



Periodical Publishers Association

Promoting magazines and B2B media

THE MAGAZINE INDUSTRY IN SCOTLAND



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EXECUTIVE SUMMARY

This survey of 195 magazine publishers in Scotland elicited responses from 78 organisations, a 40 per cent response rate.

- Total employment of the magazine publishing sector in Scotland is approximately 1,300 full time and 565 part time staff. In addition, organisations employed 4,400 freelance staff in the past year
- The survey estimates there are 712 magazine titles published in Scotland
- The value of the industry is estimated at £157 million (updated April 2006)
- The Scottish magazine publishing industry is a similar size to the Cashmere industry in Scotland, the business tourism industry in Edinburgh and Edinburgh's flagship summer festivals and events in Edinburgh and the Lothians
- Almost three quarters of respondents anticipated that their magazine business would grow over the next three years
- Key issues for the development of the Scottish magazine sector were distribution, the limited marketplace in Scotland and costs of printing and promotion
- 60 per cent of magazine circulation is in Scotland. The Scottish market is particularly important for organisations that do not specialise in magazine publishing such as public sector organisations, charities and professional/membership associations
- Almost half the respondents had been involved in some form of staff training related to magazine publishing in the past year, but levels of satisfaction with the training available were low. The main gaps in training related to advertising sales and subscription staff training
- The average frequency of publication is eight times a year, with 40 per cent of titles published either quarterly or bi-monthly
- Average pagination is 69 pages¹ per title, ranging from an average of 82 pages for consumer titles to 60 pages for business titles
- The highest circulation of any one magazine in Scotland is 372,743, while the lowest circulation of any one magazine is 1000
- An estimate shows 4.6 billion sheets of A4 paper are required by the magazine industry in Scotland to meet its printing needs

¹ an exact average, not multiples of four

INTRODUCTION AND OBJECTIVES

This report describes the results of research commissioned by PPA Scotland and conducted by Scotinform Ltd. The study, co-funded by Scottish Enterprise Edinburgh & Lothian, aimed to build on initial sampling research conducted by the PPA in 1998 which led to the establishment of a PPA office in Scotland.

The results of the 1998 study showed that there were at least 40 organisations involved in magazine publishing in Scotland printing 214 magazine titles and with a combined turnover of nearly £60 million. During 2004, PPA Scotland conducted further research which identified 125 organisations involved in magazine publishing in Scotland. As a result PPA Scotland commissioned a further independent study with the support of Scottish Enterprise Edinburgh & Lothian.

The overall aim of the study was to conduct a survey of Scottish magazine publishers, with the specific objectives of:

1. identifying the number of magazines published
2. identifying key business performance indicators (turnover, employees, etc)
3. identifying training and other business development needs

METHODOLOGY AND SAMPLE

The first phase of the study involved desk research by PPA Scotland and Scotinform to identify additional organisations involved in publishing magazines in Scotland. This research identified a total population of 195 organisations all of which were sent a self-completion questionnaire in February 2005 with follow up telephone calls being made and emails sent to encourage responses. A total of 78 organisations returned a completed questionnaire, an excellent response rate of 40 per cent. The 78 respondents include current members of PPA Scotland.

All non-respondents were contacted to establish reasons for non-response and to confirm that they were involved in magazine publishing. This confirmed that the 195 organisations were involved in magazine publishing, with the main reasons for non-response being lack of time, difficulties in producing the figures requested or concerns about confidentiality.

The responses from the 78 organisations have been analysed and used to form the basis of estimating the size and value of the magazine sector in Scotland. This has been done by grossing up the figures provided, on the assumption that organisations who responded are representative of the sector.

RESEARCH RESULTS

The following definition of a magazine was used in the survey:

“A magazine is defined as any journal that is published on a regular basis at least twice a year and not more frequently than once a week, and is sold or distributed independently of other publications. A customer, staff or member magazine is a magazine (not a brochure or newsletter or catalogue) published at least twice a year by or on behalf of an organisation to communicate with its customers. Newspaper supplements are not eligible”

Profile of Sector

63 per cent of respondents said that their main business activity was magazine publishing and a further 13 per cent were involved in the media related activities, including newspaper publishing.

This suggests that there are 123 organisations whose principal activity is magazine publishing in Scotland and over 65 organisations from other sectors. The diverse nature of the sector is illustrated by the wide range of organisations from other sectors, including local authorities, charities, business associations and utility companies.

Table One: Principal activity of organisation

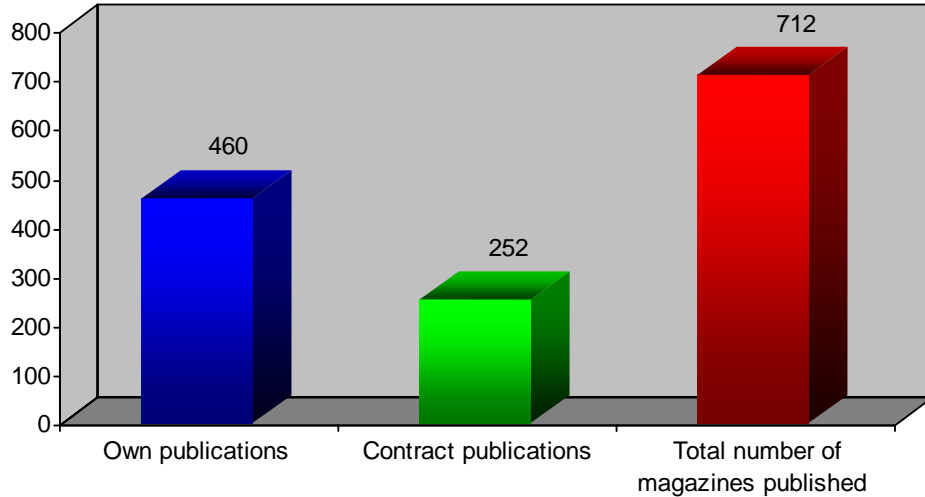
	%
Magazine publishing	63
PR/Advertising/Design/Marketing	4
Other media related	9
Public sector	8
Sports/leisure tourism	4
Charity/voluntary organisations	4
Special interest group/association	4
Professional institute/business organisation	3
Other	1

Two thirds of organisations are involved in publishing consumer titles (including titles such as member magazines for the National Trust for Scotland and Historic Scotland), a third in business or professional magazines (such as *CA Magazine* and *Scottish Business Insider*) and 5 per cent in literary titles (such as *Chapman* and *The Edinburgh Review*). Some publishers publish more than one type of magazine.

