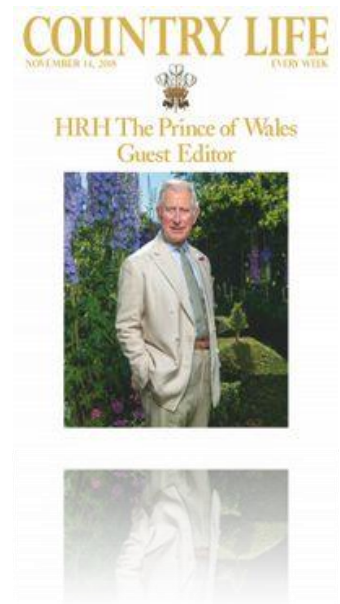


# ABC Market Summary Report

July – December 2018



# Contents

ABC Highlights	3
Market Sector Overview	4
New Launch & Debut ABC Round Up	5
Top 100 UK Newstrade Titles	6
Top 100 Total Combined ABC Titles	7
Total ABC Breakdown	8
Subscriptions Summary	10
Export Summary	11
Contact Details	12

## 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.

Due to a number of magazine closures and titles not releasing in the latest period, constant title performance has also been measured. Titles are defined as constant if they appear in the most recent period, and the corresponding period from the previous year.



# ABC Highlights

The UK ABC newstrade market was worth **£634.2 million** in 2018, down **(9.5%)** YoY. This equates to copy sales of **373.8 million**, down **(11.9%)** YoY. **TV Listings**, **Women's Traditional** and **Women's Celebrity** were the highest selling sectors and **Countryside & Country**, **TV Listings** and **Home Improvement** were the sectors that had the best YoY revenue performance in 2018. The constant performance is showing less of a decline for the UK ABC newstrade for sales and revenue, **(8.2%)** and **(3.7%)** respectively.

## Women's Celebrity Weeklies

In 2018, the **Women's Celebrity Weeklies** sector generated **£85.5m**, down **(13.9%)** YoY. The top performing title was *Closer*, posting a UK newstrade figure of **163,624**, replacing top title *HELLO!* in the previous period. However, *HELLO!* saw the highest UK newstrade revenue uplift of **9.3%** YoY. *Heat* was the only title to post both UK newstrade sales and revenue uplift both PoP and YoY. Discounted copy sales declined to **36.8%**, a YoY drop of **(6.8%)** points.

## Women's Traditional Weeklies

In 2018 the **Women's Traditional Weeklies** sector was worth **£105.3m**, down **(6.4%)** from the previous year. *Take a Break* continued to lead the sector recording the highest UK newstrade figure of **457,541**, despite seeing **(6.7%)** YoY decline. *Bella* and *Love It!* were the only titles to see sales and revenue growth both PoP and YoY. *Woman's Weekly* and *Chat* remained in second and third position, both posting PoP UK newstrade revenue growth of **5.5%** and **2.9%** respectively.

## TV Weeklies

The **TV Weeklies** sector generated **£138.0m** in revenue in 2018, down less than **(1.0%)** YoY. Five of the six titles recorded PoP revenue growth in 2018, with *Radio Times* and *Total TV Guide* up **14.8%** and **15.3%** respectively. *TV Choice* and *Total TV Guide* were the only titles to see PoP and YoY revenue growth. *TV Choice* posted a market leading UK newstrade figure of **1,161,116**. *What's on TV* maintained its second position with a **31.6%** share of the sector, posting a UK newstrade sale of **821,557**, up **5.2%** in revenue since last period.

## Women's Fashion / Lifestyle

The **Women's Fashion/Lifestyle** sector sold **16.1m** in 2018, generating **£50.3m**, down just **(2.4%)** YoY. *Good Housekeeping* replaced *Cosmopolitan* as sector leader, posting UK newstrade sales of **172,605**, up **17.0%** PoP. *HELLO! Fashion Monthly* saw the healthiest PoP and YoY revenue uplift of **33.6%** and **23.2%** respectively. *Cosmopolitan* performed the worst, seeing a UK newstrade sales decline of **(18.8%)** PoP and **(42.6%)** YoY. *Red*, *HELLO! Fashion Monthly* and *Elle* were the only titles to see YoY UK newstrade sales uplift.

## Children's Magazines

The **Children's** sector was worth **£67.0m** in 2018 posting a UK newstrade figure of **18.6m** copies. *Peppa Pig Bag-o-Fun* replaced *LEGO Ninjago* as sector leader in JD18, posting a UK newstrade figure of **75,660**, up **0.8%** YoY in both sales and revenue. *Lego Special Series* sold **53,128** copies and saw the biggest YoY sales growth of **20.6%**. *Beano* saw the largest PoP sales growth, up **16.1%**, recording a UK newstrade figure of **18,811**.

## Women's Home Interest

The **Home Interest** market was down **(10.6%)** in value in 2018 generating **£28.3m**. **Home Interest – Mainstream** was the highest selling sub-sector and accounted for over half of UK newstrade sales. *Your Home* remained top of the sector recording a UK newstrade figure of **81,577**. *Ideal Home* followed closely behind recording a UK newstrade figure of **79,549**, outperforming *Your Home* in revenue PoP and YoY. *Country Living* performed particularly well in 2018 up **15.6%** PoP in sales and revenue.

## News & Current Affairs

The **News & Current Affairs** sector sold **3.8m** copies in 2018, down **(16.2%)**. **Science** was the best performing sub-sector in revenue YoY, outperforming the total market. *Private Eye* remained top of the sector posting a UK newstrade figure of **82,139**. *The Economist* saw the greatest PoP growth, up **2.2%** in both sales and revenue, posting a UK newstrade figure of **13,707**. *New Scientist* continued to be the second largest title in the sector posting a UK newstrade figure of **18,003**.

