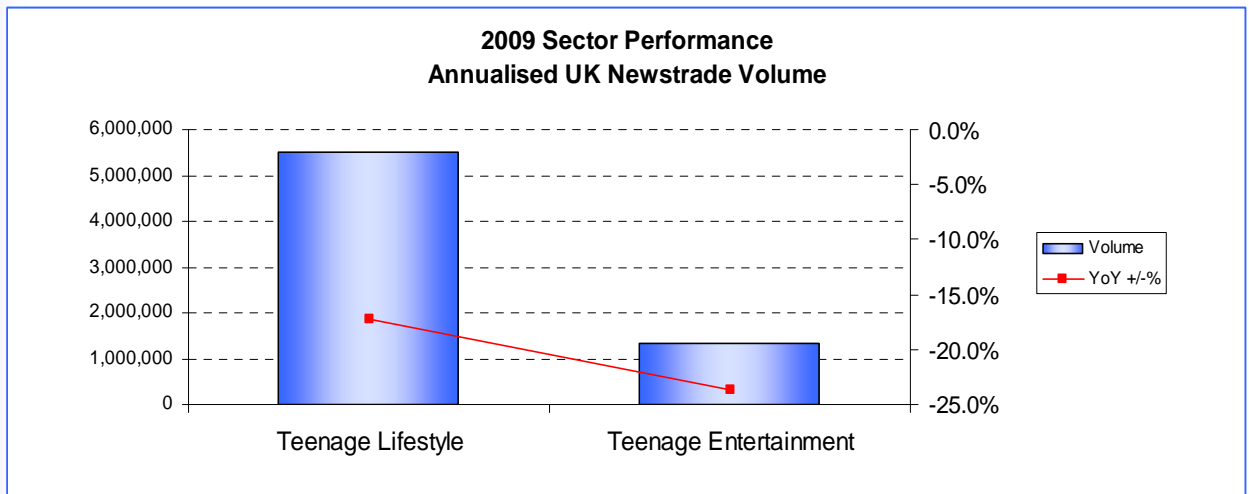
2009 Annualised Performance

Number of Titles in 2009:	4
ABC Sector RSV Rank:	19
2009 Annual RSV:	£12.8m
2009 Annual RSV YoY:	(13.9%)

Please note the above figures relate to UK newstrade performance for the whole of 2009

The **Teenage Lifestyle** market is evidently a very tough one at the moment, with challenges from new media particularly potent. Core teenage interests typically included in magazines, such as music and gossip, are increasingly well covered both online and by celebrity magazines. Mintel research suggests that one of the concerns for the market is that the older spectrum may be moving on to adult celebrity titles at an earlier age. Additionally they go on to suggest that for the younger end of the spectrum, who are primarily interested in friends, chat, gossip and being in constant touch, digital applications could not be better designed for their lifestyle. Nectar data shows that purchasers of the teenage sector (who can be assumed to be the parents) over-index on 'Wealthy Achievers'. This would in turn mean the teen is more likely to have their own laptop and mobile phone and therefore instant, up to date alternatives to magazines.

To stay competitive, the teen titles will need to continue developing their online and mobile media brands and focus on the under 15 age range, who are yet to move on to the adult celebrity titles.



Key Title	Jul-Dec 2008		Jan-Jun 2009		Jul-Dec 2009		PoP Change	YoY Change
	UK News	Total ABC	UK News	Total ABC	UK News	Total ABC	UK News	UK News
Sugar	142,217	153,721	126,712	140,599	128,475	140,980	1.4%	-9.7%
Bliss	86,144	90,727	80,023	86,054	83,373	88,801	4.2%	-3.2%
Shout	77,362	81,904	71,907	76,568	66,491	72,008	-7.5%	-14.1%
Mizz	52,894	58,302	47,720	54,068	44,627	49,230	-6.5%	-15.6%

Title Performance

- *Sugar* is once again the top selling title in the **Teenage Lifestyle** sector, with a UK newstrade of **128,475**, down **(9.7%)** YoY. The title has performed well PoP, however, posting an increase of **1.4%**.
- *Bliss* remains in second place, reporting a JD09 UK newstrade figure of **83,373**. This was a decline of **(3.2%)** YoY, the lowest of the four titles, and a notable PoP rise of **4.2%**.
- *Shout* was the leading fortnightly title and recorded a UK newstrade figure of **66,491**, down **(14.1%)** YoY, whilst *Mizz* was down **(15.6%)** YoY.
- It is notable that the two monthly titles (*Sugar* and *Bliss*) have fared a lot better in the latest period than the fortnightlies (*Shout* and *Mizz*), with the monthlies both recording PoP increases.

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