



ABC Market Summary Report January - June 2011

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Important Notes:

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 start of this report focuses on **UK newstrade** volume and revenue only, and therefore excludes all overseas, subscription, bulk and free copies. The **Total ABC** column quoted in the data table on page 6, however, do include sales from every channel.

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.

UK revenue figures are calculated using UK newstrade volume figures and cover price data supplied by ABC.

Some ABC sectors or sub-sectors have been split into further sub-sectors to allow for more pertinent analysis, though only the term 'sector' is referred to throughout.



ABC Highlights

Market Overview

The UK ABC newstrade market was worth **£509.6 million** in JJ11, down **(7.4%)** YoY. This equates to copy sales of **387.5 million**, down **(6.1%)** YoY. **11.3%** of all copies sold were at a discounted price in JJ11. The **Women's Home Interest** sector is the only sector in growth for volume and value within this period.

Women's Celebrity Weeklies

Northern & Shell titles *New!*, *OK!* and *Star* remain three of the top four titles but are all showing a decline in sales YoY. **33.3%** of copies sold in this sector were at a discounted price in JJ11, while over **50%** of Northern & Shell's volume was at a reduced price. *HELLO!* is the only title with an increase in volume YoY of **27.3%**. *Heat* is the worst performing title, posting a **(22.9%)** YoY decrease.

Women's Traditional Weeklies

Women's Traditional Weeklies is down **(5.4%)** in volume YoY. *Take a Break* is still the sector leader but showing a **51K** copy decline YoY, a drop of **(6.0%)**. *Chat* and *That's Life* take **2nd** and **3rd** position. *Women's Weekly* takes **4th** position with just a **(0.2%)** decline in sales YoY, the smallest decrease within the sector. **5.4%** of copies within this sector were at a discounted price.

TV Weeklies

The **TV Weeklies** sector is down in volume by **(1.9%)** YoY for the JJ11 period. *TV Choice* remains the biggest selling title in the sector – and the market – but is down **(0.6%)** PoP in volume. **2nd** place title *What's on TV* has closed the sales gap with growth of **1.3%** PoP and continues to generate more revenue at a **17%** higher cover price. *Radio Times'* UK newstrade ABC falls **(8.5%)** YoY.

Women's Fashion/ Lifestyle

Glamour is the only title within the **Women's Fashion / Lifestyle** sector showing a significant increase in sales PoP and YoY at **11.5%** and **2.6%** respectively. *Prima* also has a **7.2%** PoP increase while *Company* records an **(18%)** decline in volume and is the worst performing title in this sector. *Red* and *Elle* outperform the sector with modest YoY declines of **(2.4%)** and **(1.8%)** respectively.

Children's Magazines

The main event within the **Children's Magazine** sector was the new launch of *Moshi Monsters Magazine* in JJ11, generating a first UK newstrade ABC of **112,168**. This has helped soften the decline in this sector. *Animal Planet* was launched within the JJ11 period, while *Animals and You* had a notable increase in volume with YoY growth of **27.4%**.

Women's Home Interest

Women's Home Interest sector is performing well in JJ11 showing a **2.5%** increase in volume and **0.4%** increase in value. *Ideal Home* remains the sector leader with a UK newstrade ABC of **140,047**. *Good Homes* volume grew **35.8%** PoP and **18.2%** YoY. New launch *Style at Home* performed well with a debut UK newstrade figure of **52,576**.

Men's Lifestyle Monthlies

The **Men's Lifestyle Monthlies** sector declined by **(25.8%)** in the period JJ11. *Healthy for Men* was the only title that showed growth YoY. *FHM* had a staggering fall of **(31.0%)** YoY to post the poorest performance in the sector. There were a few titles in this sector that did not post an ABC in this period.

Men's Weeklies

A double-digit YoY decline in volume is seen in the **Men's Weeklies** sector. IPC's *Nuts* posts a UK newstrade ABC of **104,789**, maintaining a lead of **54k** copies per issue on *Zoo Weekly*.

Soap

The **Soap** sector records a decline of **(4.5%)** YoY in JJ11. Weekly title *Inside Soap* posts a UK newstrade ABC of **159,814**. Fortnightly title *Soaplife* is up **1.4%** YoY and **0.6%** PoP.

Teenage Lifestyle

Excluding previous ABC figures for *Sugar*, which ceased publication in JJ11, the **Teenage Lifestyle** sector is down **(24.6%)** YoY. Despite this decline, *Bliss* posted excellent PoP growth of **6.5%** and is the new sector leader with a UK newstrade ABC of **68,180** in JJ11.

