

# ABC Market Summary Report

January – June 2018



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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 and digital. The **Total ABC** column quoted in the data table on page 5, however, does include sales from every channel.

For the **Total Market**, **Export**, **Digital** 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

The UK newstrade ABC market was worth **£266.6m** in JJ18 down **(6.7%)** YoY. This equates to copy sales of **178.3m**, down **(10.4%)** YoY. **10.0%** of copies sold were discounted in JJ18, down from the previous year and accounting for **5.8 million** fewer in total. The **Home Improvement** sector saw the greatest YoY volume growth, up **0.8%**.

## Women's Celebrity Weeklies

In JJ18 the **Women's Celebrity Weeklies** sector generated **£45.9m** in revenue, down **(10.8%)** YoY. The top performing title was *HELLO!*, posting a UK newstrade figure of **167,904** and overtaking previous top title *Closer*. It was also the only title to record sales growth both PoP and YoY by **4.6%** and **6.8%** respectively. Discounted copies sold in the sector dropped to **39.6%**, a decrease of **(3.9%)** points.

## Women's Traditional Weeklies

The **Women's Traditional Weeklies** sector was worth **£53.2m** in JJ18 down **(7.4%)** YoY. Eight of the titles outperformed the sector in YoY volume and revenue. *Take a Break* continued to lead the sector recording a UK newstrade of **466,194** despite seeing both PoP and YoY declines of **(4.9%)** and **(8.3%)** respectively. *Bella* moved up two places, now sitting in fifth place and was the only title to experience both PoP and YoY growth.

## TV Weeklies

*TV Choice* remains top of the sector, recording a UK newstrade figure of **1,167,012**. The second largest title, *What's on TV*, posted a UK newstrade figure of **828,649**. This equates to **£538.6k** in revenue, up **1.7%** YoY and outperforming *TV Choice*. The **TV Weeklies** sector was worth **£65.2m** in JJ18, down **(1.3%)** YoY outperforming the total market by **5.4%** points. The top two titles account for **77.4%** of UK newsstand sales in the **TV Weeklies** sector.

## Women's Fashion / Lifestyle

In JJ18, **Women's Lifestyle and Fashion** posted a UK newstrade revenue figure of **£23.0m**, down **(8.4%)** YoY. This was impacted by *Glamour* decreasing frequency and not releasing an ABC figure. *Cosmopolitan* remained sector leader, up **35.1%** in revenue due to it doubling in price in JJ18. *Red*, the best performer, was the only title to post growth both PoP and YoY. *HELLO! Fashion Monthly* performed well, recording a **10.1%** increase in revenue YoY.

## Children's Magazines

This sector was worth **£37.2m** in JJ18 equating to copy sales of **10.3m**. The top title in the sector was *Peppa Pig Bag-o-Fun* posting a UK newstrade figure of **80,809** and up **11.1%** YoY. This title has overtaken *LEGO Ninjago* which was down **(17.1%)** YoY, recording a UK newstrade figure of **69,371**. Overall **17** of the **32** titles were in PoP revenue growth including *The Beano* which was up **7.5%**.

## Women's Home Interest

**Home Interest – Mainstream** was the biggest sub-sector in JJ18 selling almost **2.0m** copies, down **(18.5%)** YoY. Again, *Ideal Home* was the top performing title posting a UK newstrade of **89,716**, down **(3.4%)** PoP. *Country Living* moved up one rank now sitting in third place ahead of *Style At Home*. *Elle Decoration* was the strongest performer in this period up **1.7%** and **8.5%** PoP in sales and revenue.

## News & Current Affairs

The **News & Current Affairs** sector was down **(15.2%)** in sales and **(2.0%)** in revenue YoY in JJ18. The revenue performance was due to *The Economist* generating an additional **£57.0k** in JJ18 compared to the previous year. *Private Eye* remains top of the sector posting a UK newstrade figure of **82,315**.

## Other Highlights

The **Home Improvement** sector posted both UK newstrade sales and revenue growth of **0.8%** and **5.6%** respectively. This growth was driven by the performance of *BBC Gardeners World*, up **83.0%** PoP and **13.2%** YoY in revenue.



