

IRELAND



AT A GLANCE

Capital **Dublin**
Population **4,775,982** (July 2013 est.)
Median age **35.4**
GDP **US\$204.7 billion** (2012 est.)
Consumer prices 2012 **1.3%** (2012 est.)
Currency **Euro (EUR)**
Official language **English, Irish (Gaelic)**
Literacy rate **99%**

Source: CIA World Factbook (June 2013)

DIGITAL DATA

Internet penetration **3,627,462** (June 2012)
% of population **76**
Facebook penetration **2,183,760** (December 2012)
% of population **46**

Source: World Internet Stats

Mobile penetration **4,906,000** (2011)
% of population **103**

Source: CIA World Factbook (June 2013)

PRINT TAX

Sales VAT

Standard rate **23%**
Magazine & Newspaper **9%**
Books **0%**
Digital purchases (ie apps etc) **23%**

Source: Magazines Ireland

CROSS-MEDIA OWNERSHIP RESTRICTIONS

Owner registration
 Foreign ownership
 Cross-media ownership (In broadcast media)
 Concentration
 Concentration regulations planned?

allowed restricted not allowed

Source: Magazines Ireland

ADVERTISING RESTRICTIONS

Tobacco **!** Advertising to children **!**
Alcohol **!** Over-the-counter drugs **!**

! = banned by law
! = voluntarily stopped
! = restricted by law
! = restricted voluntarily

Source: Magazines Ireland

FIPP MEMBERS

NATIONAL ASSOCIATION

» Magazines Ireland

SPECIAL REPORT FROM:

MAGAZINES IRELAND

2013 continues to be a difficult year for the Irish economy in general with unemployment still high at almost 15%, and consumer spending low due to a lack of disposable income. Finance from the banking sector for businesses is extremely tight and this, coupled with a lack of support from the government for the magazine industry is a major impediment to the development and growth of Irish titles.

Irish magazine publishers are feeling the pressure from both newsstand sales and declining advertising revenues. However despite intense competition on the newsstand from imported titles, the Irish magazine market is doing relatively well and the latest ABC figures show Irish titles holding their own despite the difficult trading conditions. Most of the major consumer titles remained unchanged from the previous year with some increasing their circulations slightly.

Magazine publishers are working hard at retail level and concentrating on cover sales as a significant revenue stream for them because of the drop in advertising revenue on major brands, especially in the women's interest titles.

The publishing model has changed dramatically with a move away from advertising-led revenue streams to a greater focus on the consumer. Magazines Ireland has been active in promoting all of its members' titles with the multiples and with the independent retailers' associations. Most Irish-produced magazines are market leaders in their categories and are more relevant to Irish readers, reflecting the unique culture of Irish society. By joining forces Irish magazines are ensuring that Irish titles have a competitive edge on the newsstand. Brands are being promoted much more aggressively than previously, just to maintain sales. Link-Save promotions for complementary magazine titles as well as newspaper and magazine bundle offers have worked well and offer great value to the customer.

Aside from the recession, the biggest hurdle facing publishers now is how to

integrate print and online. Speaking at the second annual Magazines Ireland Publishing 360 conference on the future direction of the industry, Mediateam's Frank Quinn said that the balance is fast-changing. Print is not dead, but a tipping point has been reached and the results of the recent Eircom report on people's use of digital devices show that multi-screen use is the new norm. Changes in reading habits mean publishers have to continue to make strides into digital and social media and to focus on creating cross-platform delivery channels for their brands. While a lot of magazines are still in print, the trend is changing and finding a better balance is the priority for magazine publishers. The focus is on remodelling the business but the central challenge is having the cash and the staff to do it all properly. A lack of resources for investment has led to the Irish market falling behind.

Online strategy pays dividends

Although circulation figures for specialised B2B titles in markets like FMCG, business and healthcare are steady, revenues are still under pressure in the sector generally. The market remains challenging but publishers who made a decision to have an online strategy in place early on are seeing dividends. B2B publishers still have to work hard to maintain page yields and revenues in print but they are investing in new and exciting formats and seeking to build a multi-platform brand where a print edition complements further content online or a tablet application. Brand extensions such as events, conferences and awards ceremonies combined with customer publishing are some of the sectors into which publishers are expanding. Publishers need to be content providers primarily and a move is underway to a more 360-degree view of publishing.

New launches in both consumer and B2B are still happening but there have been some casualties in the last six months with three publishing companies going into liquidation.

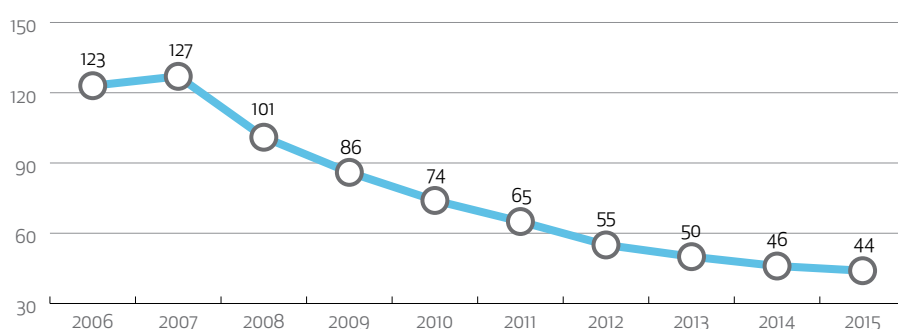
The prevailing economic climate is challenging enough for all publishers and