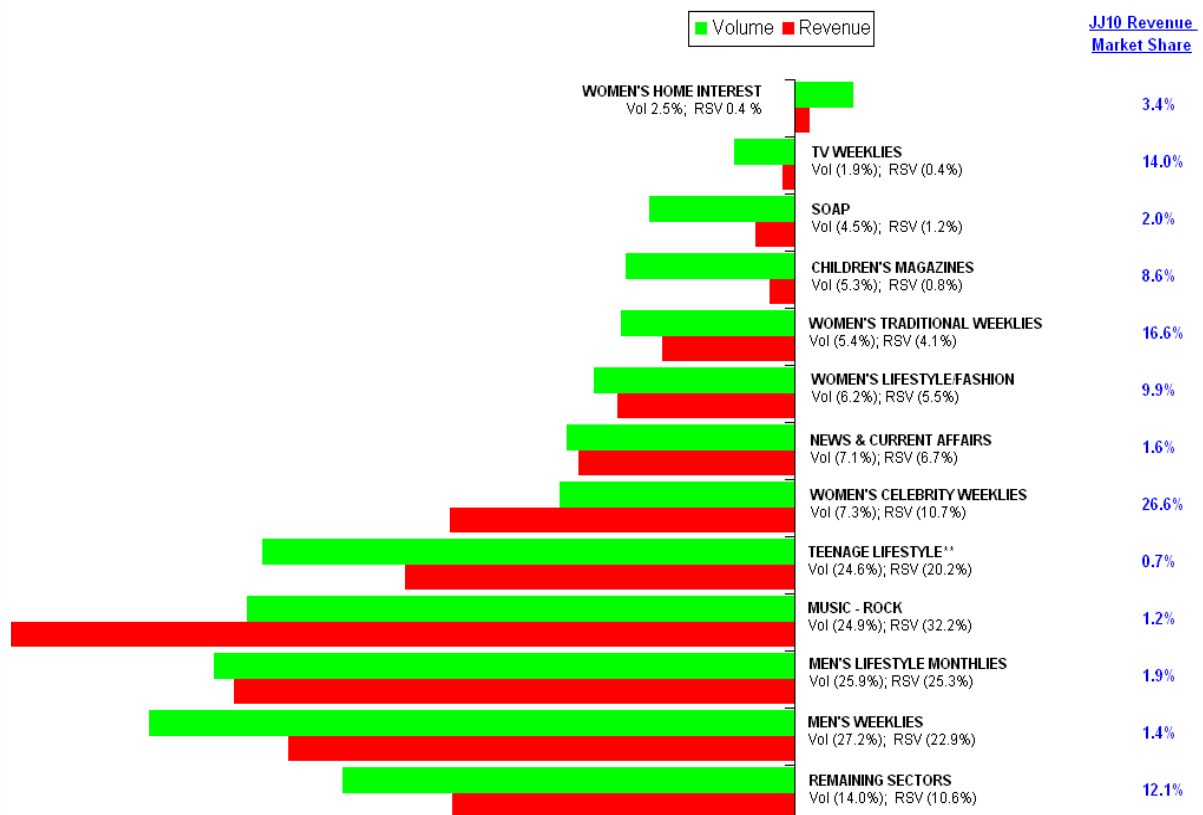
Other Highlights

Amateur Gardening enjoys a fine Spring and posts PoP growth of **17.4%** following a successful relaunch in 2010. *Golf Monthly* also posts a strong PoP increase to close the gap on the sector leader. In the **News & Current Affairs** sector *New Scientist* records a UK newstrade ABC of **27,976** to overtake *The Economist* on the newsstand.

Market Sector Overview

- ▶ The News & Magazines Consumer Price Index (CPI) stood at **127.2** at the end of JJ11. It remained in YoY growth throughout the six-month period with a low of **1.6%** in March and a high of **2.3%** for June. It consistently tracked below the total CPI as overall inflation finished at **4.2%** in June 2011, following a high of **4.5%** in April and May. This small drop was driven by a sharp fall in prices of computer consoles and electrical products like TVs and digital cameras, which outweighed another rise in food prices. Also, prices of clothing and footwear fell earlier than usual for the summer sales season. GDP increased by **0.2%** in the second quarter of 2011, following an increase of **0.5%** in the first quarter of 2011 as the economy continued its slow recovery from recession. The additional bank holiday, the Royal Wedding and warm weather in April were amongst the factors blamed for the decline in growth. (Source: ONS)
- ▶ The UK newstrade ABC magazine market was worth **£509.6 million** in JJ11, a drop of **(7.4%)** YoY. Volume sales declined by **(6.1%)** YoY to **387.5 million** copies. The larger decline in revenue is mainly driven by permanent price cuts by *OK!* and *Star*, two of Northern & Shell's three **Women's Celebrity Weeklies** titles.
- ▶ The strongest sales performance comes from the **Women's Home Interest** sector, which records a volume increase of **2.5%** YoY. This growth is partly due to the launch of *Style at Home* in January, however three other titles post YoY growth. The **TV Weeklies** sector also outperforms the market with volume decline of just **(1.9%)** as both leading titles record YoY growth.
- ▶ The graph below shows periodised YoY UK newstrade performance for a selection of key Marketforce sectors, with the remaining **6.1%** of the volume market summarised under **Remaining Sectors**. The important specialist markets of **Motoring**, **Leisure** and **Sport** are not split out here as the bulk of titles in these sectors do not audit for the January-June ABC period.