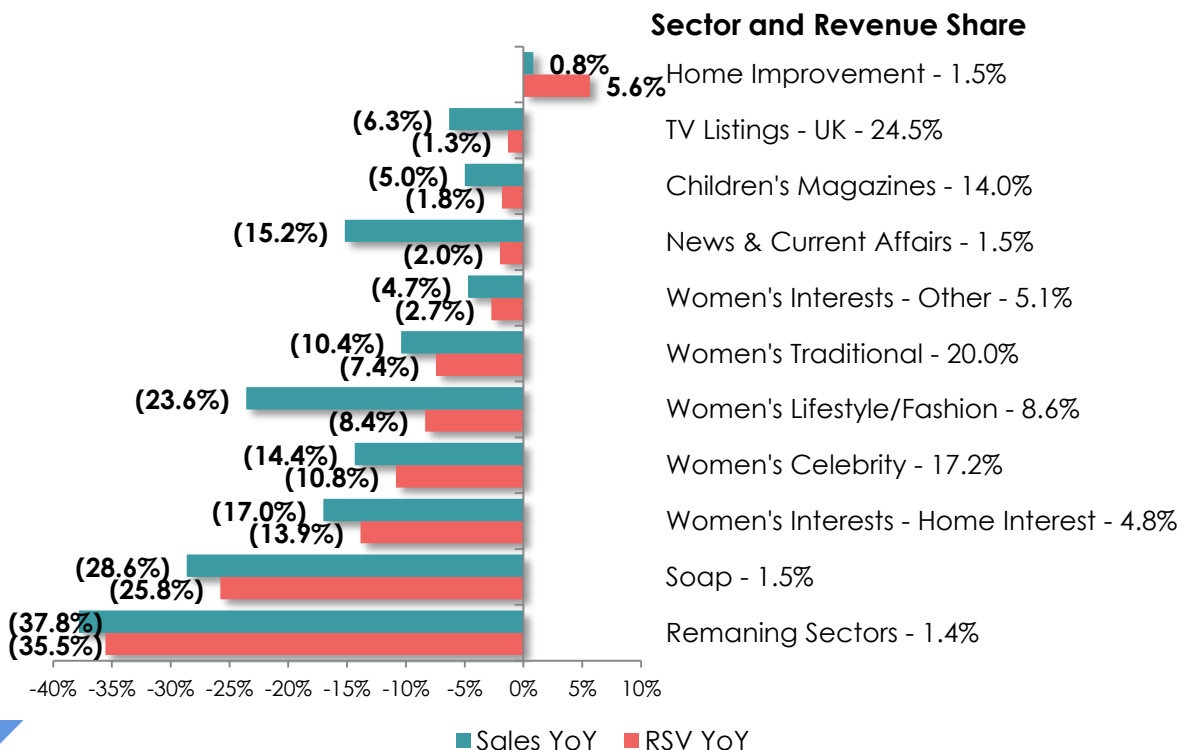
# Market Sector Overview

For **Newspapers and Periodicals**, the 12 month Consumer Price Index (CPI) in June 2018 stood at **116.1** – a **6.1%** increase from June 2017. This has been driven by a number of cover price rises in the market. The inflation rate from July 2017 to June 2018 is higher than the previous 12 months, which had a CPI rate of **4.9%**. In June 2018, the overall CPI index stood at **105.8** – a **2.4%** increase from June 2017. Inflation over this period increased at a marginally slower rate than that of the previous 12 months (July 2016 to June 2017) which was at **2.6%**. The leading contributor to the increased CPI index this year is Transport, caused by rising petrol prices. The effect however, was partially offset by the clothing and footwear sector, particularly men's clothing.

When comparing GDP growth in Q1 2018 at **0.3%** with Q1 2017 at **0.8%**, we see a continuing pattern of slowing growth, in part reflecting a downturn of consumer-facing industries such as retail trade and recreation. Retail trade had fallen by **(0.3%)** in Q1 2018, caused by a decline in petrol sales and adverse weather conditions keeping shoppers indoors. However, GDP growth is estimated to have increased by **0.4%** between Q1 and Q2 this year, with Q2 reflecting a pick up in the service industry, particularly wholesale and retail trade.

