



curious minds for surprising results

UK Magazine ABC Review

January-June 2009

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Weeklies report declines across most sectors

Overall Market: -2% POP

Aggressive price promotions and increased TV investment are standard marketing tactics used to buoy figures in this hugely competitive market. Increasingly publishers such as Bauer and Northern and Shell are using the breadth of their portfolios to help drive circulation in the form of multipack offers.

HIGHS

OK! Magazine is back in the number one spot in celebrity market (**+18% pop**). The "Jade effect", heavy TV investment and multi pack promotions across other Northern and Shell titles have all helped OK! recoup circulation lost in the previous ABC result. Taking a closer look, the bumper sales of Jade Goody issues show huge circulation spikes which have greatly buoyed the overall circulation figures.

LOWS

Now Magazine posted dismal results (**-11% pop**). IPC's celebrity flagship title is hoping to win back readers through its recent re-design delivering a more upbeat take on celebrity news and increased fashion coverage.



Celebrity

- The right editorial mix and heavy cut pricing pays off for **Reveal (+17% pop)**
- Heat Magazine's editorial stance continues to show signs of fatigue despite Bauer's multipack offers with **Closer (-5% pop)**
- **Hello** magazine suffers its biggest decline, driven mainly by the lack of top-end celebrity exclusives that usually help spike circulations (**-6% pop**)

Fashion

- **Look's** unique High Street shopping coverage continues to hit the right note in these times (**static pop**)
- Once again, up market weekly **Grazia** delivers a winning formula for fashion savvy women (**1% pop**)

Real Life

- This sector is heavily driven by cover price promotions and **Love It!** continues to flounder (**-9% pop**)
- **Pick Me Up** circulation tumbles (**-14% pop**) as its real life stories became too hard hitting for its readers

Classic

- Previous signs of recovery for IPC's **Woman (-5% pop)** and **Woman's Own (-6% pop)** fall short as IPC cuts marketing investment in both titles
- Having dabbled with celebrity positioning, **Bella** is finally showing signs of recovery as it goes back to its classic roots (**+9% pop**)

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Mostly grim results across the women's monthly market

Overall Market: **-3% POP**

The first reporting period to show the change in ABC rules was always going to be a challenge for the monthlies (all 2 for 1 value packs no longer count towards total circulation). Publishers have sought other ways of maintaining numbers and most have upped the ante with premium cover mounts. Across the board, Q1 copy sales slumped as the recession kicked in.

HIGHS

Instyle has finally found its feet in the UK market and the title is one of the few to post a positive result (**+1% pop**). The editorial hits the right balance of celebrity, fashion and beauty and the title has dramatically improved its art direction.



LOWS

Marie Claire will be pleased that the September Issue re-launch has been so well received given its latest drop in circulation (**-9% pop**). The decision to run Bruno on the July cover shows how much the magazine has lost its way during this ABC period. Ex-Red editor Trish Halpin has injected new franchises into the magazine's tired format.



Lifestyle

- *Glamour* (**-4% pop**) struggles despite premium cover-mounts (Benefit Mascara £9.50) and price cut promotions (£1 June issue)
- *Cosmopolitan* exercises damage limitation by continuing to offer £2 cover price promotions and multi packs with *She* (**-2% pop**)
- *Company* suffers at hands of younger women's weeklies such as *Look* and *More* (**-4% pop**)
- *Elle's* static result is positive (**static pop**) given that the title reduced its cover-mounts and added value to readers mainly through editorial supplements. This was also aided by a *Red* magazine multipack.

Luxury and Fashion

- *Vogue* (**-5% pop**) does not rely on cover mounts to help buoy figures, so in tough times the title is always going to be exposed on newsstand. *Vogue* will however, be bitterly disappointed with its first significant decrease in 7 years. Conde Nast claim that *Vogue's* circulation always fluctuates around 200,000 mark but there is no hiding from such a marked drop after so many positive results.
- *Bazaar* (**static pop**) leads the pack in terms of innovation: the *W magazine issue size* (US Fashion title) for March was celebrated by advertisers and has been repeated in the other core Fashion month (September issue), although rumours abound that the issue did not perform so well on newsstand. It is also worth noting that *Bazaar* offered multipacks with *Hello* and *Country Living* which greatly helped results.
- Ex- *ES Magazine* editor Catherine Ostler manages to curb the decline on *Tatler* (**+1% pop**) and *Vanity Fair* holds up (**+1% pop**)

Middle Youth

- *Red* leads the way in the 30 something women sector and the title normally strikes the right chord with its mix of lifestyle and fashion. Hachette will therefore not be pleased with the latest figures (**-3% pop**).
- Results are grim elsewhere in the market - *She* loses more ground (**-9% pop**), a particularly poor result, especially as *She* ran a multipack with sister title *Cosmopolitan*
- Having enjoyed continuous growth since launch, *Psychologies* (**-7% pop**) posts its first decrease. This result is borne mainly out of the niche title maturing rather a need for radical editorial change but concerns will grow if the next result shows decline.
- *Woman and Home* continues to hit the mark with some strong front covers and holds steady in a declining sector (**+0.8% pop**)
- *Good Housekeeping's* new editor Lindsay Nicholson has only worked on 3 of the issues audited (**-4% pop**) so The National Magazine Company are hoping improvements should be evident in the next ABC results.