JJ11 vs JJ10 UK Newstrade YoY Performance



** Like for like titles only

New Launch & Debut ABC Round Up

Title	Publisher	Sector	Sub Sector	UK News	Export	Subs	Total
Moshi Monsters Magazine	Skyjack Publishing	Children's Magazines	Pre-Teen - General	112,168	-	1,580	113,748
Something Special	BBC Worldwide	Children's Magazines	Pre-School	61,748	-	-	61,748
Style at Home	IPC Southbank	Women's Interests	Home Interest	52,576	-	-	52,576
Fancy Magazine	River Publishing	Women's Interests	Cookery & Kitchen	50,047	-	-	50,047
Womans Way Cookbook	Harmonia	Women's Interests	Cookery & Kitchen	20,440	-	-	20,440
U Magazine Ultimate Girls Guide	Harmonia	Women's Interests	Women's Lifestyle/Fashion	16,225	-	-	16,225
Animal Planet	D.C. Thomson & Co. Ltd.	Children's Magazines	Pre-Teen - General	14,974	-	150	15,124
Airfix Model World	Key Publishing Ltd	Leisure Interests	Aviation	7,298	3,900	984	12,182
Irish Tatler Man	Harmonia	Men's Lifestyle	Men's Lifestyle	4,474	-	5	7,557

- ▶ Two of the biggest launches in the JJ11 period has been a result of the brand extension activities.
- ▶ *Moshi Monsters Magazine* was the biggest launch in the JJ11 period, delivering an average UK newstrade sale of **112,168** over its first three issues. The title is a brand extension from the fastest-growing online game for children, which recently attracted over 50 million users worldwide. *Moshi Monsters Magazine*, launched in February 2011, includes puzzles, comic strips, competitions and hint and tips for players of the online game. Moreover, the title benefits from the direct contact with the online gaming community by including their creative ideas in the magazine and so bringing it even closer to its readers.
- ▶ BBC Worldwide's *Something Special* recorded a debut UK newstrade figure of **61,748**. The four-weekly title, launched in April, is the ninth addition to the BBC's portfolio of pre-school magazines. The magazine is targeted to children with learning and communication difficulties and is based on the CBeebies TV programme *Something Special*. The magazine contains plenty of fun activities for children with special needs and features Makaton signs and symbols, helping families to communicate.
- ▶ IPC Southbank's new launch *Style at Home* releases an impressive debut UK newstrade ABC figure of **52,576**. The monthly title has been a strong addition to the IPC Southbank's Home Interest portfolio. The magazine is targeted to budget-conscious women with a passion for home styling and decorating. It contains ideas for a hands-on approach on how to improve the home environment with tips on affordable shopping. *Style at Home* also includes a 12-page pull-out food magazine. The title has been launched after the successful trial issues earlier in the year.
- ▶ *Fancy Magazine*, published by River Publishing, posts a UK newstrade figure of **50,047**. The magazine is produced by Julian Graves, the UK's largest independent specialist natural food and ingredients retailer. The editorial content reflects on the store's brand values and includes cooking and baking tips, recipes and advice on nutrition and well-being and is supported by online content at www.fancymagazine.co.uk.