**General Interest** and **Teenage Magazine** sectors saw the greatest revenue decline, down **(46.7%)** to **£772k** and **(42.1%)** to **£1.2 million** respectively. The strongest performing sector in JJ18 was **Home Improvement**. Revenue increased by **5.6%** to **£4.1 million**, with its share of the total revenue being **1.5%**. **TV Listings** along with **Children's Magazines** were the next best performing sectors. While both sectors were in decline, they both outperformed the market and made up **24.5%** and **14.0%** market share respectively.

**TV Listings** experienced a **(1.3%)** decline in revenue coupled with a **(6.3%)** decline in volume sales. While **Children's Magazines** saw a YoY decline of **(1.8%)** for revenue and **(5.0%)** volume sales.





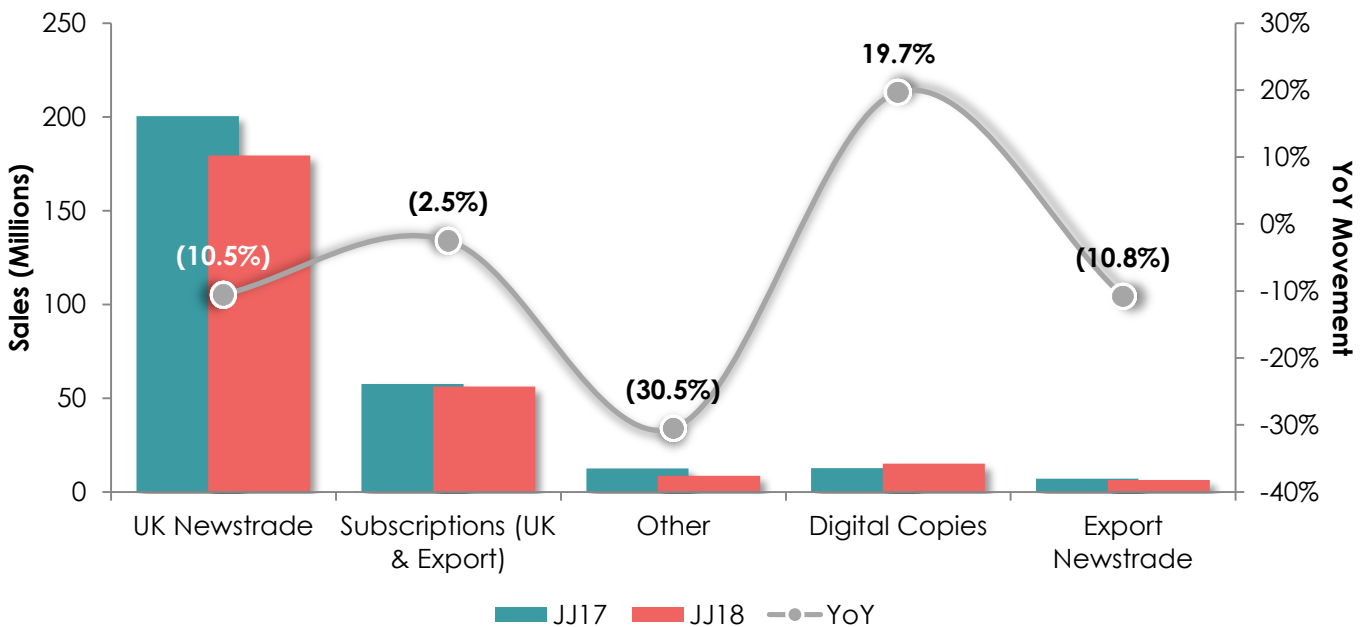
# Total ABC Breakdown

Between January and June 2018, over **3,100** titles were published. **108** of these submitted an ABC (where UK newstrade is more than **20%** of total ABC), down from **119** titles in JJ17. ABC titles account for **83.8%** of volume and **61.8%** of value in the total market. The high percentage share, when compared to the share of titles, reflects the mass market nature of ABC audited magazines. The disparity between share of volume and value reflects the low priced, high volume characteristics of these titles.