Number of Magazine Titles

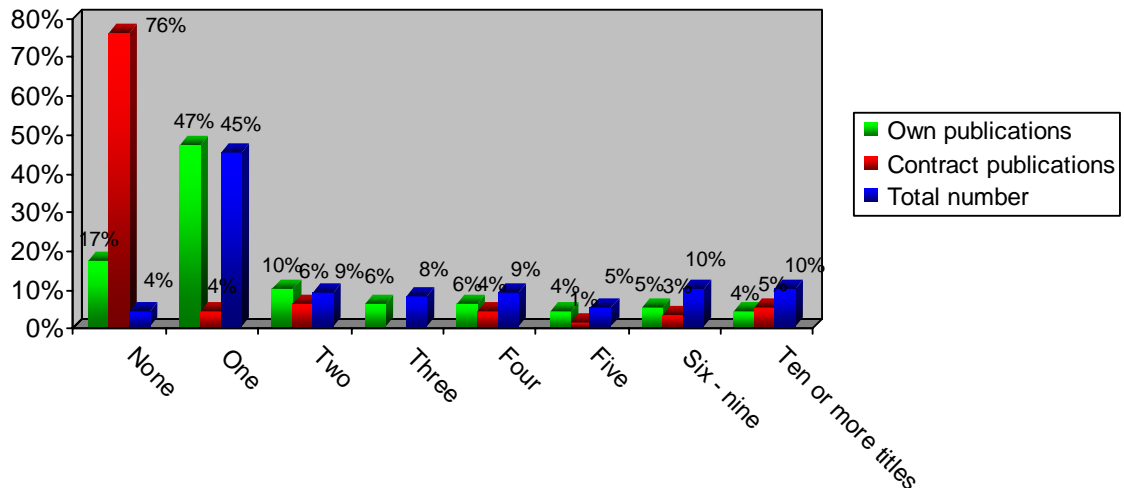
The total number of magazine titles in Scotland is estimated at 712. Two thirds of the titles are own publications and a third are contract.

Table Two: Number of magazine titles published in Scotland



Although this represents an average of nearly four titles per organisation, in fact 54 per cent of the organisations publish only one or two titles, illustrating the high proportion of small publishers. At the other end of the scale, 10 per cent of organisations publish ten or more titles. Four per cent (three respondents) do not produce any titles at all in Scotland, while 7 per cent do not produce any of their own publications in Scotland.

Table Three: Breakdown of number of titles published



The 'none' category indicates the percentage of organisations that do not publish magazine titles in Scotland.

Size of Sector

It is likely that the number of other organisations involved in magazine publishing has been underestimated in the survey as the main aim of the desk research was to identify companies for whom magazine publishing was the core activity. For example the sample for the research does not include a comprehensive list of publications from organisations such as:

- local authorities
- top 250 Scottish companies (staff magazines)
- voluntary and charitable organisations
- churches

It would therefore be realistic to assume that there are in excess of one thousand magazines published in Scotland.

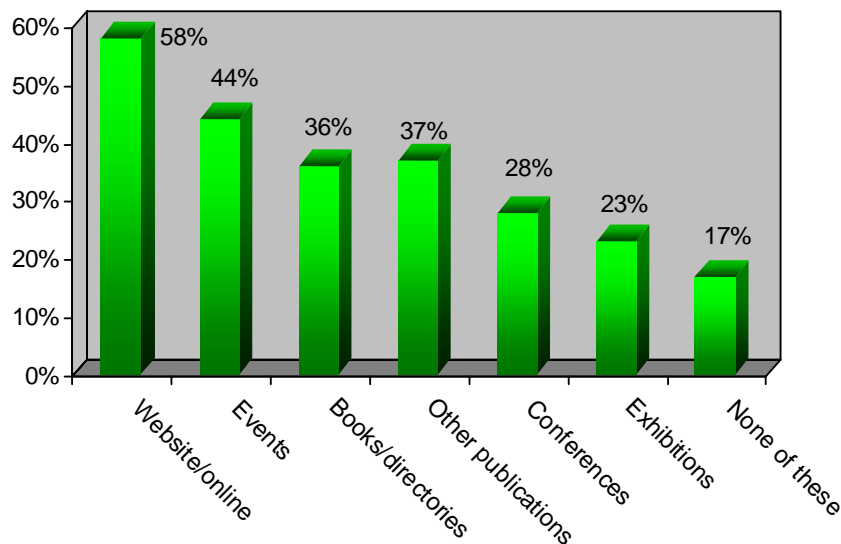
Other Activities

36 per cent of organisations were involved with publishing other products (for example, newsletters or directories). Organisations involved with publishing business magazines were much more likely to be involved with other types of publications than those publishing consumer or literary titles.

83 per cent of respondents were involved in other activities as shown in the chart below. Larger organisations with a turnover of £250,000 plus were more likely than smaller organisations to be involved in other activities. As shown later in the report very few magazines were replicated online.

Website/online was the most likely non-magazine related activity, with nearly 60 per cent of respondents saying they were involved in this area. Only 8 per cent of respondents (6 organisations) did not have a website. Respondents claimed that 41 per cent of titles were available online, although it is not clear what proportion of the magazine is available through this method.