Top 100 UK Newstrade Titles

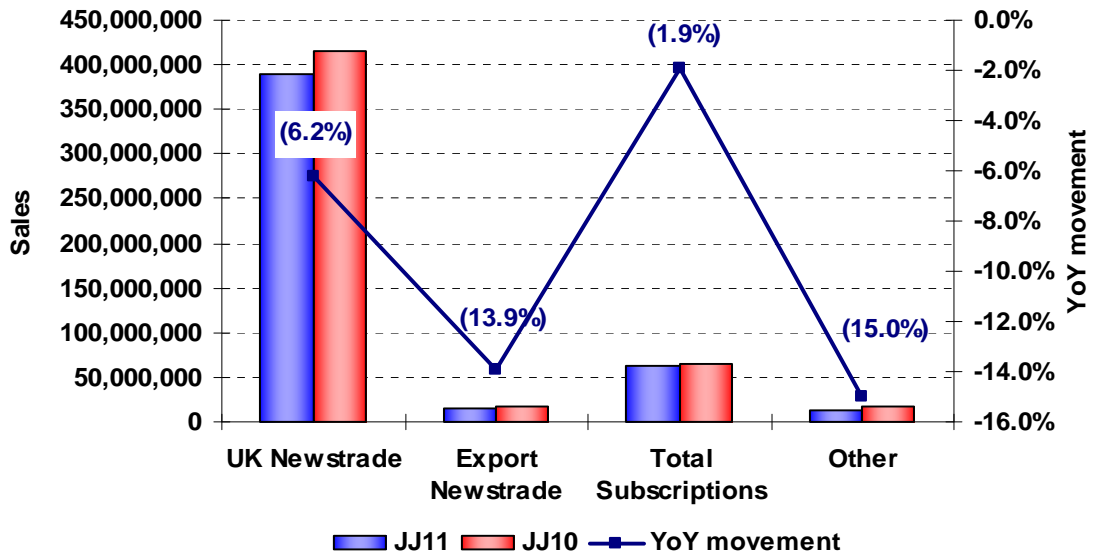
*Marketforce titles are highlighted in blue and Export only titles in light blue