## Other Highlights

**Home Improvement** was the second best performing sector in terms of YoY sales and revenue following **Countryside and Country**. *Country Life* was the best performing title in this sector, down just **(1.3%)** YoY in sales, posting a UK newstrade figure of **13,291**. **Sport** is the third largest, with *Four Four Two* the top performing title in YoY sales, posting a UK newstrade figure of **21,072**. The best performer in the **Railway** sub-sector was *Railway Magazine*, posting a UK newstrade figure of **14,373**.





# Market Sector Overview

For **Newspapers and Periodicals**, the 12-month Consumer Price Index (CPI) in December 2018 stood at **118.7** – a **6.1%** increase from December 2017. This has been driven by a number of cover price rises in the market. The UK's 12-month inflation rate to December 2018 has increased at a slower rate than that of the previous 12-month inflation rate to December 2017, which was at **3.0%**. In December 2018, the UK's CPI index stood at **107.1** – a **2.1%** increase from December 2017.

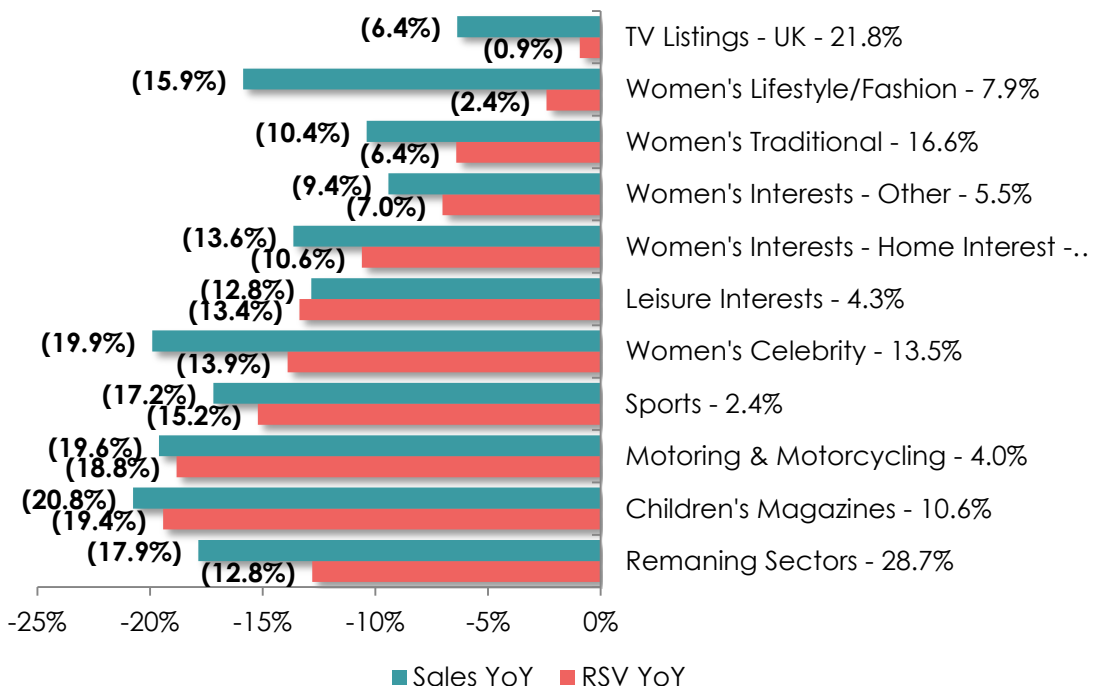
The leading contributors of upward inflation this year have been caused by a rise in domestic fuel prices and from owner occupiers' housing costs. Transport also remains a driving force behind inflation, however the upward contribution to the 12-month rate has reduced as motor fuel prices have fallen. Other prominent rising influencers come from recreation and culture, and from restaurants and hotels. The effect however was partially offset by the clothing and footwear sector.

The UK economy grew by **0.6%** in Q3 2018 and by just **0.2%** in Q4 2018. A strong summer with warm weather and the World Cup drove economic activity in Q3. An initial positive contribution from the services sector in Q4 was offset in December when all major sectors driving the economy (services, production and construction) went into reverse in the wake of low consumer and business confidence. Wholesale and retail trade slowed to **0.5%** in Q4 2018, following growth of **1.2%** in the previous quarter which was boosted by the summer months.

The UK ABC newstrade market was worth **£634.2 million** in 2018, a drop of **(9.5%)** YoY, sales fell **(11.9%)** to **373.8 million** copies. There was a further **£309.6 million** in newstrade revenue in 2018 from non-ABC titles. The **Men's Lifestyle** and **General Interest** sectors saw the greatest revenue decline, down **(25.6%)** to **£5 million** and **(20.2%)** to **£3.1 million** respectively. The only sector showing YoY revenue growth in JD18 was **Countryside & County**.

**Home Improvement** was the second best performing sector YoY with revenue down **(1.0%)** and sales down **(3.3%)**. **TV Listings** and **Women's Traditional** are the two largest sectors accounting for **35.4%** and **27.8%** of sales. Despite showing declines in sales and revenue, both sectors have outperformed the market. **TV Listings** experienced a **(0.9%)** decline in revenue coupled with a **(6.4%)** decline in sales. **Women's Traditional** saw YoY decline of **(6.4%)** for revenue and **(10.4%)** for sales.