Table Four: Other activities

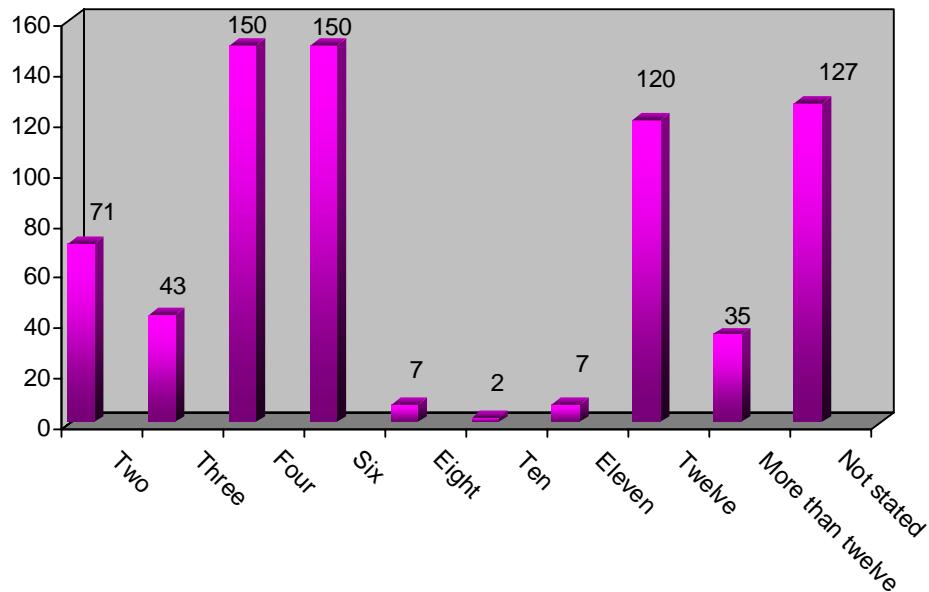


Frequency of Publication

The average frequency of publication was eight times a year, with a fifth of the titles published quarterly and a fifth published bi-monthly. Consumer magazines had a higher than average frequency with nearly ten issues per year. This compared with an average of seven issues a year for business publications and 3 issues per year for literary titles.

The chart below shows the number of titles published by frequency of publication, based on the total market of 712 magazines.

Table Five: Number of issues published per year



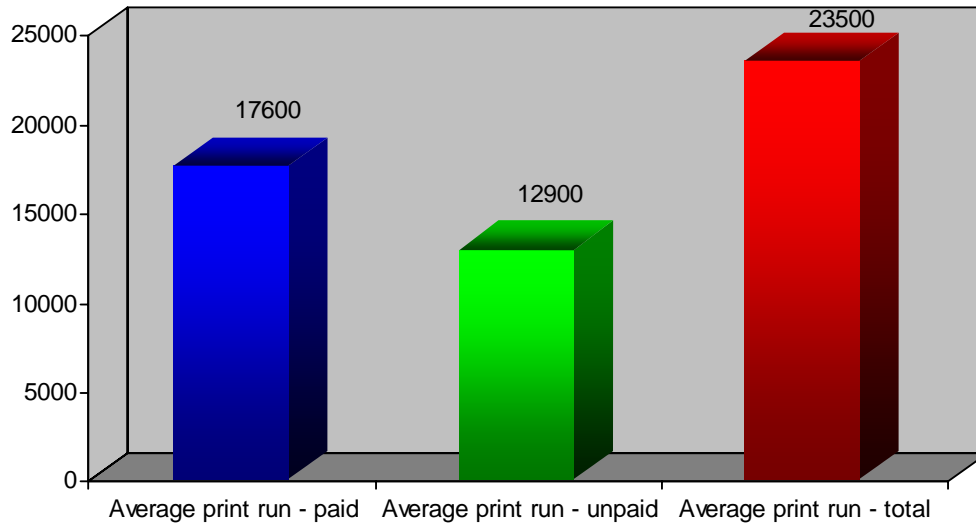
ABC/BPA Audited

Only 10 per cent of titles were ABC or BPA audited.

Print Run

The average print run per title was 23,500, 60 per cent of which is paid for. This compares with an average print run in the 1998 survey of 14,322 per issue.

Table Six: Average print run



Average Pagination

On average there were 69 pages per title², with an average pagination of 82 pages for consumer titles and 60 pages for business titles. The actual figures on pagination show a wide variance in size: 44 per cent of magazines are forty pages or less and 24 per cent are over a hundred pages.

At a rough estimate, 4.6 billion sheets of A4 paper are required by the magazine industry in Scotland to meet its printing needs.

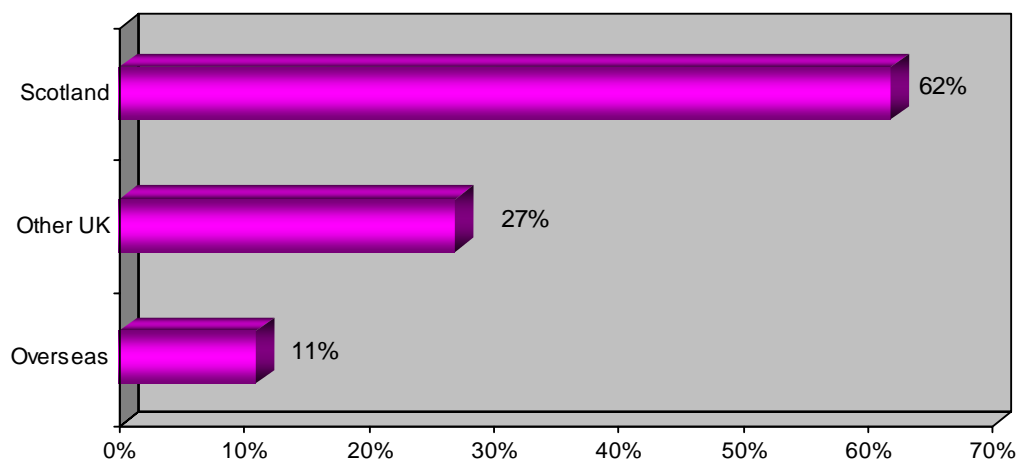
Table Seven: Average pagination

	%
Up to 20 pages	24
21-40 pages	20
41-60 pages	8
61-80 pages	9
81-100 pages	5
over 100	24
not stated	10

Circulation

Scotland accounts for over 60 per cent of the circulation of magazines and is a particularly important market for organisations that do not specialise in magazine publishing, such as the public sector, charities and associations. Over a quarter of circulation is elsewhere in the UK and 10 per cent is overseas. Business magazines had a higher proportion of circulation overseas than consumer magazines. These figures are similar to the 1998 survey, which showed that 64 per cent of circulation was in Scotland and 34 per cent was elsewhere in the UK. The highest circulation of any one magazine in Scotland is 372,743 while the lowest circulation of any one magazine is 1000.

