The Publishing Industry Market Review 2006

Description: This Market Review examines the UK publishing industry. It is estimated that the total market was worth £18.63bn in 2005, having increased by 7.6% across the review period (2001 to 2005). Newspaper publishing accounts for the largest share of the market’s total value, followed by magazine publishing, then book publishing.

Each of these three markets is dominated by around a dozen companies and very few companies are active in more than one market. Only one company, Pearson PLC, is involved in all three markets in a significant way. News Corporation, which publishes newspapers and which owns the book publisher Harper Collins, entered the magazine market early in 2006 with two titles and a third planned. However, a number of newspaper publishers are also active in the magazine market. Few book publishers are involved in magazines. One notable exception is BBC Worldwide, which has become a success in both book and magazine publishing.

The UK publishing industry is still primarily UK owned. However, in the magazine market, there are several foreign-owned companies, including the following: The Conde Nast Publications Ltd, Hachette Filipacchi (UK) Ltd, IPC Media Ltd, The National Magazine Company Ltd, The Readers Digest Association Ltd and VNU Business Publications Ltd.

In the newspaper market, the regional newspaper groups Newsquest Media Group Ltd and Independent News and Media Ltd are owned by US and Republic of Ireland companies, respectively.


Contents:

Executive Summary
INTRODUCTION
MAGAZINES
NEWSPAPERS
BOOKS
FUTURE

1. Market Overview
REPORT COVERAGE
Report Background
ECONOMIC TRENDS
Population
Table 1.1: UK Resident Population Estimates by Sex (000), Mid-Years 2001-2005
Gross Domestic Product
Table 1.2: UK Gross Domestic Product at Current and Annual Prices (£m), 2001-2005
Inflation
Table 1.3: UK Rate of Inflation (%), 2001-2005
Unemployment
Table 1.4: Actual Number of Unemployed Persons in the UK (million), 2001-2005
MARKET SIZE
The Total Market
Table 1.5: The Total UK Publishing Industry by Market by Value at Current Prices (£m), 2001-2005
MARKET SEGMENTATION
Newspapers
Magazines
Books
INDUSTRY STRUCTURE
Industry Synopsis
Table 1.6 Average Financial Performance of Companies in the UK Publishing Industry (£000, % and £), Latest Financial Year
Industry Concentration
Number of UK Businesses
MARKET POSITION

KEY TRENDS

Continued Growth in Titles

More Restructuring in the Newspaper Industry

The Printed and Electronic Media Mix

LEGISLATION

KEY TRADE ASSOCIATIONS

Book Marketing Ltd

The Booksellers Association

Newspaper Publishers Association

Newspaper Society

Nielsen BookData

Periodical Publishers Association

The Publishers Association

2. PEST Analysis

INTRODUCTION

POLITICAL

Government Advertising

Regulating Magazine Distribution

Magazine Postal Deliveries

Quick Reads

ECONOMIC

General Economic Outlook

Advertising

Concentration of Publishers and Booksellers

SOCIAL

Poor Literacy Levels

Falling Library Borrowing and Book Spending

Not Enough Young Newspaper Readers

Celebrity Culture

Time Pressures

Media Grazing

TECHNOLOGICAL

The Internet

Google

Amazon

The Sony Reader

Electronic Self-Publishing

3. Key Note Field Research

INTRODUCTION

NEWSPAPERS

Buying Habits and Attitudes

By Sex

Table 3.1: Consumers’ Newspaper Buying Habits and Their Attitudes Towards Newspapers by Sex (% of adults), 2006

By Age

Table 3.2: Consumers’ Newspaper Buying Habits and Their Attitudes Towards Newspapers by Age (% of adults), 2006

By Social Grade

Table 3.3: Consumers’ Newspaper Buying Habits and Their Attitudes Towards Newspapers by Social Grade (% of adults), 2006

