UK Consumer Publishing Industry Report 2009

Description: This report has been fully revised and covers a host of issues present in the consumer publishing industry. Why are there so many national newspapers in a declining industry, what are the latest threats to regional newspapers and what existing competitors are doing to address them, what happens when a new afternoon paper launches in London, what are the merits of investing in editorial versus radical changes to your revenue model, how have changes in the power of buyers changed book publishing, what exactly is the long tail theory, are e-books finally about to transform book publishing, how is the influence of supermarkets growing in magazine distribution, will the web change how we consume magazines, why do so many new magazines fail and why is it harder than ever for magazine publishers to compete.

These and many other issues are covered in a comprehensive analysis of the industry dynamics for the consumer publishing industry in the UK. The report is divided into four industries: national newspapers, regional newspapers, consumer books and consumer magazines. It uses proven economic frameworks to provide a balanced and objective assessment of the challenges facing the industry.

Question answered in this report

National Newspapers

Demand factors
- How big is the market, how is it segmented, how fast is it declining?
- Who are the main buyers in this market and what buyer power do they have?
- What is the split between copy sales and advertising sales and what drives these numbers?
- What tactics do newspaper owners use to boost demand?

Supply factors
- Who are the main players in the industry?
- Why have new entrants failed to make an impression on the market?
- What are the barriers to entry, how important are supply-side economies of scale and demand side benefits of scale?
- What are the issues around the distribution of newspapers?
- Which strategies can we observe as competitors try and maintain a competitive advantage?
- What innovations have newspaper operators introduced to compete and have they been successful?
- What is driving pricing competition in the national newspaper industry?
- How is competition in the online market evolving?

Regional Newspapers

Demand factors
- How is demand segmented and which parts of the market are suffering the most?
- Which segments of the market have suffered in recent years?
- How is buyer power affected by the dual revenue model present in regional newspaper publishing?
- How have regional newspapers supported pricing power in the face of the threat of substitutes?
- What substitutes exist and how are these changing the market for regional newspapers?

Supply factors
- Who are the main players in the industry?
- What influences barriers to entry?
- An explanation of strategies regional newspaper groups have adopted to shore up their competitive positions, including cost cutting, editorial cuts and investment, hyper local websites, new revenue models.
- Why have regional newspaper companies come under criticism for cutting their cost base?
- How are pressures on revenue drivers and wider social trends affecting editorial decisions?
Consumer Books

Demand factors

- What is the size of the market?
- What are the drivers of demand and what has been the biggest stimulus of demand in recent years?
- How have structural changes in the supply chain affected buyer power?
- Who are the largest players in book retailing and how is their influence changing consumer book publishing?
- What exactly is the long tail theory and is it changing book publishing?
- What is the threat of substitute products and what are the latest developments in e-books?

Supply factors

- How has consolidation affected the supply of consumer books?
- What has driven down barriers to entry and how do established publishers compete against self publishers?
- How have buyer strategies influenced the strategies followed by book publishers?
- Why haven't competitive pressures gravitated solely towards price competition?
- How are publishers hoping to discover new talent?
- Who gets what: how is the cover price of a book divided up between the author, publisher and distribution chain?

Consumer Magazines

Demand factors

- What is the split between copy sales and advertising and what are the drivers behind these revenue streams?
- How is the consumer magazine market segmented and what do advertisers consider when buying space in a magazine?
- What are the links in the supply chain between the magazine publisher and the consumer?
- What might happen to the consumer magazine market in a downturn?
- What impact has the internet had on demand?

Supply factors

- How are barriers to entry in the industry changing?
- How do the characteristics of the market affect market entry and what is a long tail market?
- Who are the largest magazine publishers and which ones are traditional consumer magazine publishers and which ones are custom magazine publishers?
- Why are some notable segments of the market suffering?
- What steps are magazine publishers taking to reduce the risks involved in new launches?
The power of suppliers

Charts

Chart 1 National newspapers market by income / segmentation
Chart 2 National newspapers market share by company
Chart 3 National newspapers sector chart (circulations)
Chart 4 National newspapers sector chart (turnover)

Regional Newspapers

Introduction
Demand
Market segmentation
Income
The power of buyers
The threat of substitute products
Supply
The threat of new entrants
Rivalry among existing competitors
Editorial
Online
Cost cutting
Pricing and distribution
The power of suppliers

Regional Newspapers continued

Charts

Chart 5 Regional newspapers market by income / segmentation
Chart 6 Regional newspapers market share by company

Consumer Books

Introduction
Demand
Market size
The power of buyers
The threat of substitute products
Supply
The threat of new entrants
Rivalry among existing competitors
The power of suppliers

Consumer Magazines

Introduction
Demand
Size of the market
Income sources
Advertising
Market segmentation
Customer magazines
Overseas
The power of buyers
The threat of substitute products
Supply
The threat of new entrants
Rivalry among existing competitors
Segmentation strategies
Magazine launches
Brand extension
The power of suppliers

Charts

Chart 7 Consumer magazines long tail market
Chart 8 Consumer magazines market share by company

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