Table Eight: Breakdown of circulation

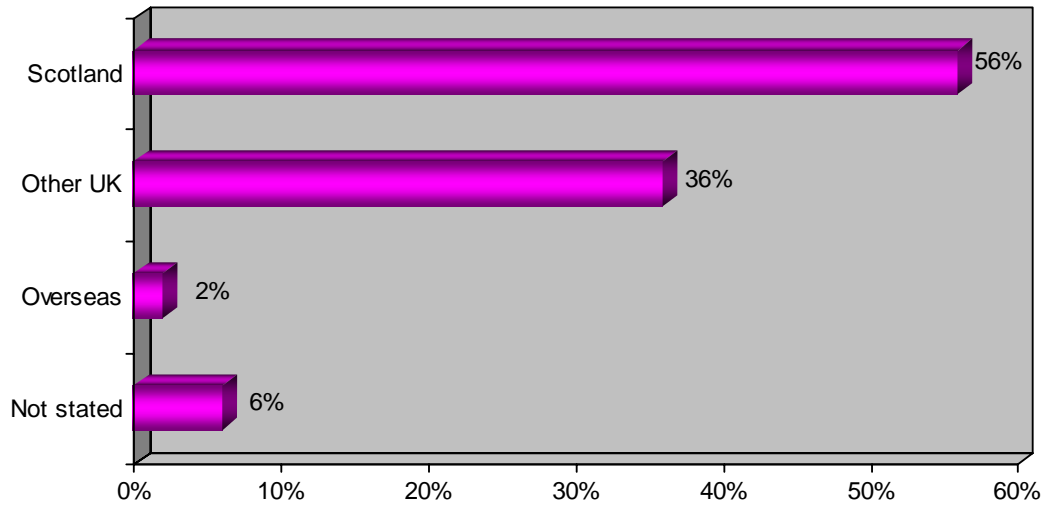


² This is an exact average - not multiples of four

Printing and Distribution

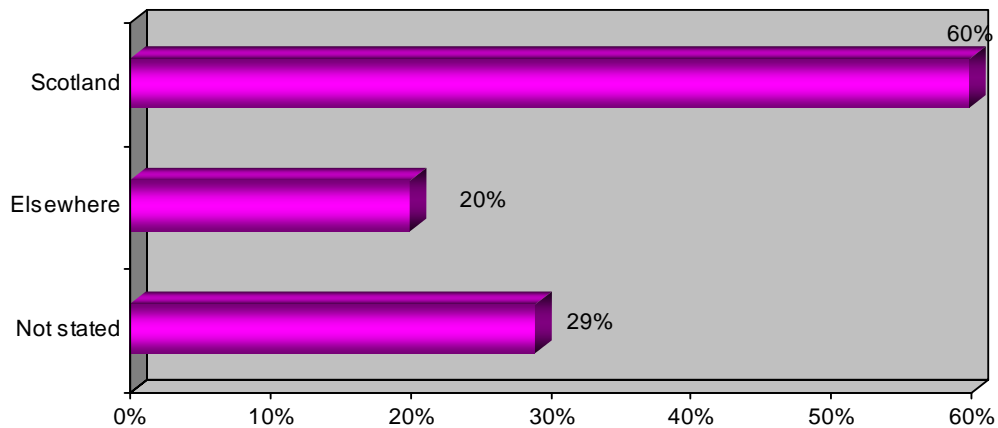
Nearly 40 per cent of titles are printed outside Scotland, principally elsewhere in the UK.

Table Nine: Location of Printers



29 per cent of titles did not have an external distributor or did not state where their distributor was based. 60 per cent use a Scottish company and 20 per cent use a distributor based elsewhere.

Table Ten: Location of Distributors



Outsourcing of Key Functions

69 per cent of organisations outsourced one of their major business functions, most likely to a Scottish-based company. The main function that companies outsource is photography: nearly half the publishers outsource this function.

27 per cent of companies are outsourcing elsewhere in the UK, with editorial and photography the two most likely functions to be outsourced. Almost one in ten companies are outsourcing editorial, photography and website functions overseas.

Table Eleven: Outsourcing of business functions

	In house	Outsourced		
		Scotland	Other UK	Overseas
	%	%	%	%
Editorial	87	23	9	5
Proof reading	87	14	1	0
Advertising/sales	74	18	1	0
Subscription management	74	10	4	0
Website/online	73	15	4	3
Design/production	69	25	5	0
Photography	48	51	16	4
Total	n/a	64	27	9

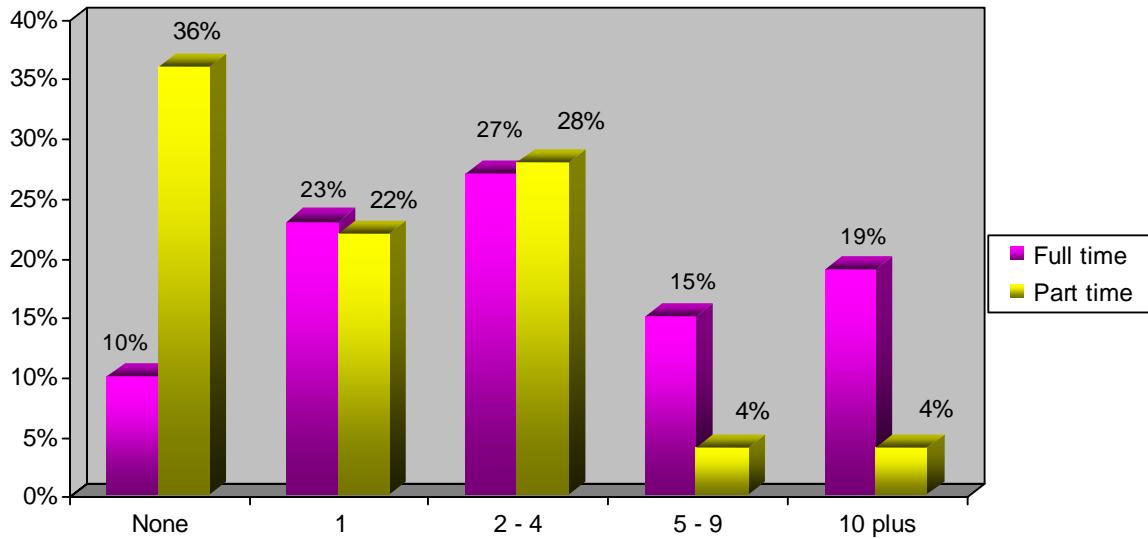
Employment in Magazine Publishing

On average, respondents employed 6.74 full time staff and 2.89 part time staff in magazine related employment. The highest levels of employment were, as you would expect in magazine publishers: these firms employed an average of 8 full time staff and 4 part time staff.