Rank	Title	Jan - Jun 2010		Jul - Dec 2010		Jan - Jun 2011		YoY Change		PoP Change	
		UK Newstrade ABC	Total ABC	UK Newstrade ABC	Total ABC	UK Newstrade ABC	Total ABC	UK Newstrade ABC	Total ABC	UK Newstrade ABC	Total ABC
1	TV Choice	1,309,469	1,309,469	1,362,384	1,362,384	1,354,761	1,354,761	3.5%	3.5%	-0.6%	-0.6%
2	What's on TV	1,206,300	1,209,018	1,254,760	1,257,028	1,271,675	1,271,675	5.4%	5.4%	1.3%	1.4%
3	Take a Break	848,843	855,372	826,281	833,522	797,519	803,555	-6.0%	-6.1%	-3.5%	-3.6%
4	Radio Times	752,233	947,131	763,221	960,839	688,131	901,036	-8.5%	-4.9%	-8.8%	-6.2%
5	New!	573,560	577,899	556,912	562,284	512,071	515,975	-10.7%	-10.7%	-8.1%	-8.2%
6	Closer	512,407	526,713	484,925	498,683	448,306	458,693	-12.5%	-12.7%	-7.6%	-7.8%
7	OK! Magazine	452,634	478,878	429,774	450,946	446,950	473,167	-1.3%	-1.2%	4.0%	4.9%
8	Glamour	416,844	526,216	383,648	500,591	427,735	530,060	2.6%	0.7%	11.5%	5.9%
9	Star	436,234	440,862	425,429	430,324	402,419	405,688	-7.8%	-8.0%	-5.4%	-5.7%
10	Chat	417,933	430,674	399,758	415,040	378,814	391,749	-9.4%	-9.0%	-5.2%	-5.6%
11	Slimming World Magazine	287,618	302,738	317,513	336,607	330,100	349,566	14.8%	15.5%	4.0%	4.0%
12	That's Life	339,416	341,545	333,253	335,772	319,228	321,332	-5.9%	-5.9%	-4.2%	-4.3%
13	Reveal	326,681	332,212	318,641	324,590	305,705	311,176	-6.4%	-6.3%	-4.1%	-4.1%
14	Woman's Weekly	297,786	338,577	303,726	344,068	297,196	339,993	-0.2%	0.4%	-2.1%	-1.2%
15	Now	325,044	338,080	323,897	338,328	296,592	309,202	-8.8%	-8.5%	-8.4%	-8.6%
16	Heat	379,275	417,163	333,446	370,132	292,430	326,677	-22.9%	-21.7%	-12.3%	-11.7%
17	HELLO!	222,126	412,195	244,478	405,608	282,696	413,311	27.3%	0.3%	15.6%	1.9%
18	Woman	310,519	318,301	301,613	309,873	278,845	285,731	-10.2%	-9.9%	-7.5%	-7.5%
19	Look	300,740	313,358	297,089	311,425	276,390	300,161	-8.1%	-4.2%	-7.0%	-3.6%
20	Best	296,698	302,309	288,030	294,161	276,064	280,218	-7.0%	-7.3%	-4.2%	-4.7%
21	TV Times	278,068	290,686	296,314	309,510	275,214	290,303	-1.0%	-0.1%	-7.1%	-6.2%
22	Cosmopolitan	284,017	401,750	274,581	400,575	271,050	386,852	-4.6%	-3.7%	-1.3%	-3.4%
23	Pick Me Up	308,117	319,305	273,352	287,029	251,245	261,588	-18.5%	-18.1%	-8.1%	-8.9%
24	Sainsbury's Magazine	284,199	291,905	290,486	300,027	245,150	255,072	-13.7%	-12.6%	-15.6%	-15.0%
25	Woman's Own	264,839	272,376	284,148	291,700	237,902	245,868	-10.2%	-9.7%	-16.3%	-15.7%
26	Bella	244,730	246,446	243,042	245,286	237,840	239,660	-2.8%	-2.8%	-2.1%	-2.3%
27	Peoples Friend	252,071	291,394	245,289	282,766	228,032	266,230	-9.5%	-7.9%	-7.0%	-5.1%
28	Yours	227,437	297,231	224,229	293,016	215,009	285,890	-5.5%	-3.8%	-4.1%	-2.4%
29	Woman & Home	223,629	369,321	234,222	385,800	213,457	370,284	-4.5%	0.3%	-8.9%	-4.0%
30	Love It!	224,136	231,617	235,297	242,315	210,682	212,168	-6.0%	-8.4%	-10.5%	-12.4%
31	Real People	218,217	225,145	211,252	218,276	203,010	206,850	-7.0%	-7.2%	-3.9%	-4.3%
32	Weightwatchers Magazine	194,538	203,656	194,523	203,566	191,132	200,025	-1.8%	-1.8%	-1.7%	-1.7%
33	Good Housekeeping	189,520	422,496	215,551	443,750	188,617	430,878	-0.5%	2.0%	-12.5%	-2.9%
34	Grazia	183,733	228,770	182,651	224,421	175,732	219,741	-4.4%	-3.9%	-3.8%	-2.1%
35	Marie Claire	193,209	280,021	173,595	265,042	171,736	250,785	-11.1%	-10.4%	-1.1%	-5.4%
36	Full House	174,744	175,869	172,746	173,999	167,072	168,240	-4.4%	-4.3%	-3.3%	-3.3%
37	Company	200,360	217,324	199,431	217,991	164,216	180,162	-18.0%	-17.1%	-17.2%	-17.2%
38	More!	172,094	187,159	179,753	188,265	162,803	170,033	-5.4%	-9.2%	-9.4%	-9.7%
39	TV Easy	166,774	166,781	168,922	168,929	162,137	162,145	-2.8%	-2.8%	-4.0%	-4.0%
40	Inside Soap	170,145	175,083	170,702	175,191	159,814	165,022	-6.1%	-5.7%	-6.4%	-5.8%
41	Healthy	153,729	154,683	162,101	164,872	156,861	160,064	2.0%	3.5%	-3.2%	-2.9%
42	Prima	161,521	289,058	140,191	268,421	150,245	280,207	-7.0%	-3.1%	7.2%	4.4%
43	Red	150,828	230,067	148,995	231,028	147,198	231,160	-2.4%	0.5%	-1.2%	0.1%
44	TV & Satellite Week	155,074	184,134	151,369	181,150	144,771	176,837	-6.6%	-4.0%	-4.4%	-2.4%
45	Ideal Home	145,977	205,659	146,411	203,020	140,047	205,778	-4.1%	0.1%	-4.3%	1.4%
46	BM (formerly Bon Marche)					136,388	136,388				
47	Men's Health	135,543	245,754	143,863	245,923	119,335	218,388	-12.0%	-11.1%	-16.9%	-11.2%