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Doom and gloom in turbulent Men's Market

Overall Market: -15% POP

With *Maxim* and *Arena* now out the game, the men's market continues to show the strain in the latest ABC results.

HIGHS

Men's Health sees its 15th consecutive ABC increase (**+0.1% pop**) and now becomes the biggest selling men's monthly, a phenomenal result considering the state of the rest of the market. With men increasingly health and body conscious, *Men's Health* continues to give health advice whilst also covering more lifestyle features.



LOWS

The younger men's weeklies are in freefall with *Nuts* (**-19% pop**) and *Zoo* (**-24% pop**) markedly down. Given the lack of price promotions over the last 6 months *Nut's* result is slightly better. Whilst the results are dismal, *Nuts* still circulates 519,101 more copies than *FHM* on a monthly basis, showing that there is still a market for the men's weeklies.



- As more young men go online, unique content in magazines is critical in retaining readers. *Loaded* fails to hit the spot and continues to haemorrhage circulation (**-19% pop**).
- It is hard to believe that *FHM* now circulates only 235,027 copies given the lofty numbers the former number one men's monthly delivered in its glory days (circa 750,000 copies). Although the market has fragmented and moved on, the latest attempt to take the title more up market simply has not worked (**-14% pop**). New *FHM* editor Colin Kennedy has a real job on his hands to revive its fortunes and plans are afoot for themed issues (music, sport etc) and the re-launch of *FHM Collections* to stand alongside *FHM Bionic*.
- Esquire* cannot maintain it's last impressive result, and sees a disappointing decrease (**-12% pop**), proof that subscription offers alone cannot lift circulation. Newsstand sales were down and moving forward, the title is looking at special issues including hardback covers.
- Surprisingly, *GQ* has fallen foul, losing 10,075 copies off its headline figure (**-8% pop**). Conde Nast attributes this to a loss of sales at key travel points as the recession bites but this is the first decrease golden title *GQ* has seen for some time.
- Free magazine *Shortlist* is spared the spotlight of the newsstand and sees another slight increase (**+1% pop**) due to apparent improved efficiencies in distribution; London now has fewer distributors but in more effective locations.

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Film titles stand firm whilst Music titles slip again

Overall Market: -12% POP

Most of the music titles continue to show downward trends but the film market continues to hold steady with *Empire* going from strength to strength

HIGHS

Guest editor Steven Spielberg helped *Empire* deliver its 7th consecutive ABC increase with a **(+2% pop)**. The issue included big name exclusives with stars such as Jack Nicholson, Arnold Schwarzenegger, Tom Cruise and Mel Gibson. Big budget movie blockbusters such as *Transformers 2*, *Terminator 4* and *The Watchmen* will all have also contributed to the strong result.



LOWS

Yet again *NME* sees another disappointing result **(-16% pop)**. Although print continues to suffer, IPC continues to expand the *NME* brand with online, radio and TV all growing its audience.

Q Magazine sees a respectable result with the title down only slightly **(-3% pop)** compared to last period **(-9% pop)**. Once again *Q Magazine* has changed editorial direction, focusing on music and moving away from the lifestyle element it previously championed. Strong covers have also helped including Bruce Springsteen and Noel Gallagher.



- *Mojo* posts a decrease **(-3% pop)** despite its unique editorial policy of getting to the heart and soul of music whether it new, classic or cult
- Although *Kerrang* remains the UK's best selling rock weekly, the lack of rock releases over the last 6 months have affected sales and the title has seen significant circulation decrease **(-17% pop)**. Bauer is relying on the new rock releases in the next 6 months to get the title back on track.
- *Metal Hammer* was also affected **(-9% pop)** even though the title tends to cover the heavier end of the rock scene
- *Total Film* continues to sell almost half of *Empire's* circulation and posts a marginal market decrease **(-1% pop)**

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Lack of ABC results in Gaming market

Overall Market: -5% POP

Lack of results reported due to limited number of titles audited in this period.