## Sector and Revenue Share



# New Launch & Debut Round Up

Title	Publisher	Sector	Sub-sector	UK Newstrade	Total
Hatchimals	Immediate Media Company	Children's Magazines	Primary - Girls	42,230	42,230
Simply You	Bauer Media	Women's Interests	Women's Weeklies	35,512	35,574
Activity Series	Immediate Media Company	Children's Magazines	Pre-Teen - General	22,043	22,043



On 25<sup>th</sup> July 2018, Immediate Media launched *Hatchimals*, which is based on the must-have-toy sensation - in which secret animals break out of their brightly coloured eggs. The title targets girls aged between four and nine and contains interactive stories, puzzles and activities, encouraging creativity and imaginative play. Each issue includes a free gift including exclusive Hatchimal 'colleggtibles'. Priced at **£3.50** and **£3.99**, the magazine has recorded a UK newstrade figure of **42,230**.

The first issue of Bauer Media's *Simply You* was released on 3<sup>rd</sup> May 2018 with a cover price of **£1.90**; this increased to **£1.99** from the January 2019 issue. It has recorded a UK newstrade figure of **35,512**. Each issue contains inspirational real life stories, practical ideas, hints and advice to be healthier, happier and confident.



Immediate Media posted a debut UK newstrade figure of **22,043** for *Activity Series*. The publication launched on the 27<sup>th</sup> June 2017 with a varied cover price of **£3.99** to **£5.99**. Each issue is an activity book style magazine for children based on other Immediate brands, such as *Girl Talk* or *Andy's Amazing Adventures*. The magazine includes colouring, doodling and journal activities, with stickers, pull-out posters and fun facts.



# Top 100 UK Newstrade Titles

Rank	Title	Jul - Dec 17	Jan - Jun 18	Jul - Dec 18	YoY Change	PoP Change
		UK Newstrade ABC	UK Newstrade ABC	UK Newstrade ABC	UK Newstrade ABC	UK Newstrade ABC
1	TV Choice	1,188,558	1,167,012	1,161,116	-2.3%	-0.5%
2	What's on TV	893,300	828,649	821,557	-8.0%	-0.9%
3	Slimming World Magazine	559,445	536,570	517,041	-7.6%	-3.6%
4	Take a Break	490,457	466,194	457,541	-6.7%	-1.9%
5	Radio Times	359,789	301,591	323,085	-10.2%	7.1%
6	Woman's Weekly	218,373	202,199	195,629	-10.4%	-3.2%
7	Chat	213,877	194,396	194,007	-9.3%	-0.2%
8	That's Life	201,098	189,916	188,793	-6.1%	-0.6%
9	Take a Break Monthly (formerly TAB Series/Special)	207,792	175,276	188,680	-9.2%	7.6%
10	Good Housekeeping	175,898	147,480	172,605	-1.9%	17.0%
11	Bella	162,657	164,942	171,736	5.6%	4.1%
12	Yours	167,618	164,359	164,167	-2.1%	-0.1%
13	Closer	168,438	162,338	163,624	-2.9%	0.8%
14	New!	165,158	155,044	161,212	-2.4%	4.0%
15	HELLO!	160,564	167,904	159,487	-0.7%	-5.0%
16	Woman & Home	152,252	154,239	151,309	-0.6%	-1.9%
17	Cosmopolitan	261,061	184,566	149,806	-42.6%	-18.8%
18	TV Times	163,734	139,272	142,234	-13.1%	2.1%
19	OK! Magazine	141,332	140,315	135,442	-4.2%	-3.5%
20	Woman	162,191	136,192	127,992	-21.1%	-6.0%
21	The People's Friend	132,363	123,743	121,290	-8.4%	-2.0%
22	Woman's Own	148,754	124,511	119,048	-20.0%	-4.4%
23	Sainsbury's Magazine	140,035	108,134	116,680	-16.7%	7.9%
24	Best	122,001	111,965	107,820	-11.6%	-3.7%
25	Real People	117,077	110,522	107,102	-8.5%	-3.1%
26	Heat	98,068	98,803	104,743	6.8%	6.0%
27	Prima	108,667	98,365	102,567	-5.6%	4.3%
28	Pick Me Up	115,999	102,489	97,674	-15.8%	-4.7%
29	Inside Soap	89,681	85,021	88,319	-1.5%	3.9%