48	Your Home	118,013	130,353	116,851	129,695	119,156	133,018	1.0%	2.0%	2.0%	2.6%
49	Elle (U.K.)	120,195	195,625	127,614	200,531	117,978	197,136	-1.8%	0.8%	-7.6%	-1.7%
50	BBC Good Food	130,399	305,855	155,808	332,198	117,832	294,720	-9.6%	-3.6%	-24.4%	-11.3%
51	My Weekly	127,311	134,393	123,268	130,190	117,404	124,671	-7.8%	-7.2%	-4.8%	-4.2%
52	Moshi Monsters Magazine					112,168	113,748				
53	Total TV Guide	103,669	109,022	115,749	121,379	111,545	117,448	7.6%	7.7%	-3.6%	-3.2%
54	Nuts	137,791	147,134	132,010	142,212	104,789	114,019	-24.0%	-22.5%	-20.6%	-19.8%
55	Instyle UK	109,992	186,251	108,554	180,574	104,583	175,113	-4.9%	-6.0%	-3.7%	-3.0%
56	BBC Gardeners' World	104,157	260,133	64,795	212,439	102,644	265,328	-1.5%	2.0%	58.4%	24.9%
57	Soaplife	97,576	99,434	98,338	100,237	98,945	100,798	1.4%	1.4%	0.6%	0.6%
58	Empire	105,589	179,064	100,155	172,639	98,491	171,013	-6.7%	-4.5%	-1.7%	-0.9%
59	Vogue	103,757	210,561	111,402	211,277	98,014	210,766	-5.5%	0.1%	-12.0%	-0.2%
60	Top of the Pops	103,248	104,709	93,339	94,224	97,450	98,030	-5.6%	-6.4%	4.4%	4.4%
61	BBC Top Gear Magazine	100,763	190,375	100,029	191,539	92,837	190,535	-7.9%	0.1%	-7.2%	-0.5%
62	Private Eye	97,024	207,680	96,171	207,154	92,818	206,266	-4.3%	-0.7%	-3.5%	-0.4%
63	Essentials	88,943	115,432	96,471	126,379	91,441	126,904	2.8%	9.9%	-5.2%	0.4%
64	All About Soap	95,088	95,578	91,000	91,633	90,396	90,861	-4.9%	-4.9%	-0.7%	-0.8%
65	Country Living	93,391	204,235	90,118	205,770	84,570	200,027	-9.4%	0.9%	-6.2%	0.1%
66	FHM	121,181	192,586	104,910	177,261	83,647	155,557	-31.0%	-19.2%	-20.3%	-12.2%
67	Easy Living	91,434	170,054	82,225	160,061	82,139	158,038	-10.2%	-7.1%	-0.1%	-1.3%
68	House Beautiful	84,434	152,109	100,485	165,161	77,672	143,106	-8.0%	-5.9%	-22.7%	-13.4%
69	Fun to Learn - Peppa Pig	72,219	72,476	64,969	65,141	75,426	75,796	4.4%	4.6%	16.1%	16.3%
70	25 Beautiful Homes	79,306	112,117	74,084	107,842	75,414	107,974	-4.9%	-3.7%	-1.8%	0.1%
71	Fun to Learn - Friends	72,863	73,565	68,463	69,331	71,670	72,418	-1.6%	-1.6%	4.7%	4.5%
72	Ben 10	74,013	74,013	71,104	71,104	71,222	71,222	-3.8%	-3.8%	0.2%	0.2%
73	Rosemary Conley Diet & Fitness	81,059	92,002	89,039	99,842	70,001	82,137	-13.6%	-10.7%	-21.4%	-17.7%
74	Bliss	79,227	84,141	64,045	69,212	68,180	73,002	-13.9%	-13.2%	6.5%	5.5%
75	Homes & Gardens	69,992	136,136	63,964	137,296	67,833	137,812	-3.1%	1.2%	6.0%	0.4%
76	Irish Farmers Journal	65,488	70,064	66,537	70,405	66,023	71,022	0.8%	1.4%	-0.8%	0.9%
77	National Enquirer - UK Edition	71,560	71,649	69,531	69,576	65,658	65,684	-8.2%	-8.3%	-5.6%	-5.6%
78	What Car?	67,312	84,425	68,704	87,268	63,859	82,029	-5.1%	-2.8%	-7.1%	-6.0%
79	Girl Talk	66,340	67,929	66,470	67,959	63,615	65,129	-4.1%	-4.1%	-4.3%	-4.2%
80	Disney's Princess	67,261	67,502	57,708	58,011	63,023	63,328	-6.3%	-6.3%	9.2%	9.0%
81	Something Special					61,748	61,748				
82	Cbeebies Art	49,929	49,929	51,586	51,586	61,327	61,327	22.8%	22.8%	18.9%	18.9%
83	Cbeebies Special	51,379	51,379	50,422	50,422	60,708	60,708	18.2%	18.2%	20.4%	20.4%
84	The Simpsons Comics	77,580	81,862	73,595	77,590	60,516	64,882	-22.0%	-20.7%	-17.8%	-16.4%
85	Healthy for Men	56,356	56,356	59,992	59,992	60,499	60,499	7.4%	7.4%	0.8%	0.8%
86	Zest	71,644	99,485	61,626	88,554	58,346	87,100	-18.6%	-12.4%	-5.3%	-1.6%
87	In The Night Garden	60,060	60,060	58,686	58,686	57,408	57,408	-4.4%	-4.4%	-2.2%	-2.2%
88	Psychologies Magazine	61,121	119,025	65,040	120,119	56,900	108,631	-6.9%	-8.7%	-12.5%	-9.6%
89	GQ	63,331	120,063	60,073	120,087	56,439	118,216	-10.9%	-1.5%	-6.0%	-1.6%
90	Country Homes and Interiors	52,575	90,163	53,537	90,243	55,934	92,563	6.4%	2.7%	4.5%	2.6%
91	Sparkle World	63,213	67,646	57,042	65,457	55,885	65,281	-11.6%	-3.5%	-2.0%	-0.3%
92	Hair Ideas	56,910	62,289	56,638	62,679	55,465	60,111	-2.5%	-3.5%	-2.1%	-4.1%
93	Cbeebies Weekly	52,970	54,846	52,738	54,345	54,813	56,644	3.5%	3.3%	3.9%	4.2%
94	Good Homes	45,528	70,108	39,610	60,395	53,806	73,444	18.2%	4.8%	35.8%	21.6%
95	Barbie	53,795	54,083	49,793	50,017	52,815	53,013	-1.8%	-2.0%	6.1%	6.0%
96	Style at Home					52,576	52,576				
97	Zoo	75,346	80,026	64,211	68,610	50,465	54,318	-33.0%	-32.1%	-21.4%	-20.8%
98	Fancy Magazine					50,047	50,047				
99	Living etc	53,074	92,685	51,994	96,510	49,809	97,098	-6.2%	4.8%	-4.2%	0.6%
100	Spirit & Destiny	52,5									