HIGHS

Online gaming titles (GamerZines) prove to be the bright spot in this sector posting impressive increases in total monthly download figures for this format (**+13% pop**). *GamerZine MMOZine* shows the most rapid growth (**+23% pop**) reflecting the growing popularity in Massively Multiplayer Online Gaming: a video game which is capable of supporting hundreds of players simultaneously.



LOWS

The big news is that Future Publishing has decided to close *Playstation World* with immediate effect. The Publisher had 3 Playstation titles in its portfolio (*PSM3*, *Official Playstation Magazine* and *Playstation World*) and Future will now focus its efforts on the two most profitable titles.



- Advertisers in this sector have been dealt another blow - market leader Future Publishing has decided to report annual instead of 6 monthly ABC results. Future claims this is simply an attempt to cut costs in the current climate (it costs approx £1,800 for an ABC certificate). As magazine copy sales normally increase in the build up to Xmas period, this decision could also be a strategic move to avoid reporting the standard circulation dips in the first half ABC results.
- Imagine Publishing's *X360* delivers a fantastic result remaining flat (**static pop**) whilst significantly smaller circulating *360* sees a significant drop (**-11% pop**). *X360*'s investment in poly bagging and the addition of a free DVD and book has paid off. Independent title *360Gamer* is down (**-9% pop**) and as the title does not offer added value through cover mounting, it's difficult to see how it will revive its fortunes moving forward.

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The kids market suffers disappointing results

Overall Market: -12% POP

The fickle nature of this market means that Publishers are caught short if they do not constantly look at ways of evolving products.

HIGHS

Following the success of *Ben 10* series on Cartoon Network, the magazine launch is big news for the pre-teen sector with its debut ABC exceeding all expectations and taking the number 3 spot in the pre-teen sector (**70,012**).



LOWS

Dr Who Adventures circulation tumbles (**-31% pop**). Back on air this Christmas the BBC will hope the programme will revive its circulation.



Pre-school

- Titan's *Lazy Town* (**+2% pop**) increases circulation and continues successful school and government partnerships to promote a healthy lifestyle to children
- Increased air time of *Bob the Builder* pays off for the magazine (**+19% pop**), a second generation is introduced to the show

Pre-Teen

- Mixed results for Orange 20: the ever popular *Hanna Montana* remains stable (**-2% pop**), whilst *High School Musical* posts a devastating decline (**-25% pop**), suggesting fans of the show may well have reached saturation point
- *Toxic* circulation increases (**+3% pop**) and the editorial re-design proves successful
- The same cannot be said for Egmont's *Go Girl* (**-24% pop**) kick-starting plans for an editorial re-design
- Following the dismal results of *Girl Talk Extra* (**-38% pop**) the BBC takes the sensible decision to close the magazine. *Girl Talk* also posts a disappointing result (**-18% pop**)
- Elsewhere old time favourites *Beano* (**-13% pop**) and *Dandy* (**-24% pop**) are in freefall suggesting that the publishers' reliance on the heritage of these brands needs addressing.
- *SB SquarePants* has slowed the previous decline to a mere (**-2% pop**) drop in circulation. Increased PR and media coverage for the 10th anniversary helped achieve this result.

Teen

- *Simpsons* (**-5% pop**) continues to be a leading title despite shedding 6,000 copies. Titan has attempted to increase popularity of selected titles with one off issues distributed free in the National press.
- Despite one of the highest cover prices, *Simpsons Presents* increases circulation (**+3% pop**), due to increased pagination giving readers real value for money.
- Even when savvy teens have become more exposed to the ever fragmenting landscape *Top of the Pops* (**-5% pop**), *Bliss* (**-5% pop**), and *Shout* (**-6% pop**) have remained relatively stable

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Car market crashes as recession takes it's toll

Overall Market: -5% POP

The car buying market is down 28%yoy which continues to have devastating effects on this sector.

HIGHS

BBC *Top Gear* (**static pop**) continues to shift its editorial positioning further towards a lifestyle appeal which appears to be paying off in this troublesome market. With a new editor on board, Connor McNicholas, it will be interesting to see if there is a shift in tone over the coming months.



LOWS

Car magazine (**-15% pop**) will be very disappointed with their performance having reported such a strong result last time. Despite multipack offerings with *FHM* and separately *Classic Cars* earlier in the year, the volatility in the market has led to extremely poor sales figures for this period. The title plans to go back to having premium front covers in the hope that this will appeal to consumer's aspirations.



- With a title that is so reliant on consumers buying cars, *What Car?* (**-5% pop**) feels the pinch of the recession. However, there are signs of life with the Government scrappage scheme starting to deliver registrations back to the market.
- Dennis Publishing will also be concerned over *EVO*'s result (**-12% pop**). *Evo* has pinned this poor result purely on the faltering market and seem confident that readers will come back once the car market recovers.
- The weekly car sector is no different and has also suffered in this depressed market with *Auto Express* (**-7% pop**) and *Auto Car* (**-5% pop**) reporting circulation declines.