Sources of News

By Sex

Table 3.4: Consumers’ Main Source of News by Sex (% of adults), 2006

By Age
Table 3.5: Consumers' Main Source of News by Age (% of adults), 2006
By Social Grade
Table 3.6: Consumers' Main Source of News by Social Grade (% of adults), 2006
MAGAZINES
Penetration
By Sex
Table 3.7: Penetration of Magazines by Type by Sex (% of adults), 2006
By Age
Table 3.8: Penetration of Magazines by Type by Age (% of adults), 2006
By Social Grade
Table 3.9: Penetration of Magazines by Type by Social Grade (% of adults), 2006
Attitudes Towards Magazines
By Sex
Table 3.10: Attitudes Towards Magazines by Sex (% of adults), 2006
By Age
Table 3.11: Attitudes Towards Magazines by Age (% of adults), 2006
By Social Grade
Table 3.12: Attitudes Towards Magazines by Social Grade (% of adults), 2006
BOOKS
Buying Habits
By Sex
Table 3.13: Consumers' Book Buying Habits by Sex (% of adults), 2006
By Age
Table 3.14: Consumers' Book Buying Habits by Age (% of adults), 2006
By Social Grade
Table 3.15: Consumers' Book Buying Habits by Social Grade (% of adults), 2006

4. Competitive Structure
MARKET LEADERS
Archant Regional Ltd
Company Structure
Financial Results
BBC Worldwide Ltd
Company Structure
Financial Results
Blackwell Publishing (Holdings) Ltd
Company Structure
Financial Results
Bloomsbury Publishing PLC
Company Structure
Financial Results
Cambridge University Press
Company Structure
Financial Results
Centaur Holdings PLC
Company Structure
Financial Results
CMP Information Ltd
Company Structure
Financial Results
The Conde Nast Publications Ltd
Company Structure
Financial Results
Daily Mail & General Trust PLC
Company Structure
Financial Results
DC Thomson & Company Ltd
Company Structure
Financial Results
Dennis Publishing Ltd
Company Structure
Financial Results
dmg World Media (UK) Ltd
5. Newspaper Publishing

DEFINITION
Geographical Spread
Frequency of Publication
Type of Readership
KEY TRENDS
Nationals
Regionals
MARKET SIZE
The Total Market
By Value
Table 5.1: The Total UK Newspaper Publishing Market by Source of Revenue by Value (£m), 2001-2005
Table 5.2: The Total UK Newspaper Publishing Market by Geographical Sector by Value (£m), 2001-2005
Regional Advertising Revenue
Table 5.3: UK Regional Newspaper Advertising Revenue by Subsector (£m), 2001-2005
Overseas Sales
By Market Sector
National Newspapers
Daily Papers
Table 5.4: The UK National Daily Newspaper Subsector by Average Net Circulation (number of copies per day), September 1999 to February 2000, August 2001 to January 2002, May to October 2003 and January 2006
Sunday Papers
Table 5.5: The UK National Sunday Newspaper Subsector by Average Net Circulation (number of copies per day), September 1999 to February 2000, August 2001 to January 2002, May to October 2003 and January 2006
Regional Papers
Morning Papers
Table 5.6: Selected Leading English Regional Morning Newspapers by Average Net Circulation (number of copies per day), July to December 2001, January to June 2003 and July to December 2005
Table 5.7: Selected Leading Scottish, Northern Irish and Welsh Morning Newspapers by Average Net Circulation (number of copies per day), July to December 2001, January to June 2003 and July to December 2005
Evening Papers
Table 5.8: Selected Leading UK Regional Evening Newspapers by Average Net Circulation (number of copies per day), July to December 2001, January to June 2003 and July to December 2005
Weekly Papers
Table 5.9: Selected Leading UK Regional Weekly Newspapers by Average Net Circulation (number of copies per week), July to December 2001, January to June 2003 and July to December 2005
Paid-For Sunday Papers
Table 5.10: Selected Leading UK Regional Sunday Newspapers by Average Net Circulation (number of copies per week), July to December 2001, January to June 2003 and July to December 2005
Free Newspapers
Table 5.11: The Top 20 Free Regional Newspapers by Average Net Distribution, July to December 2005
Free Sunday Newspapers
Table 5.12: The UK's Free Sunday Papers Ranked by Circulation, July 2005 to January 2006
SUPPLY STRUCTURE
National Newspapers
Regional Newspapers
Distribution
Key Trade Associations
The Press Complaints Commission
MAJOR PLAYERS
National Newspaper Publishers
Regional Newspaper Publishers
Table 5.13: The Top Ten Regional Newspaper Publishers by Average Net Circulation and Number of Titles, January to June 2005
BUYING BEHAVIOUR
FORECASTS
Table 5.14: The Forecast Total UK Newspaper Publishing Market by Geographical Sector by Value (£m), 2006-2010