Magazine publishing is responsible for the employment of approximately 1,300 full time employees and 565 part time staff in Scotland. This represents 75 per cent of the staff employed by these organisations, suggesting that magazine publishing is a critical element of the business. For magazine publishers the proportion of staff employed in magazine related employment is over 90 per cent.

The table below shows the breakdown of staff within employment categories, illustrating that a quarter of organisations employ only one full time member of staff, whilst a fifth employ ten or more full time employees. Ten per cent of organisations did not employ any full time staff, while 36 per cent did not employ any part time staff.

Table Twelve: Number of staff employed in magazine publishing



In addition to the full and part time staff employed, organisations employed an additional 4,400 freelance staff in the past year.

The 'none' category indicates the percentage of organisations that do not employ any full time or part time staff in magazine related jobs.

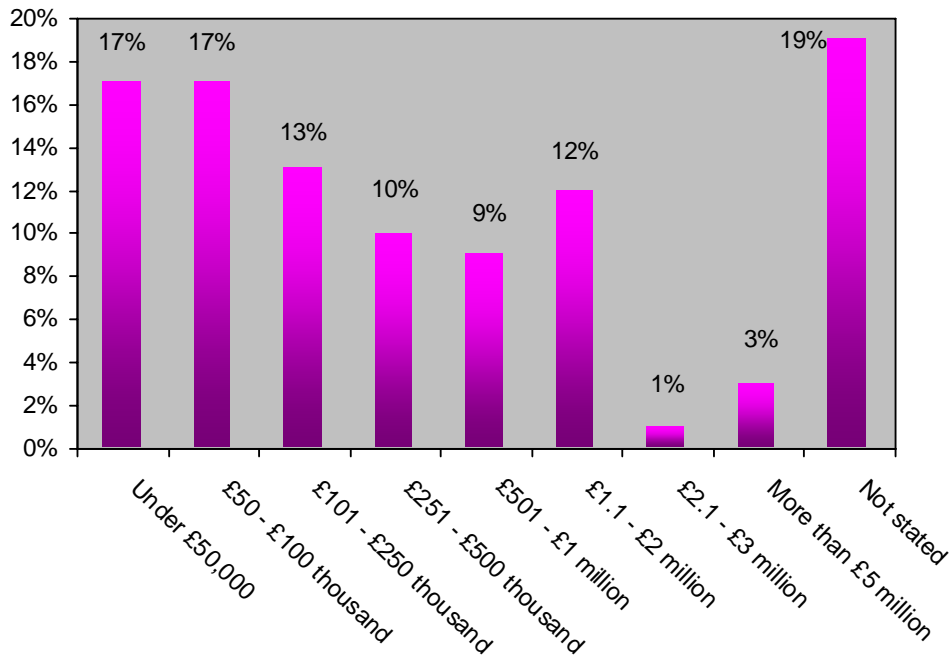
Industry Turnover

Respondents were asked to provide information on their organisation's turnover relating to magazine publishing in Scotland by indicating which turnover band they were in. The average turnover was calculated by taking the mid-point of each band, which gave an annual average of £650,000. This estimate suggests a total industry turnover of around £125 million.

This magazine related turnover represented an average of around 75 per cent of the turnover of the organisations involved (the same proportion as the employment figures shown earlier).

The turnover bands confirm the wide range of size of organisations involved in magazine publishing. Nearly half the organisations had a turnover of £250,000 or less and 16 per cent had a turnover of more than £1 million.

Table Thirteen: Turnover bands



This figure of £125 million from the Scottish magazine publishing industry compares with, the Cashmere industry which is said to be worth over £100 million to the Scottish economy, while the business tourism industry in Edinburgh and the Edinburgh flagship festivals and events industry are worth £125 million to the Edinburgh and Lothian local economy.

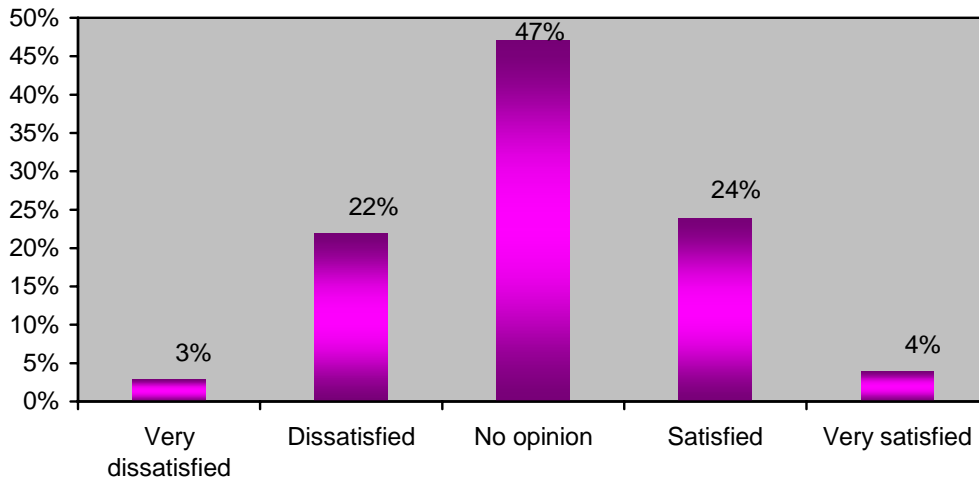
Source: The Scotsman and Convention Scotland

Training and Staff Development

Only 28 per cent of respondents were satisfied with the current availability of staff training, with 47 per cent of the sample having no opinion.