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A mixed set of results for the Current Affairs Market

Overall Market: +1% POP

Avid interest in the state of the Global Economy, the MP's expenses scandal and ongoing swine flu saga have all helped to maintain numbers in the this market.

- *The Week* goes from strength to strength (**+7% pop**) and becomes the largest weekly subscription title of any category in the UK. Heavy marketing investment including a strong subscription push in National Press pays off.
- *The Economist* sees another solid UK performance (**static pop**). The magazine focuses on quality objective reporting to draw in readers, rather than opting for big name columnists seen elsewhere in the market.
- *The Spectator* sees circulation dip (**-3% pop**) by dropping of the free trials which helped buoy the figures in the last period
- *New Scientist* also reports a decline (**-2% pop**), a disappointing result for a title that has built itself a niche in the market and has no direct competitor
- *Moneyweek* hits the right note in this climate and delivers a great result (**+6% pop**)



Cyclical nature of Food market sees circulations falter

Overall Market: -7% POP

It is no surprise that most titles have lost readers given the seasonal nature of this market. Two launches in this period suggest that despite the current economic climate, food and eating in is still in very much in fashion.

- The BBC will be satisfied with a relatively good result for *Olive* (**-3% pop**) compared to the double digit decreases in *BBC Good Food* (**-10% pop**) and *Easy Cook* (**-17% pop**). Although the magazine reports gloomy results, the *BBC Good Food* brand goes from strength to strength with website traffic up. Live events have been performing well and the Good Food Channel has recently been re-branded to UKTV Food
- *Olive*'s main competitor *Delicious* goes with market trends and also sees a slight dip in sales (**-4% pop**)
- New *Sainsbury's Magazine* editor Helena Lang is hoping to steady the ship following the latest ABC result (**-6% pop**) Forthcoming plans include adopting a slightly younger style and more lifestyle features with food moving to the back half of the magazine.
- Two new titles have been launched into the market, *Jamie*, and *Eat In*. *Jamie* is an online book-a-zine so there will be no figure to report. *Eat In* is published by Bauer and only launched in April. The title has set a monthly target of 31,000 sales so it will be interesting to see where this figure comes in at in the next set of ABC results.





Confidence crisis across the Home sector

Overall Market: -7% POP

Unsurprisingly the homes market has mirrored the property slump with a loss of confidence across the sector. Publishers are seemingly unwilling to invest in titles that will struggle to see a return on investment in the foreseeable future.

HIGHS

Country Living (+2% pop) will be extremely pleased to post a positive result in this gloomy market, especially in light of its last performance. Increased number of *Country Living* shows across the country has provided a strong platform to sell the magazine and brand. A multi pack with *Bazaar* also helped figures.



LOWS

Elle Deco (-7% pop) seems to be suffering worst than most, whilst losing even more ground on their main competitor *Living Etc* (+5% pop). The title plans to soften the tone and become slightly more accessible, whilst retaining its premium feel in the hope of clawing back its readers.



Headlines

- *Grand Designs* TV show continues to have a yo-yo effect on the magazine's circulation. The show is aired from January to April, during which time there is also the GD exhibition, therefore during this period the figures show a healthy looking increase (+6% pop).
- The fact that the BBC sold *Good Homes* (-8% pop) earlier this year to an independent publisher (Kelsey) confirms the lack of confidence in this market. Kelsey plan to reduce the format of the magazine, increase distribution outlets and focus on the title's prominence on shelf in an attempt to halt the slide.
- *Homes & Garden* (-4% pop) and *House & Garden* (-7% pop) poor results go to show that even the more premium /affluent end of the market has been affected by the current recession
- *Ideal Home* (-2% pop) has fared better than its mass market counterpart *House Beautiful* (-7% pop)
- On the surface, *BBC Homes & Antiques* latest result (-28% pop) seems a concern but the main reason for this decline is down to stripping out the bulks, equating to 23% of the drop

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**For further information on the latest ABC report,
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Eve Samuel-Camps

Head of Press – UM
Tel: 0207 073 7220
eve.samuel-camps@umww.com



Nick Heales

Press Director - UM
Tel: 0207 073 7193
nick.heales@umww.com



Martin Donnelly

Press Manager - UM
Tel: 0207 073 7152
martin.donnelly@umww.com



Hugh Collins

Press Executive - UM
Tel: 0207 073 7071
hugh.collins@umww.com



Alex Vale

Press Executive - UM
Tel: 0207 073 7133
alex.vale@umww.com