6. Magazine Publishing
DEFINITION
Consumer Magazines
Business and Professional Magazines
KEY TRENDS
Consumer Magazines
Number of Titles
Table 6.1: The Principal UK Consumer Magazine Subsectors by Number of Titles Published, January 2006
Circulation
Leading Sectors
Table 6.2: The Top Ten UK Consumer Magazine Sectors by Average Net Circulation (number), July to December 2001
Leading Titles
Table 6.3: The Top 20 Paid-For Consumer Magazines by Average Net Circulation (number), July to December 2005
Business and Professional Magazines
Number of Titles
Table 6.4: The UK Business and Professional Magazine Subsectors by Number of Titles Published, January
2006
Circulation
Leading Titles
Table 6.5: The Top Ten Business and Professional Titles by Average Net Circulation (number), July 2004 to June 2005
MARKET SIZE
The Total Market
By Value
Table 6.6: The Total UK Magazine Publishing Market by Source of Revenue by Value (£m), 2001-2005
By Volume
Table 6.7: The Total UK Magazine Publishing Market by Sector by Volume (number of titles), Years Ending December 2001-2005
By Market Sector
Consumer Magazines
Television Listings Magazines
Table 6.8: Top Television Listings Magazines by Average Net Circulation (number), July to December 2002-2005
Women's Weekly Magazines
Table 6.9: Top Women’s Weekly Magazines by Average Net Circulation (number), July to December 2002-2005
Women's Monthly Magazines
Table 6.10: Top Women’s Monthly Magazines by Average Net Circulation (number), July to December 2002-2005
Women's Health and Beauty Magazines
Table 6.11: Selected Women's Health and Beauty Magazines by Average Net Circulation (number), July to December 2002-2005
Teenage Magazines
Table 6.12: Selected Teenage Magazines by Average Net Circulation (number), July to December 2002-2005
Pop and Rock Music Magazines
Table 6.13: Selected Pop and Rock Music Magazines by Average Net Circulation (number), July to December 2002-2005
Men's Magazines
Table 6.14: Selected Men's Magazines by Average Net Circulation (number), July to December 2002-2005
Motoring Magazines
Table 6.15: Selected Motoring Magazines by Average Net Circulation (number), July to December 2002-2005
Photography Magazines
Table 6.16: Selected Photography Magazines by Average Net Circulation (number), July to December 2002-2005
Computing Magazines
Table 6.17: Selected Computing Magazines by Average Net Circulation (number), July to December 2002-2005
Computer Games Magazines
Table 6.18: Selected Computer Games Magazines by Average Net Circulation (number), July to December 2002-2005
Boating and Fishing Magazines
Table 6.19: Selected Boating and Fishing Magazines by Average Net Circulation (number), July to December 2002-2005
Football Magazines
Table 6.20: Selected Football Magazines by Average Net Circulation (number), July to December 2002-2005
Golf Magazines
Table 6.21: Selected Golf Magazines by Average Net Circulation (number), July to December 2002-2005
Home Interest/Lifestyle Magazines
Table 6.22: Selected Home Interest/Lifestyle Magazines by Average Net Circulation (number), July to December 2002-2005
Gardening Magazines
Table 6.23: Selected Gardening Magazines by Average Net Circulation (number), July to December 2002-2005
Cookery and Kitchen Magazines
Table 6.24: Selected Cookery and Kitchen Magazines by Average Net Circulation (number), July to December 2002-2005
Business and Professional Magazines
General Business Management Magazines
Financial Services Magazines
Medical Magazines
Grocery and Licensing Magazines
Agricultural and Farming Magazines
Table 6.29: Selected Leading Agricultural and Farming Magazines by Average Net Circulation (number), July to June 2000/2001 and 2004/2005
Travel Magazines
Marketing Magazines
Construction and Building Magazines
SUPPLY STRUCTURE
MAJOR PLAYERS
BUYING BEHAVIOUR
Consumer Magazines
Business and Professional Magazines
FORECASTS
Table 6.33: The Forecast UK Magazine Publishing Market by Value (£m), 2006-2010