The quarter of respondents who were dissatisfied with training were most likely to be small companies and those publishing consumer magazines.

Table Fourteen: Satisfaction with training available



45 per cent of respondents said that their organisation had been involved in some form of training relating to magazine publishing in the past year. The most popular forms of training were advertising sales, design/print or management training.

The main gaps in training identified by respondents related to the sales related functions of sales and subscriptions.

Table Fifteen: Types of training undertaken

	Training undertaken %	Gaps in training %
Advertising/sales	23	18
Management	23	8
Design/Print/Production	19	9
Editorial	17	9
Finance	14	5
Subscriptions	13	12
Administration	9	4

Unprompted comments on training identified that the key issues were:

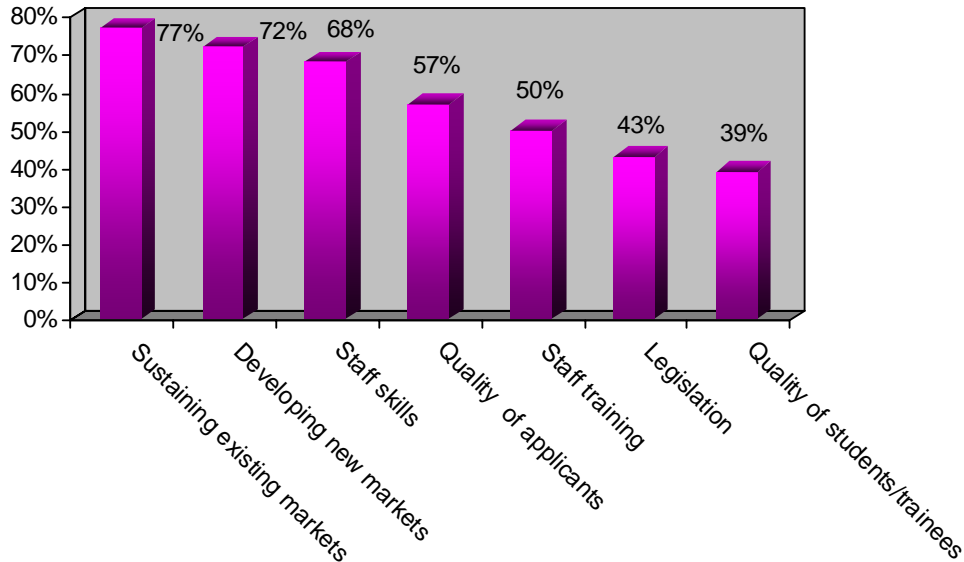
- lack of suitable training in Scotland for magazine publishing staff (several respondents had sourced training elsewhere in the UK)
- gaps in training for advertising sales, media sales and subscription sales staff
- need for specialist training targeted at magazine publishing (eg online publishing, management training, etc)
- no centralised source of information on courses available

Business Development

The most important factors in the development of the individual businesses were the sustaining of existing and developing new markets and staff skills. Developing new markets and the skills of staff were seen as particularly important by magazine publishing companies.

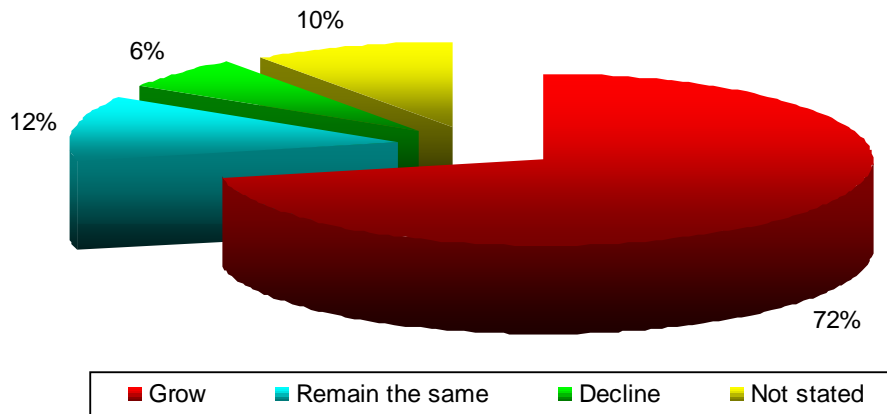
Legislation was perceived as one of the least important factors in business development and the quality of students/trainees was only perceived as important by 39 per cent of respondents.

Table Sixteen: per cent of respondents saying factors are very or quite important in development of business



Nearly three quarters of respondents anticipated that their magazine business would grow over the next three years, with only 6 per cent expecting it to decline. Publishers of business/professional magazines and specialist magazine publishers were more optimistic about growth than average.

Table Seventeen: Perceptions of business growth over next three years



Unprompted comments on factors affecting business growth focused on the difficulties of financing growth and the lack of government support for small businesses.

“There’s enterprise courses to start with, but no other help. Why doesn’t the Government do more to help small business?”

“We wanted help to buy a new office and got no support, but if we moved away and re-applied we would get a grant- it’s stupid.”

“For us, the difficulty of finding funding is the biggest obstacle to financial stability and growth.”

Specific issues mentioned confirmed the problems identified earlier in training for sales staff and the difficulties of persuading advertisers to use Scottish titles.

“We’re constrained by lack of experienced and trained staff.”

“It’s difficult to find good sales staff.”

The development of online services was mentioned as a key area of growth by a few respondents. The relatively small number of comments on this area, suggest that this is not yet seen as a major business development tool for magazine publishers.

“We anticipate online magazine earning us more revenue as we now allow for advertising budgets in that area.”

“The Internet appears to be a possible area for development alongside the publications.”

Comments on distribution’s role in the development of business confirmed the issues described earlier in the report.

“We’ve a problem with bookshops not taking magazines.”

“PPA should take a strong line with the main wholesalers to force them to concentrate on strong regional titles where appropriate.”

Overall Development of the Magazine Sector in Scotland

Half the respondents mentioned factors, unprompted, that were inhibiting the development of the Scottish magazine publishing sector. These comments focused on four key areas:

- **Distribution:** 15 per cent of respondents identified distribution as a key issue in the development of the magazine sector. The main issues were the cost of distribution and getting major national distributors, wholesalers and the supermarkets to take titles.