Year on year volume sales are broadly in line between ABC and the total market, however UK newstrade sales are down **(10.4%)** which is a greater drop than the **(8.7%)** seen by the total market. This is a reflection of a number of factors:

- **Puzzle Magazines** have seen the best YoY performance in the total market. However as titles don't carry advertising, none released an ABC in this period.
- The **Home Improvement** sector also outperformed the total market which is reflected in the ABC results. Only **3** titles released an ABC figure out of **41** in the total market.
- Some publishers have not audited all their titles with ABC.

## JJ18 vs JJ17 ABC Market Performance



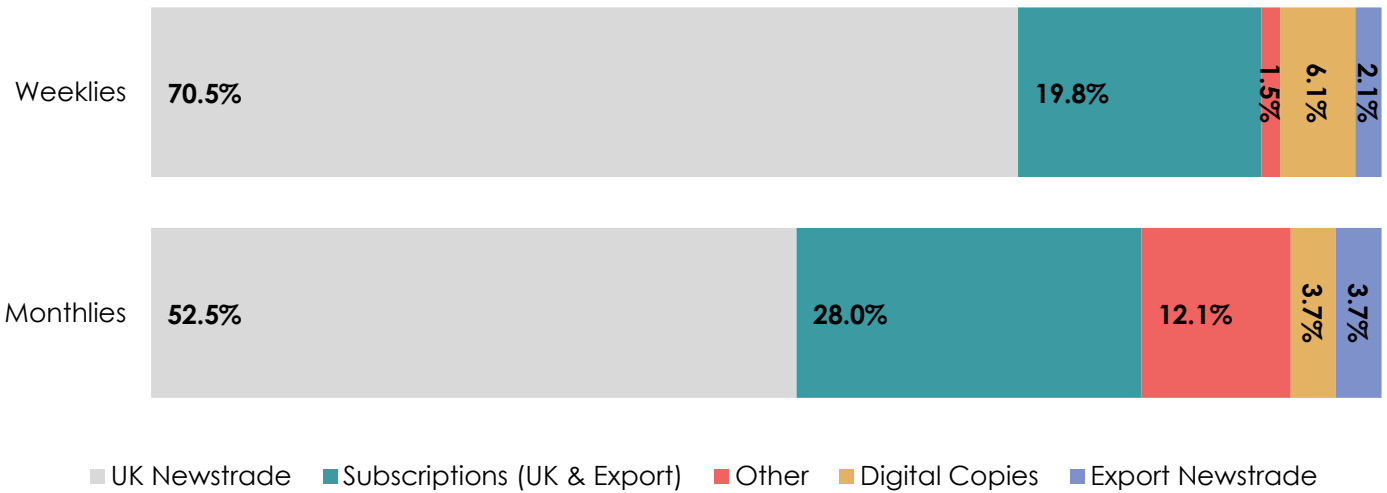
Combined total ABC circulation stands at **265.9 million** for JJ18, down **(8.5%)** YoY. UK newstrade volume, including titles where their UK newstrade is less than **20%** of their combined total ABC, is down **(10.5%)** YoY to **179.4 million**. Subscriptions reported a YoY decline of **(2.5%)** while digital copies reported a substantial YoY increase of **19.7%**, due to more titles being reported by some publishers. Digital accounted for **5.7%** of the JJ18 combined total ABC, a share increase of **1.3%** points YoY. The 'Other' ABC categories collectively experienced a YoY decrease of **(30.5%)**. UK newstrade share of the total ABC market stood at **67.5%** in JJ18, down **(1.6%)** points YoY. Subscriptions share increased **1.3%** points YoY to **21.2%**, while export newstrade share has decreased **(0.1%)** points YoY to **2.4%**.



# Total ABC Breakdown

## JJ18 vs JJ17 ABC Market Performance

In JJ18 UK newstrade saw their share of weeklies decrease by **(1.4%)** points to **70.5%**. UK newstrade's share of monthly magazines decreased by **(2.9%)** points to **52.5%**. The weeklies Total Subscriptions market saw a YoY share increase of **1.3%** points to **19.8%**, while the monthlies Total Subscriptions market share for JJ18 stood at **28.0%**, up **1.8%** points. The Export newstrade share of monthlies declined **(0.1%)** points to **3.7%**, while the weeklies share remained consistent at **2.1%**.



# Subscriptions Summary

In JJ18, **56.2 million** subscription copies were sold, a decrease of **(2.5%)** compared to JJ17.