7. Book Publishing
DEFINITION
Consumer Books
Academic/Professional Books
School Books
KEY TRENDS
MARKET SIZE
The Total Market
By Value
Table 7.1: The Total UK Book Publishing Market by Sector by Value (£m at rsp), 2001-2005
By Volume
Table 7.2: The Number of English-Language Book Titles Published in the UK, 2001-2005
Overseas Trade
Exports
Table 7.3: UK Publishers' Export Sales by Value (£m), 2001-2004
Imports
SUPPLY STRUCTURE
DISTRIBUTION
Retailing
Bookshop Chains
Independent Bookshops
Supermarkets and Mixed Multiples
Other Outlets
Book Clubs
The Internet
Mail Order
MAJOR PLAYERS
BUYING BEHAVIOUR
Table 7.4: Book Buying Habits of UK Consumers (% of adults), 2001-2005
FORECASTS
Table 7.5: The Forecast UK Book Publishing Market by Value (£m at rsp), 2006-2010

8. A Global Perspective
BOOK PUBLISHING
9. The Future
INTRODUCTION
ECONOMIC FORECASTS
Population
Table 9.1: Forecast UK Resident Population by Sex (000), Mid-Years 2006-2010
Inflation
Table 9.2: Forecast UK Rate of Inflation (%), 2006-2010
Gross Domestic Product
Table 9.3: Forecast UK Growth in Gross Domestic Product in Real Terms (%), 2006-2010
MARKET FORECASTS
Table 9.4: The Forecast UK Publishing Market by Sector by Value (£m), 2006-2010
FUTURE TRENDS
Convergence and Fragmentation
Is There Room for New Launches?
Reshaping the Magazine Market
Facing the New Challenges

10. Consumer Confidence
METHODOLOGY
KEY FINDINGS THIS QUARTER
THE WILLINGNESS TO BORROW
A Slow Start to 2006
The Desire to Borrow Stays Strong
Table B: The Number of Adults Willing to Borrow in Order to Purchase Expensive Items (000 and %), February 2005, May 2005, August 2005, November 2005 and February 2006
THE WILLINGNESS TO SPEND FROM SAVINGS
Spending From Savings Declines
Table D: The Average Amount Consumers Are Willing to Spend from Savings in Order to Purchase Expensive Items at Current and Constant November 2004 Prices (£ and £bn), February 2005, May 2005, August 2005, November 2005 and February 2006
Consumers Increasingly Cautious
Table E: The Average Amounts Adults are Confident Spending to Purchase Expensive Items (£ and %), February 2005, May 2005, August 2005, November 2005 and February 2006

11. Further Sources
Associations
General Sources
Government Publications
Other Sources
Bisnode Sources

Ordering:
Order Online - http://www.researchandmarkets.com/reports/340227/
Order by Fax - using the form below
Order by Post - print the order form below and send to
Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct.

Web Address: http://www.researchandmarkets.com/reports/340227/
Office Code: SCDK97S1

Product Format
Please select the product format and quantity you require:

Quantity
Electronic (PDF) - Single User: [ ] USD 845

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title: [ ] Mr [ ] Mrs [ ] Dr [ ] Miss [ ] Ms [ ] Prof
First Name: ________________ Last Name: ________________
Email Address: * ______________________________________
Job Title: _____________________________________________
Organisation: __________________________________________
Address: _____________________________________________
City: _________________________________________________
Postal / Zip Code: _____________________________________
Country: _____________________________________________
Phone Number: _______________________________________
Fax Number: _________________________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:
Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB9853083313083
Bank Address Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: ________________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World