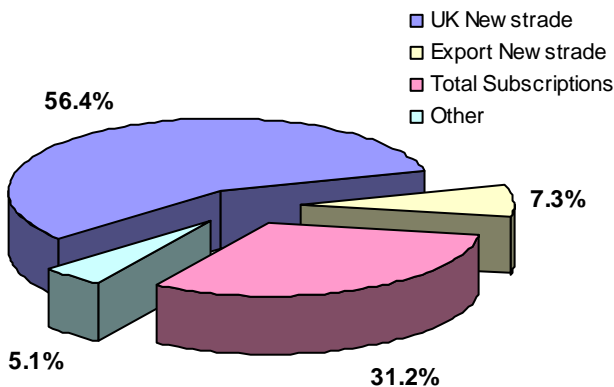
Total ABC Breakdown

JJ11 vs JJ10 ABC Market Performance

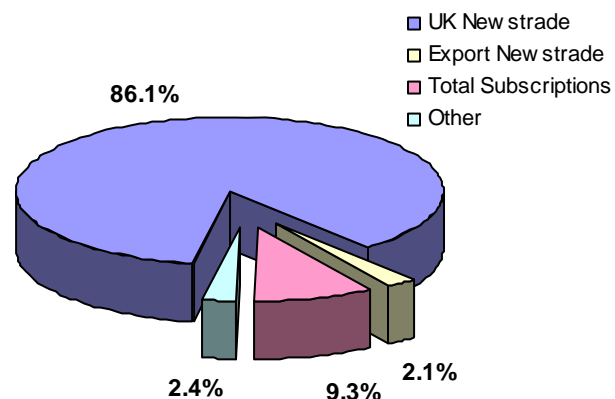


- ▶ The first six months of 2011 saw a total ABC circulation of **480.4 million**, a drop of **(6.2%)** YoY. This was an identical decline to the UK newstrade element. 'Other' distribution methods, such as bulk and free copies, experienced the greatest YoY decline of **(15.0%)**. Subscriptions reported the smallest YoY fall of **(1.9%)**.
- ▶ **80.9%** of the total ABC market in JJ11 comprised of UK newstrade sales, the same proportion as a year ago. Subscriptions was the only sales channel to increase its share, gaining **0.6%** points YoY to account for **13.2%** for the market.
- ▶ The relationship between UK newstrade, export newstrade, total subscriptions and 'other' distribution varies by frequency and is detailed in the charts below.
- ▶ In JJ11 the UK newstrade's share of the monthly market fell by **(2.5%)** points YoY to **56.4%**, with export's share remaining virtually unchanged. Monthly subscriptions and 'other' distribution methods grew their share by **1.4%** points and **1.1%** points YoY respectively.
- ▶ In the weeklies market, the UK newstrade channel dominates even more with a JJ11 market share of **86.1%**, an increase of **0.5%** points YoY. Weekly subscriptions, the second biggest sales channel, grew its share of overall weeklies volume by **0.4%** points YoY to reach **9.3%**.