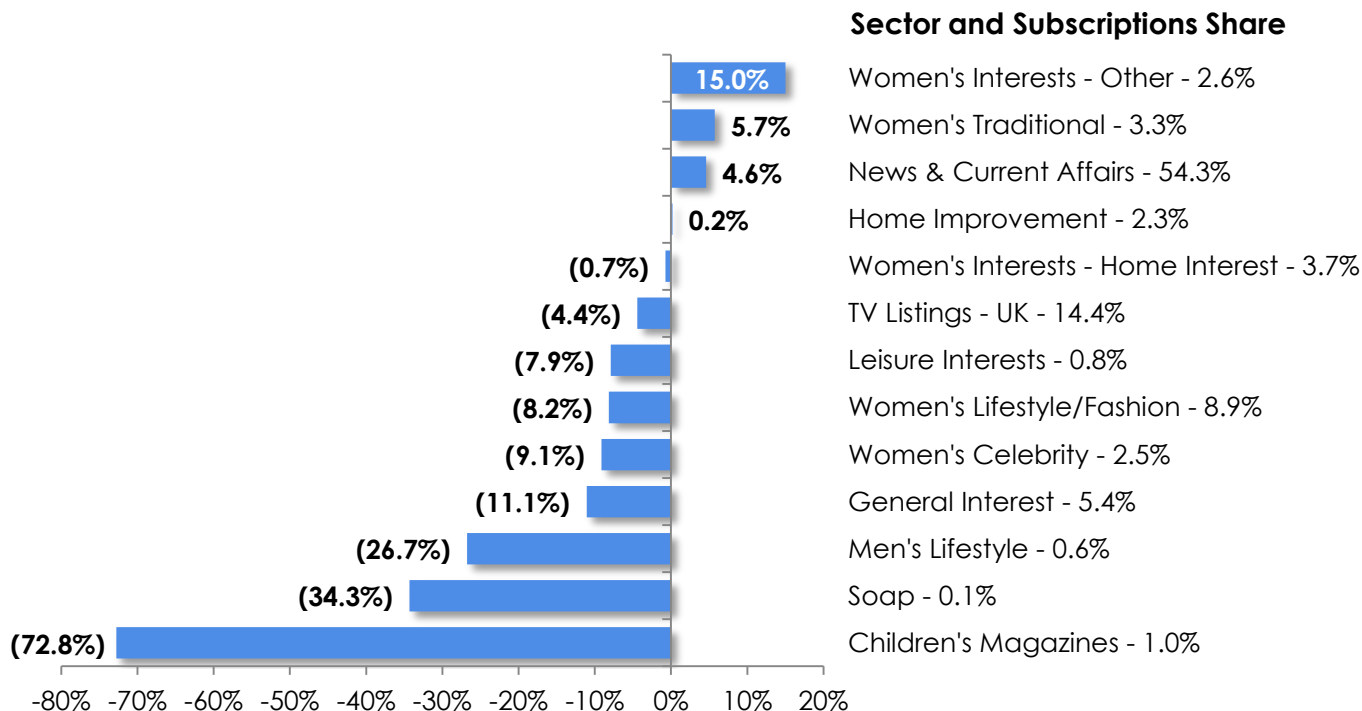
**Women's Interests – Other** is the best performing sector recording **15.0%** YoY growth, increasing its share of the Subscriptions market by **0.4%** points to **2.6%**. *BBC Good Food* is the leading title with **729,729** subscription sales, a **24.9%** increase YoY. *Slimming World* had a significant increase in its subscriptions, up **416.4%** YoY to **196,482**.

Subscriptions for **Children's Magazines** saw a large decline of **(72.8%)** with only **The Beano** registering subscriptions.

Subscriptions in the **TV Listings** sector recorded a **(4.4%)** decrease YoY to **8.1 million** copies, down from **8.5 million** copies in JJ17.

**News & Current Affairs**, the largest sector in the total ABC subscriptions market with **30.5 million** copies, has seen a **4.6%** increase YoY. This is led by *The Economist – North America* edition with **13.0 million** subscriptions. Subscriptions for *The Week Junior* increased by **185.4%** YoY to **1.4 million**.