30	Love It!	84,296	82,624	87,238	3.5%	5.6%
31	Red	74,860	81,862	85,307	14.0%	4.2%
32	Total TV Guide	87,991	83,888	85,026	-3.4%	1.4%
33	Private Eye	93,765	82,315	82,139	-12.4%	-0.2%
34	Your Home	92,888	87,536	81,577	-12.2%	-6.8%
35	Ideal Home	92,829	89,716	79,549	-14.3%	-11.3%
36	WW Magazine	83,747	79,422	79,012	-5.2%	-0.5%
37	HELLO! Fashion Monthly	75,197	69,335	77,183	2.6%	11.3%
38	Peppa Pig Bag-o-Fun	75,039	80,809	75,660	0.8%	-6.4%
39	My Weekly	80,650	75,730	75,039	-7.0%	-0.9%
40	BBC Good Food	74,169	49,704	74,170	0.0%	49.2%
41	Vogue	79,364	71,649	72,931	-8.1%	1.8%
42	LEGO Ninjago	78,052	69,371	69,778	-10.6%	0.6%
43	Healthy	83,168		68,201	-18.0%	
44	Country Living	63,893	56,861	65,727	2.9%	15.6%
45	TV & Satellite Week	81,139	69,346	65,527	-19.2%	-5.5%
46	Grazia	64,646	62,337	62,108	-3.9%	-0.4%
47	Women's Health	62,905	60,900	58,103	-7.6%	-4.6%
48	Cbeebies Magazine	53,619	50,440	56,201	4.8%	11.4%
49	Fun to Learn - Peppa Pig	56,094	60,246	56,079	0.0%	-6.9%
50	Elle (U.K.)	55,486	50,924	56,028	1.0%	10.0%
51	Lego Special Series	44,071	60,190	53,128	20.6%	-11.7%
52	Ideal Homes Complete Guide to Xmas	58,041		51,894	-10.6%	
53	Cbeebies Special	43,778	51,035	50,071	14.4%	-1.9%
54	Cbeebies Art	51,378	46,008	48,295	-6.0%	5.0%
55	Style at Home	57,711	54,952	48,216	-16.5%	-12.3%
56	Top of the Pops	48,936	48,281	45,092	-7.9%	-6.6%
57	HomeStyle	50,192	42,849	44,426	-11.5%	3.7%
58	Fun to Learn - Friends	44,694	45,126	44,241	-1.0%	-2.0%
59	BBC Gardeners' World	46,402	80,853	43,208	-6.9%	-46.6%
60	Hatchimals			42,230		
61	The Big Issue	45,610		42,090	-7.7%	
62	Andy's Amazing Adventures	39,549	40,430	41,720	5.5%	3.2%
63	Men's Health	55,359	42,954	40,719	-26.4%	-5.2%
64	House Beautiful	47,448	39,092	40,485	-14.7%	3.6%
65	Marie Claire	63,113	47,914	39,898	-36.8%	-16.7%
66	Now	74,618	47,178	39,748	-46.7%	-15.7%
67	Go Girl	35,539	39,380	39,878	11.1%	0.3%
68	25 Beautiful Homes	41,828	37,538	38,975	-6.8%	3.8%
69	Motor Cycle News	43,087		37,604	-12.7%	
70	Homes & Gardens	40,030	40,095	37,002	-7.6%	-7.7%
71	Girl Talk	38,380	42,337	35,961	-6.3%	-15.1%
72	Country Homes and Interiors	38,470	32,820	35,790	-7.0%	9.0%
73	Simply You			35,512		
74	Pokemon	44,186	46,154	35,386	-19.9%	-23.3%
75	Toxic	34,748	34,972	35,190	1.3%	0.6%
76	Psychologies Magazine	35,884		34,023	-5.2%	
77	Fun to Learn - Favourites	35,138	32,424	33,912	-3.5%	4.6%
78	Sparkle World	37,691	34,836	33,784	-10.4%	-3.0%
79	Living etc	35,216	35,510	32,911	-6.5%	-7.3%
80	PJ Masks	39,911	40,020	32,716	-18.0%	-18.3%
81	Empire	43,324		32,710	-24.5%	
82	LEGO Friends	43,877	31,164	32,681	-25.5%	4.9%
83	Toybox	28,905	28,113	32,284	11.7%	14.8%
84	GQ	37,412	30,761	31,949	-14.6%	3.9%
85	What Car?	35,878		30,986	-13.6%	
86	Shout	30,509		29,927	-1.9%	
87	Mega	31,489	31,539	29,477	-6.4%	-6.5%
88	Girl Talk Art	26,072	26,326	29,146	11.8%	2.9%
89	Good Homes Ultimate Christmas	39,779		27,457	-31.0%	
90	House & Garden	26,275	24,011	26,807	2.0%	11.6%
91	delicious	29,544	23,523	26,760	-9.4%	13.8%
92	Computeractive	30,815		26,583	-13.7%	
93	BBC Top Gear Magazine	30,501		26,345	-13.6%	
94	BBC Home Cooking Series	24,386	21,665	26,185	7.4%	20.9%
95	Viz Comic	28,725		25,932	-9.7%	
96	Top Santé Health & Beauty	26,019		24,665	-5.2%	
97	Go Jettlers	29,794	28,015	24,395	-18.1%	-12.9%
98	Modern Gardens	25,544		23,604	-7.6%	
99	Spirit & Destiny	25,395		23,416	-7.8%	
100	Activity Series			22,043		