Comments showed that small publishers were particularly affected by distribution issues

“Marketing and distribution factors are highly prohibitive to a small, independent publisher.”

“Distribution of magazines is a problem, especially for new start-ups.”

“There is a lack of a cheap distribution network for small, independent publishers.”

Other comments illustrated the problems that all types of magazine publishers had in persuading distributors to stock their titles.

“We’re not able to access a comprehensive retail outlet network.”

“Distribution is a big issue – supermarkets never respond to stock requirements

“There’s increasing difficulties and costs of getting copies into shops for consumer titles.”

- **The limited market in Scotland** was an issue for around 10 per cent of respondents, with some organisations linking the area to issues with distribution over such a wide area.

“Relatively small market place over a wide geographical area.”

There were also several comments relating to the culture in Scotland not encouraging the development of business.

“The Scots lack confidence, there’s a lack of enterprise culture.”

“There’s not enough big clients in Scotland – too many ‘one man and his iMac’.”

- **Costs** of printing, marketing and postage were mentioned by 10 per cent of respondents as a problem for business development. Comments highlighted the fact that printing costs in Scotland were higher than in other areas of the UK.

“Printing costs in Scotland are an issue – no one in Scotland comes close to the English companies.”

- **Advertising** and the London-centric nature of the market was mentioned by 8 per cent of respondents.

“It’s hard to get advertisers to take you seriously if you’re not from London.”

“The perceived centre of publishing and advertising is London.”

- **Legislation** and the consequent problems with bureaucracy were identified by 5 per cent of respondents.

“Employment legislation is holding back small business’ growth potential.”

“Government form filling and bureaucracy is a major issue.”

APPENDIX ONE
QUESTIONNAIRE

**PERIODICAL PUBLISHERS ASSOCIATION
SURVEY OF SCOTTISH PUBLISHERS**

Please complete the questionnaire by **18th February 2005** by ticking the boxes or writing in your answer. If you are not able to answer a question, please go on to the next one.

All answers will be treated in confidence and results will be presented in aggregate form in order to ensure confidentiality.

SECTION ONE: ORGANISATION DETAILS

This section asks for details of your organisation: the information in this section will be entered onto a database for use by the Periodical Publishers Association to send out details of relevant events and publications. If you would like a copy of the summary of results of this survey, please tick the box at the end of the questionnaire.

Name of person completing the questionnaire _____

Position _____ Telephone _____

Name of organisation _____

Address _____

_____ Post code _____

Email address _____

Website address: www _____

What is the principal activity of your organisation?

Magazine Publishing	<input type="checkbox"/>	Public sector	<input type="checkbox"/>
PR/Advertising/Design/Marketing	<input type="checkbox"/>	Charity/voluntary organisation	<input type="checkbox"/>
Other media related	<input type="checkbox"/>	Professional institute/business organisation	<input type="checkbox"/>
Sports/leisure/tourism	<input type="checkbox"/>	Trade association	<input type="checkbox"/>
Financial services	<input type="checkbox"/>	Special interest group/association	<input type="checkbox"/>

If your main business activity is not listed, please write in your answer below

SECTION TWO: PUBLISHING ACTIVITIES

Q1 How many titles does your organisation publish in Scotland?

	Own publications	Contract publications	Total number
Magazine titles* - at least 2 issues per annum, sold or distributed independently. This includes customer, staff or member magazines	_____	_____	_____
Other titles – e.g. newsletters or directories	_____	_____	_____

Q2 Is your organisation involved in any of the following activities? Please tick all that apply

Books/Directories	<input type="checkbox"/>
Conferences	<input type="checkbox"/>
Events	<input type="checkbox"/>
Exhibitions	<input type="checkbox"/>
Other publications	<input type="checkbox"/>
Website/online	<input type="checkbox"/>

* Note: A magazine is defined as any journal that is published on a regular basis at least twice a year and not more frequently than once a week, and is sold or distributed independently of other publications. A customer, staff or member magazine is a magazine (not a brochure or newsletter or catalogue) published at least twice a year by or on behalf of an organisation to communicate with its customers. Newspaper supplements are not eligible



- Q3 For each **magazine** title included at Q1, please indicate:
- a) the number of issues per year
 - b) average print run (numbers)
 - c) average pagination
 - d) breakdown of areas of circulation (%)
 - e) ABC or BPA audited
 - f) printed in Scotland, elsewhere in the UK or overseas
 - g) where distributors are based
 - h) is the title available online

	a) Number of issues per year	b) Average print run			c) Average pagination	d) Breakdown of circulation %			Please tick boxes below						
		Paid	Unpaid	Total		Scotland	Other UK	Overseas	e) ABC/ BPA	f) Printers			g) Distributors		h) Online
Magazine title										Scotland	Other UK	Overseas	Scotland	Elsewhere	
1															
2															
3															
4															
5															
6															
7															
8															
9															

Please copy this sheet and continue if necessary

Q4 Please indicate which of the following functions you have in-house and which you outsource

	Outsourced			
	In-house	Scotland	England/Wales/ Northern Ireland	Overseas
Advertising/Sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Design/Production	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Editorial	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Photography	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Proof reading	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Subscription management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Website/online	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SECTION THREE: PROFILE OF ORGANISATION

Q5 How many staff does your organisation employ relating to magazine publishing in Scotland? Please write in the number of staff employed in each of the categories in the last financial year.

Full time _____
 Part time _____
 Total _____

Q6 What proportion of the total number of staff employed by your organisation does this represent?

_____ %

Q7 How many freelance staff have you used over the past 12 months? Please write in the number of different individuals

Q8 What was your organisation's turnover relating to magazine publishing in Scotland in the last financial year?

Under £50,000	<input type="checkbox"/>
£50,000 - £100,000	<input type="checkbox"/>
£101,000 - £250,000	<input type="checkbox"/>
£251,000- £500,000	<input type="checkbox"/>
£501,000 - £1 million	<input type="checkbox"/>
£1.1 million - £2 million	<input type="checkbox"/>
£2.1 million - £3 million	<input type="checkbox"/>
£3.1 million - £5 million	<input type="checkbox"/>
More than £5 million	<input type="checkbox"/>

Please write in your magazine turnover £ _____

Q9 What proportion of you total business turnover does the magazine turnover represent?