The **5.7%** YoY increase in the **Women's Traditional** sector was driven by the growth across the three largest titles: *People's Friend*, *Woman's Weekly* and *My Weekly*. *People's Friend* and *Woman's Weekly* account for **45.7%** and **31.5%** of the sector respectively.





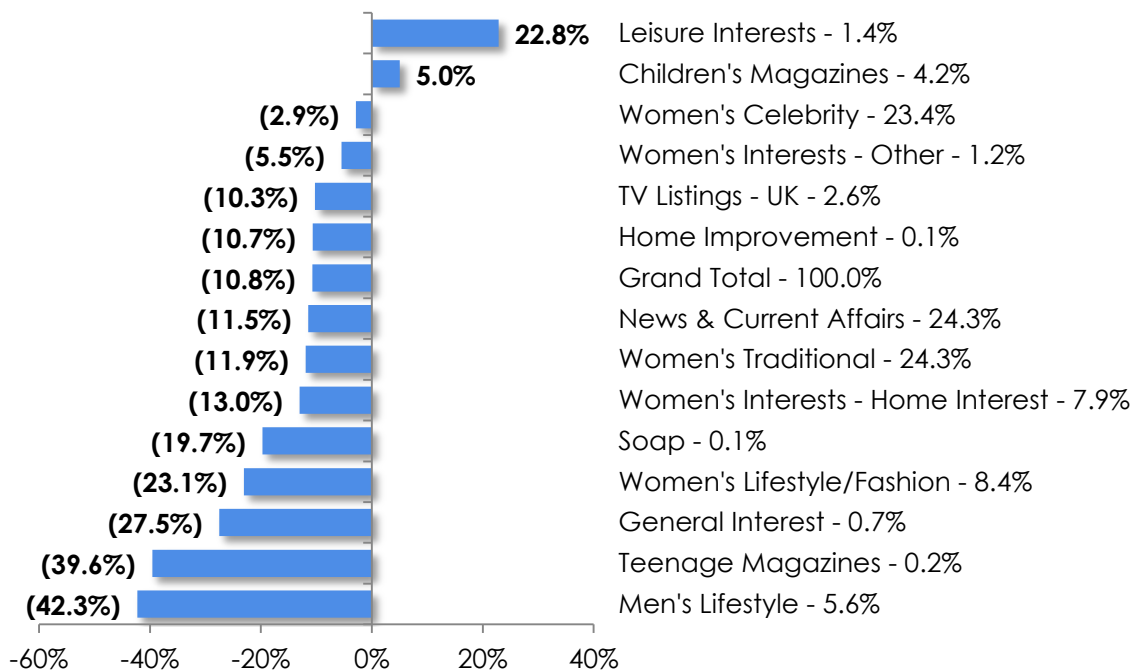
# Export Summary

In JJ18, Export newstrade accounted for **2.4%** of the total ABC market, down **(0.1%)** PoP. A total of **6.4 million** export newstrade copies were sold, a YoY decline of **(10.8%)**.

The weeklies have outperformed the monthlies, as they did in the previous year, recording year on year declines of **(9.4%)** and **(14.5%)** respectively. The weeklies have increased their share of Export newstrade to **74.2%**, a movement of **1.1%** points.

*HELLO!* increased its dominance as the biggest selling export title in the period, with a share of **16.6%**. *HELLO!*, *Monocle* and *Harpers Bazaar* have all recorded YoY growth at **10.6%**, **5.3%** and **92.8%** respectively.

## Sector and Export Share



**Leisure Interests** was the best performing sector year on year, up **22.8%**. The sector now has a **1.4%** share of total export newstrade, which is a **0.4%** point increase YoY. **Leisure Interests'** export newstrade sales accounts for **7.5%** of its total combined ABC.

The **News & Current Affairs** and **Women's Traditional** sectors continue to be the largest in export. Both sectors have a **24.3%** share of export newstrade.

**Children's Magazines** increased sales by **5.0%** in export YoY. This growth is driven by titles including *Sparkle World*, *Fun to Learn-Friends*, and *Peppa Pig Bag-o-Fun*, which increased **29.1%**, **1.6%** and **8.2%** YoY respectively.



# Contact Details

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