ABC BREAKDOWN MONTHLIES - JJ11



ABC BREAKDOWN WEEKLIES - JJ11



Subs & Export Summary

Subscriptions

In the JJ11 period **63.3 million** subscription copies were sold, demonstrating a YoY decrease of **(1.9%)**. Subscriptions' share of the total ABC market now stands at **13.2%**, representing an increase of **0.6%** points.

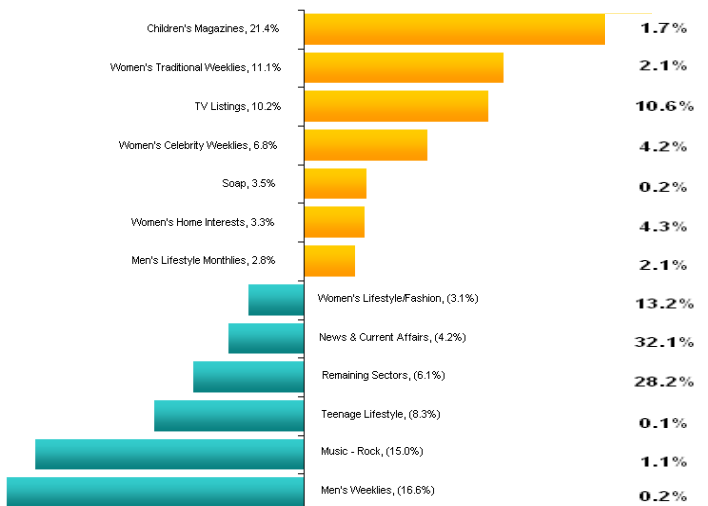
Monthly frequency titles have maintained their share of the subscriptions market, with the split now standing at **58%** to **42%** in the weeklies' favour.

The **News & Current Affairs** sector continues to dominate the market, however elsewhere the **TV Weeklies** sector has performed well and now represents **10.6%** of ABC subscriptions.

IPC's *TV Times* and *TV & Satellite Week* have both enjoyed double-digit YoY increases of **20.6%** and **10.6%** respectively. A number of titles have increased YoY within the **Fashion & Lifestyle** sector, notably *Essentials* which records **35.0%** YoY growth and *Woman & Home*, that has seen **8.1%** growth YoY. *Elle Decoration*, within the **Women's Home Interest** sector, and *The Beano*, in the **Children's Magazines** sector, have also performed very well.

Subscription Newstrade YoY Performance

Vol Share



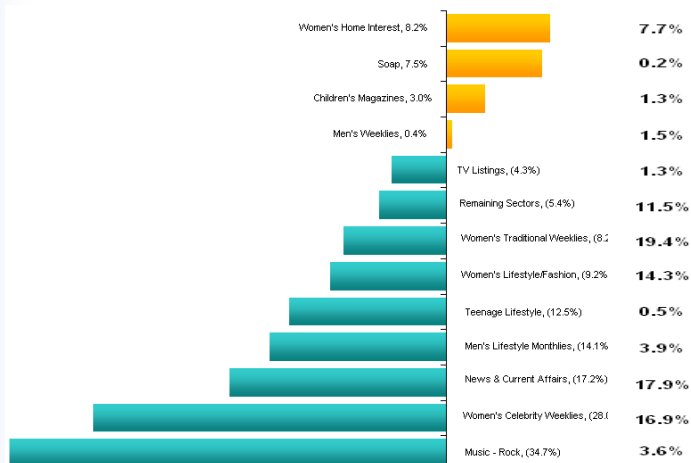
Export

14.5 million copies were sold through the export channel in JJ11, which represents a decline of **(13.9%)** YoY. Export's share of the total ABC market declined by **(0.3%)** points to stand at **3.0%**.

Within the export market, monthlies have seen an increase in market share gaining **3.7%** points YoY versus the weeklies (including fortnightlies). Sales of monthly titles equate to **42.5%** of the JJ11 export market versus **57.5%** for the weeklies.

Export Newstrade YoY Performance

Vol Share



A number of sectors have exhibited growth, with the **Women's Home Interest** particularly strong at **8.2%** YoY. **Soap**, **Children's Magazines** and **Men's Weeklies** sectors have also demonstrated growth.

Within the **Children's Magazines** sector D.C.Thomson's *The Beano MAX* was up **30.1%** YoY, while within the **Home Interest** sector both *Living etc* and *Ideal Home* show impressive increases of **36.9%** and **23.4%** YoY. *Red* is the best performing Women's Fashion/Lifestyle title, growing its average export volume **29.8%** YoY to just under **10,000** copies.

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