_____ %

SECTION FOUR: TRAINING AND STAFF DEVELOPMENT

Q10 How satisfied are you with the current availability of training for staff?

Very dissatisfied	<input type="checkbox"/>
Dissatisfied	<input type="checkbox"/>
No opinion	<input type="checkbox"/>
Satisfied	<input type="checkbox"/>
Very satisfied	<input type="checkbox"/>

Q11 In the first column, please indicate which types of training your organisation has been involved in over the past 12 months

Q12 In the second column please indicate if you perceive any gaps in the training currently available for your staff

	Q11 Training in past 12 months	Q12 Gaps in training
Administration	<input type="checkbox"/>	<input type="checkbox"/>
Advertising/Sales	<input type="checkbox"/>	<input type="checkbox"/>
Design/Print/Production	<input type="checkbox"/>	<input type="checkbox"/>
Editorial	<input type="checkbox"/>	<input type="checkbox"/>
Finance	<input type="checkbox"/>	<input type="checkbox"/>
Management	<input type="checkbox"/>	<input type="checkbox"/>
Subscriptions	<input type="checkbox"/>	<input type="checkbox"/>
Other - Please write in	<input type="checkbox"/>	<input type="checkbox"/>

Q13 Please write in any comments you have about the training/gaps in training currently available or not available

Q14 Are there any factors inhibiting the development of magazine publishing in Scotland?

Q15 How important are the following factors in the development of your magazine business?

	Not at all important	Not very important	Neither important nor unimportant	Quite important	Very important
Staff training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legislation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of students/trainees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of applicants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Developing new markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sustaining existing markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q16 Looking ahead to the next three years, are you expecting your magazine business to

Grow	<input type="checkbox"/>
Remain the same	<input type="checkbox"/>
Decline	<input type="checkbox"/>

Q17 Please write in any views you have on the development of your business

If you would like to be sent a summary of the results of the survey, please tick this box

APPENDIX TWO
THE PERIODICAL PUBLISHERS ASSOCIATION

The Periodical Publishers Association

The Periodical Publishers Association is based in London and has been promoting the interests of magazine publishers across the UK for over 90 years. It has an overall membership of 319 publishers producing 4,370 products and services as part of their magazine publishing activities. These include 2487 consumer, business and customer magazines, 201 exhibitions, 912 online services, 230 conferences and 266 directories. There are also more than 100 associate members plus five strategic partners.

PPA Scotland represents some 30 member organisations from the Scottish magazine and publishing industry and is chaired by Nick Creed, The Carnyx Group, Glasgow. PPA Scotland is administered by Kathy Crawford, PPA Scotland Business Manager.

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APPENDIX THREE
THE MAGAZINE INDUSTRY IN THE UK

THE MAGAZINE INDUSTRY IN THE UK

The £6bn Sector:

The consumer magazine industry is now valued at more than £2.96bn while business-to-business magazine publishing is estimated to be worth £3.1bn making a total of £6bn. The latest forecasts from the Advertising Association suggest ad spend in consumer and B2B magazines will increase.

Consumer magazines	£m
Advertising sales	784
Copy sales	1,977
Other	200
Business magazines	£m
Display advertising	588
Classified advertising	460
Copy sales	650
Exhibitions	400
Directories	300
Electronic products	300
Other	400
Customer magazines	366
Total:	6,425

Source: PPA, NOP Business, Advertising Association

Total number of magazine titles:

- Some different 8,466 magazine titles are published in the UK
- The total number of magazines titles published has increased by 24 per cent over the last 10 years

Number of business and consumer titles 1990-2004

	B2B	Consumer	Total
1990	4,541	2,184	6,725
1991	4,608	2,434	7,042
1992	4,469	2,301	6,770
1993	4,533	2,085	6,618
1994	4,586	2,112	6,698
1995	4,607	2,220	6,827
1996	4,628	2,329	6,957
1997	4,650	2,438	7,088
1998	5,151	2,794	7,945
1999	5,713	3,174	8,887
2000	5,545	3,275	8,820
2001	5,342	3,120	8,462
2002	5,208	3,130	8,338
2003	5,108	3,229	8,337
2004	5,142	3,324	8,466

Source: BRAD 2005

Magazine Markets:

The main markets in consumer magazines are

- **Sport** with 289 titles
- **Women's** magazines with around 60 titles

The big markets in the business press are

- **Business Management** 360 magazines
- **Architecture** and Building with 264 magazines
- **Computers** with 201 magazines

Magazine Revenue:

Consumer Magazines: 36% advertising / 64% circulation

B2B: 82% advertising / 18% circulation - many are free

Advertising income:

Magazines account for 17.8 per cent ad share. TV has been growing over the past 20 years but still only takes about 33 per cent share. Newspapers as a whole take about 60 per cent. This is a huge reversal from 10 years ago when both consumer and business magazines were closer to 50:50 in terms of the ad to circulation revenue

Consumer expenditure on magazines:

- Consumers spent £1,977m on magazines in 2003. This is an increase of 45 per cent in real-terms over the last decade, well ahead of both national and regional newspapers.

Consumer expenditure on magazines		
<u>Year</u>	<u>£m (2000 prices)</u>	<u>£m (actual)</u>
1991	1,009	834
1992	1,085	934
1993	1,216	1,073
1994	1,313	1,181
1995	1,443	1,333
1996	1,531	1,449
1997	1,752	1,688
1998	1,852	1,813
1999	1,718	1,705
2000	1,741	1,741
2001	1,849	1,872
2002	1,903	1,951
2003	1,903	1,977

The UK Publishing Sector:

- The industry has a turnover bigger than a lot of more visible sectors like pharmaceuticals
- There are around 10,500 employers - 85% small businesses.
- 185,000 employees - 42% work in larger companies employing more than 200 staff
- Over half of those employed are located in London and southeast
- More women (53%) than men (47%) are employed.
- The industry is full of well qualified graduates with high level of learning
- Huge use of freelance workforce - especially on the editorial side
- Online publishing is seen a revolution - but publishers are still working out business models which will bring a profit within the sector