# Top 100 Total Combined ABC Titles

Rank	Title	Jul - Dec 17 Total Combined ABC	Jan - Jun 18 Total Combined ABC	Jul - Dec 18 Total Combined ABC	YoY Change Total Combined ABC	PoP Change Total Combined ABC
1	The Economist (Worldwide Sales Group)	1,391,671	1,410,667	1,657,795	19.1%	17.5%
2	TV Choice	1,188,558	1,167,012	1,161,116	-2.3%	-0.5%
3	What's on TV	895,925	831,227	824,006	-8.0%	-0.9%
4	Slimming World Magazine	636,706	610,093	588,250	-7.6%	-3.6%
5	Radio Times	631,940	577,087	580,709	-8.1%	0.6%
6	Take a Break!	497,349	472,248	463,495	-6.8%	-1.9%
7	Good Housekeeping	455,552	428,771	451,716	-0.8%	5.4%
8	Woman & Home	289,854	284,467	281,193	-3.0%	-1.2%
9	Saga Magazine	262,164	255,544	246,084	-6.1%	-3.7%
10	Yours	244,754	242,499	242,516	-0.9%	0.0%
11	Cosmopolitan	351,338	302,514	240,351	-31.6%	-20.5%
12	HELLO!	234,655	249,834	237,736	1.3%	-4.8%
13	Woman's Weekly	255,288	240,829	236,429	-7.4%	-1.8%
14	Private Eye	246,628	234,904	233,869	-5.2%	-0.4%
15	Prima	238,753	226,129	227,014	-4.9%	0.4%
16	Chat	222,344	203,014	203,358	-8.5%	0.2%
17	Country Living	190,593	184,156	196,866	3.3%	6.9%
18	BBC Good Food	212,619	169,506	192,692	-9.4%	13.7%
19	Vogue	190,032	192,112	192,152	1.1%	0.0%
20	Take a Break Monthly (formerly TAB Series /Special)	212,560	180,039	191,806	-9.8%	6.5%
21	That's Life	203,031	191,583	190,553	-6.1%	-0.5%
22	Closer	189,577	176,731	178,806	-5.7%	1.2%
23	Red	166,128	171,440	177,122	6.6%	3.3%
24	Bella	164,051	166,166	173,017	5.5%	4.1%
25	BBC Gardeners' World	175,947	208,453	170,174	-3.3%	-18.4%
26	The People's Friend	179,640	172,744	169,357	-5.7%	-2.0%
27	New!	170,887	160,031	166,300	-2.7%	3.9%
28	Elle (U.K.)	168,850	151,763	162,243	-3.9%	6.9%
29	TV Times	180,768	157,193	161,397	-10.7%	2.7%
30	The Week	202,617	177,158	151,236	-25.4%	-14.6%
31	OK! Magazine	165,553	154,544	149,142	-9.9%	-3.5%
32	Sainsbury's Magazine	164,980	139,442	147,984	-10.3%	6.1%
33	Men's Health	175,683	146,047	146,785	-16.4%	0.5%
34	National Geographic Magazine	184,548	160,605	145,335	-22.1%	-9.5%
35	Ideal Home	148,705	148,422	133,758	-10.1%	-9.9%
36	Women's Health	132,728	133,452	133,443	0.6%	0.0%
37	Woman	166,573	140,712	133,103	-20.1%	-5.4%
38	Woman's Own	153,354	129,047	124,187	-19.0%	-3.8%
39	Heat	119,853	118,612	123,948	3.4%	4.5%
40	Marie Claire	157,412	123,854	120,133	-23.7%	-3.0%
41	Harper's Bazaar	115,742	117,414	116,339	0.5%	-0.9%
42	New Scientist - Worldwide Sales Group	120,675		114,245	-5.3%	
43	Best	126,862	117,480	113,429	-10.6%	-3.4%
44	House & Garden	112,049	112,053	112,065	0.0%	0.0%
45	Real People	121,842	115,196	111,872	-8.2%	-2.9%
46	GQ	115,006	110,051	110,063	-4.3%	0.0%
47	The Spectator Group	93,677	102,866	109,268	16.6%	6.2%
48	WW Magazine	101,306	101,886	102,878	1.6%	1.0%
49	Grazia	102,859	102,022	102,585	-0.3%	0.6%
50	Pick Me Up	119,764	105,974	101,179	-15.5%	-4.5%
51	BBC Top Gear Magazine	103,489		100,025	-3.3%	
52	House Beautiful	108,727	98,419	98,997	-8.9%	0.6%
53	Your Home	107,438	102,463	96,147	-10.5%	-6.2%
54	Inside Soap	96,012	91,671	94,673	-1.4%	3.3%
55	BBC History Magazine	94,583		94,628	0.0%	
56	TV & Satellite Week	108,807	97,657	94,046	-13.6%	-3.7%
57	Empire	109,654		93,038	-15.2%	
58	Homes & Gardens	94,734	95,840	92,455	-2.4%	-3.5%
59	Total TV Guide	94,209	90,801	92,427	-1.9%	1.8%
60	My Weekly	96,527	92,044	90,048	-6.7%	-2.2%
61	Love III	84,465	82,624	87,238	3.3%	5.6%
62	Manic	84,268	84,368	84,331	0.1%	0.0%
63	HELLO! Fashion Monthly	80,699	75,888	83,772	3.6%	10.4%
64	Candis	91,262	86,579	81,486	-10.7%	-5.9%
65	Conde Nast Traveller	78,141	80,043	81,002	3.7%	1.2%
66	Peppa Pig Bag-o-Fun	79,399	85,455	80,987	2.0%	-5.2%
67	Tatler	78,082	78,090	79,029	1.2%	1.2%
68	The Big Issue - National (Group)	83,073		78,449	-5.6%	
69	London Review of Books	74,157		75,725	2.1%	
70	Computeractive	78,333		73,513	-6.2%	
71	LEGO Ninjago	79,767	71,079	72,337	-9.3%	1.8%
72	First News	79,362		71,884	-9.4%	
73	The English Home - Group	71,831		71,866	0.0%	
74	Healthy	86,224		71,009	-17.6%	
75	Vanity Fair	72,038	72,044	70,080	-2.7%	-2.7%
76	Elle Decoration	70,565	74,903	68,760	-2.6%	-8.2%
77	Runner's World	73,976		67,469	-8.8%	
78	Livingetc	70,665	69,020	67,016	-5.2%	-2.9%
79	Country Homes and Interiors	70,141	63,338	66,986	-4.5%	5.8%
80	25 Beautiful Homes	68,426	65,179	65,139	-4.8%	-0.1%
81	delicious	67,151	61,732	64,089	-4.6%	3.8%
82	Fun to Learn - Peppa Pig	62,554	66,314	62,053	-0.8%	-6.4%
83	The Week Junior	48,017	59,266	60,542	26.1%	2.2%
84	Style at Home	69,894	66,930	59,658	-14.6%	-10.9%
85	Esquire	62,677	60,456	59,002	-5.9%	-2.4%
86	Mojo	62,779		58,383	-7.0%	
87	Psychologies Magazine	60,073		58,182	-3.1%	
88	The Sunday Times Travel Magazine	61,120	59,063	57,856	-5.3%	-2.0%
89	Classic & Sports Car	60,102		57,122	-5.0%	
90	Motor Cycle News	60,719		56,839	-6.4%	
91	CBeebies Magazine	53,619	50,440	56,201	4.8%	11.4%
92	World Of Interiors	55,085	55,098	55,091	0.0%	0.0%
93	What Car?	55,459		54,404	-1.9%	
94	Ideal Homes Complete Guide to Xmas	61,035		54,239	-11.1%	
95	Lego Special Series	44,071	60,295	53,375	21.1%	-11.5%
96	HomeStyle	58,124	51,649	51,735	-11.0%	0.2%
97	Cbeebies Special	43,778	51,035	50,071	14.4%	-1.9%
98	Wired	50,024		50,028	0.0%	
99	BBC Focus	53,050		50,022	-5.7%	
100	Car	50,811		49,629	-2.3%	



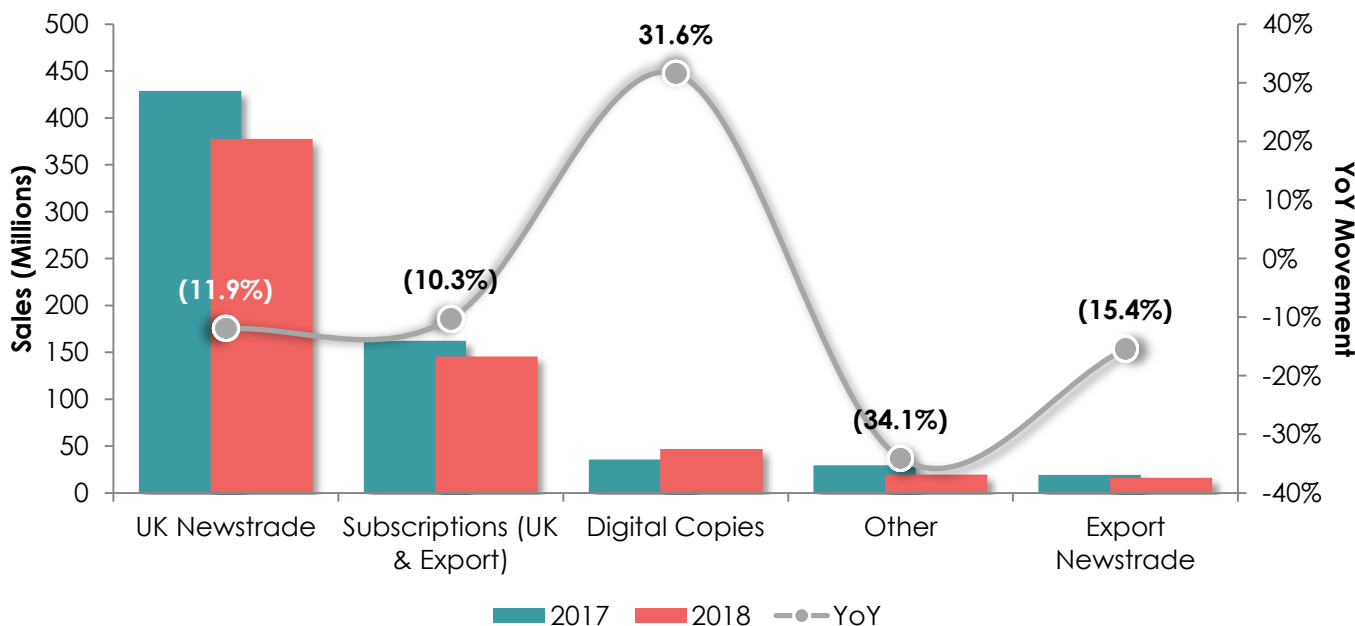
# Total ABC Breakdown

In 2018, over **2,800** regular titles were published. **224** of these submitted an ABC (where UK newstrade is more than **20%** of total ABC). ABC titles account for **86.1%** of volume and **72.8%** 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 **(11.9%)** which is a greater drop than the **(8.9%)** 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 **Women's General Interest** sector also outperformed the total market which isn't reflected in the ABC results. This is due to the new **Mindfulness** titles entering the magazine market.
- Some publishers have not audited all their titles with ABC.

## 2018 vs 2017 ABC Market Performance



Combined total ABC circulation stands at **606.2 million** for 2018, down **(10.3%)** YoY. UK newstrade volume is down **(11.9%)** YoY to **377.5 million**, including titles where their UK newstrade is less than **20%** of their combined total ABC. Subscriptions reported a YoY decline of **(10.3%)** while digital copies reported a substantial YoY increase of **31.6%**. The 'other' ABC categories collectively experienced a YoY decrease of **(34.1%)**. UK newstrade share of the total ABC market stood at **62.3%** in 2018, down **(1.2%)** points YoY. Subscriptions share remained consistent at **24.0%**, while export newstrade share has decreased **(0.2%)** points YoY to **2.7%**.





# Total ABC Breakdown

## 2018 vs 2017 ABC Digital Performance

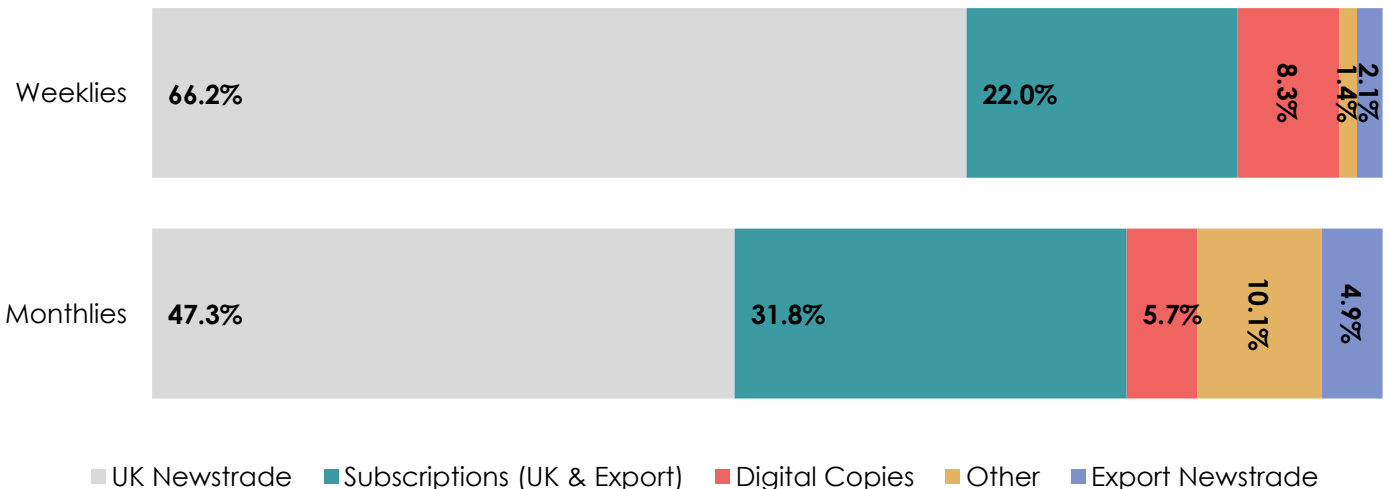
Digital accounted for **7.8%** of the 2018 combined total ABC, a share increase of **2.5%** points YoY. The significant increase in digital is due to *The Economist* selling almost **800k** copies per issue.

**13** out of **21** sectors are showing an improvement in digital sales. The three top selling sectors are **News & Current Affairs**, **Women's Celebrity** and **Motoring & Motorcycling**, these account for **84.6%** of the 2018 digital market. The **Computing** sector is exhibiting a YoY growth of **253%**, while the **Women's Home Interest** is showing a positive growth of **39.6%** YoY.

**145** titles released a digital ABC in 2018, of which **100** titles are showing YoY growth. *The Economist* remains the number one digital edition, selling **790.1k** copies in 2018. This is followed by *New Scientist* and *BBC Good Food* posting digital ABC figures of **15.0k** and **13.3k** respectively.

## 2018 vs 2017 ABC Market Performance

In 2018, UK newstrade saw its share of weeklies decrease by **(0.9%)** points to **66.2%**. UK newstrade's share of monthly magazines decreased by **(2.8%)** points to **47.3%**. The weeklies total subscriptions market saw a YoY share decrease of **(0.3%)** points to **22.0%**, while the monthlies total subscriptions market share for 2018 stood at **31.8%**, up **1.4%** points. The export newstrade share of monthlies remained consistent at **4.9%**, while the weeklies share declined **(0.2%)** points to **2.1%**.



# Subscriptions Summary

In 2018, **145.7 million** subscription copies were sold, a decrease of **(10.3%)** compared to 2017.

**News & Current Affairs**, the largest sector in the total ABC subscriptions market with **66.7 million** copies, has seen an **(11.9%)** decline YoY. The sector's constant title performance is stable YoY. This sector is dominated by *The Economist* with **41.9 million** subscribers. Subscriptions for *The Week Junior* increased by **88.8%** YoY to **2.8 million** and subscriptions of *The Spectator* increased **1.7%** YoY to **2.4 million**.

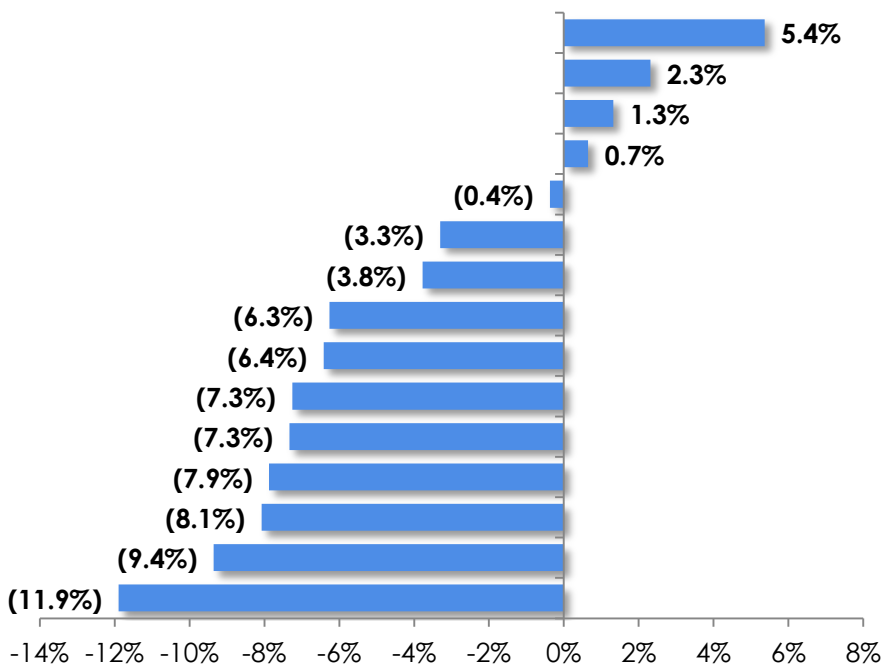
**Women's Traditional** is the best performing sector recording **5.4%** YoY growth, increasing its share of the subscriptions market by **0.4%** points to **2.8%**. *People's Friend* is the leading title at **1.6 million** subscribers and a **1.6%** increase YoY. TI Media titles have performed well and *Woman's Weekly* in particular is the second biggest title and had a significant increase in its subscriptions, up **12.3%** YoY to **1.2 million**.

**Home Improvement** recorded **2.3%** YoY growth increasing its share of the subscriptions market by **0.3%** points to **2.4%**. *Garden Answers* grew its subscriptions, up **22.9%** YoY to **335,736**.

Subscriptions in the **TV Listings** sector recorded a **(3.8%)** decrease YoY to **16.1 million** copies, down from **16.7 million** copies in 2017. However subscriptions of *TV & Satellite Week* increased **3.3%** YoY to **1.4 million** and subscriptions of *TV Times* increased **9.3%** YoY to **0.9 million**.

Subscriptions for **Children's Magazines** saw a large decline of **(34.7%)**. Subscriptions of *First News* decreased **(41.1%)** YoY to **3.5 million**. However, subscriptions of *The Beano* increased **8.3%** YoY to **1.1 million**.

Subscription Sales YoY – Top 15



Sector and Subscriptions Share

- Women's Traditional - 2.8%
- Home Improvement - 2.4%
- Women's Interests - Home Interest - 3.3%
- Countryside & County - 1.2%
- Adult - 0.1%
- Women's Interests - Other - 2.2%
- TV Listings - UK - 11.0%
- Music - 0.8%
- Women's Lifestyle/Fashion - 6.9%
- Computer Gaming - 0.1%
- General Interest - 5.5%
- Leisure Interests - 4.2%
- Women's Celebrity - 1.9%
- Teenage Magazines - 0.0%
- News & Current Affairs - 45.8%

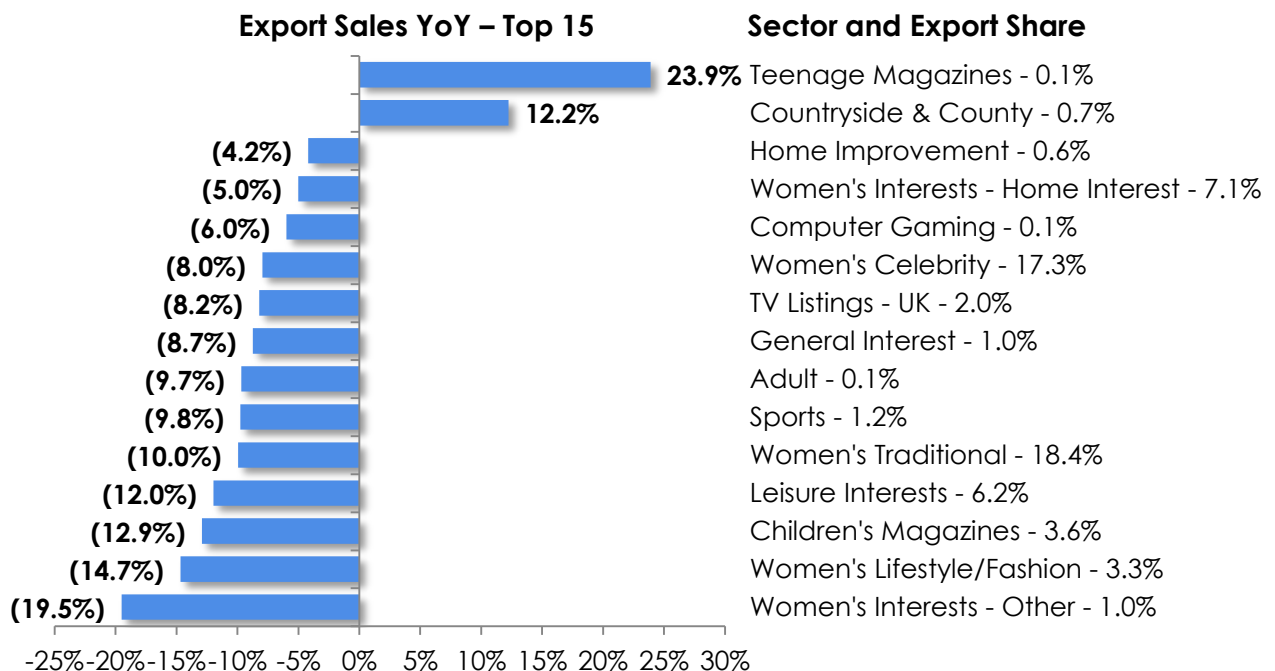


# Export Summary

In 2018, export newstrade made up **2.7%** of the total ABC market. A total of **16.3 million** export newstrade copies were sold, a YoY decline of **(15.4%)**. Comparatively few titles release an export ABC compared to what's published. Only **7.0%** of titles published by Marketforce in 2018 released an export ABC. Over the latest 12 closed months, Marketforce export sales have seen a better performance than export ABC declining **(2.4%)** YoY.

The monthlies have outperformed the weeklies recording year on year declines of **(13.3%)** and **(16.7%)** respectively. The monthlies have increased their share of export newstrade to **38.1%**, a movement of **1.0%** points.

*The Economist* is the biggest selling export title, with a share of **16.5%**. This is followed by *HELLO!* with a share of **12.3%**. *HELLO!*, *Sparkle World*, and *Harpers Bazaar* have all recorded YoY growth of **7.8%**, **11.8%** and **52.1%** respectively.



**Teenage Magazines** was the best performing sector year on year, up **23.9%**. Its export newstrade accounts for **2.2%** of its total combined ABC, a **0.7%** point increase YoY. Driving this increase was *Shout* which saw export growth of **32.6%** YoY.

**Countryside & Country** was the second best performing sector with an export increase of **12.2%** YoY. *Country Life* is the biggest title in this sector and saw a **10.1%** increase in sales YoY. The second biggest title, *Scots Magazine*, was also in YoY growth up **35.1%**. Export newstrade accounted for **3.8%** of its total combined ABC, a **0.4%** point increase YoY.

The **News & Current Affairs** and **Women's Traditional** sectors continue to be the largest in export with a share of **23.5%** and **18.4%** respectively. *The Economist* and *The Spectator* lead the **News & Current Affairs** sector and *Woman's Weekly* and *The People's Friend* top the **Women's Traditional** sector.



# Contact Details

---

This report was prepared by  
Marketing Services, Marketforce (UK) Ltd  
February 2019

**For any queries about this report please contact:**

Yasemin Kemal on 020 3787 9096

Nikki Patel on 020 3787 9080

Stephen Wright on 020 3787 9187