ADSPEND ZENITHOPTIMEDIA

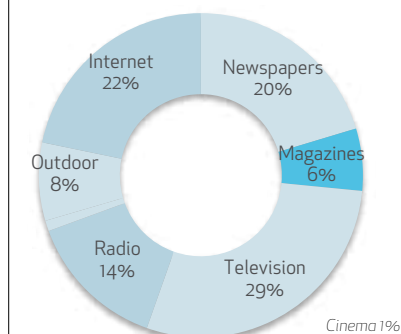
ADVERTISING EXPENDITURE BY MEDIUM (USD MILLION)

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
MAGAZINES	123	127	101	86	74	65	55	50	46	44
NEWSPAPERS	405	422	296	263	237	211	181	168	158	150
TELEVISION	313	359	288	276	295	273	257	259	268	279
RADIO	152	172	160	152	137	132	125	126	131	139
CINEMA	11	12	10	9	10	9	9	9	10	10
OUTDOOR	127	174	122	91	82	74	69	68	70	72
INTERNET	74	80	100	125	139	167	193	214	240	268
TOTAL	1,206	1,345	1,075	1,002	974	933	890	896	922	961

MAGAZINE ADSPEND GROWTH (USD MILLION)



ADSPEND SHARE (2012)



Source: ZenithOptimedia Advertising Expenditure Forecasts September 2013

CONSUMER

HIGHLIGHTS

	2008	2009	2010	2011	2012	2013
Number of copies sold or distributed in a year	25million	23million	22million	20million	20million	10million*

Source: ABC. * Data to 2012: included imparted titles. 2013 data: only Irish ABC titles

NUMBER OF TITLES

	2008	2009	2010	2011	2012	2013
Total	-	-	-	-	60	60
Paid for	-	-	-	-	-	90%
Free	-	-	-	-	-	10%

Source: MagazinesIreland

NUMBER OF PUBLISHERS

	2008	2009	2010	2011	2012	2013
Total	30	33	33	33	34	33

Source: MagazinesIreland

AVERAGE COVER PRICE: EUR

	2008	2009	2010	2011	2012	2013
Total	3.65	3.65	3.33	2.95	2.95	3.08

Source: ABC. Currency: EUR

they have had to invest major time and resources fending off further threats to the industry. As well as rising costs in paper, print and distribution they have had to deal with further possible advertising and sponsorship restrictions on alcohol products in magazines and increases in postal rates. The national postal service not only increased its rates by 12% and 16% (depending on the weight band) but it also introduced a new requirement for all Publication Services customers to produce a "manifest" that reflects the schedule of their publication distribution. This further introduction of zonal pricing from Feb 2013 was another attack

on magazine businesses, adding further increases in costs to the actual postal rates and extra costs for additional administration.

Healthy trends

Advertising forecasts for Irish media in 2013 while not amazing, are not particularly catastrophic either. Nielsen Ireland notes that trends are looking much healthier than the same period a year ago and it is hoping that there will be some modest growth in the advertising market in the second half of 2013.

Furthermore the latest Nielsen Consumer Confidence Index for Ireland (Q2 2013) shows an increase of five points which is the highest

index score since Q3 2008. Of the three components of the Nielsen Consumer Confidence Index there is increased positivity on personal finances and job prospects, however, readiness to spend remains unchanged. The biggest concerns in Ireland remain job security, the economy, and debt. Twenty-six per cent say they have "no spare cash" while the percentage of consumers putting spare cash into savings increases to 35%, showing the cautious mind-set. An increase to 69% of consumers say they are 'switching to cheaper grocery brands' to save money, with cut-backs also being made on lifestyle choices.

IRELAND

REVENUE SOURCES (%)

	2008	2009	2010	2011	2012	2013
Advertising	33	33	-	33	23	23
Copysales	67	67	-	67	74	73
Digital revenue	-	-	-	-	3	4

Source: Magazines Ireland

SALES DISTRIBUTION BREAKDOWN (%)

	2008	2009	2010	2011	2012	2013
Subscription	25	25	25	25	26	26
Retailsales	75	75	75	75	74	73
Free	-	-	-	-	-	1

Source: Magazines Ireland

NUMBER OF CONSUMER MAGAZINE WEBSITES

	2008	2009	2010	2011	2012	2013
Total	-	-	150	148	151	155

Source: Magazines Ireland

AVERAGE ISSUE READERSHIP (%)

MEN	65.0	WOMEN	81.0	ADULTS	73.0
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Source: Kantar Media's ROI TGI 2012. Adult: 15+

TOP PUBLISHING COMPANIES: BY NUMBER OF TITLES

1	Harmonia	6	Hot Press
2	Zahra Media Group	7	Irish Farmers' Journal (ICM)
3	VIP Group	8	Mediateam
4	Image Publications	9	Nalac
5	RTE Publishing	10	RSVP

Source: Magazines Ireland

TOP ADVERTISERS

1	Procter & Gamble Ireland	6	Regina
2	L'Oréal	7	Boots Ireland
3	Aldi Stores	8	98 Fm
4	Unilever Ireland	9	Spin Fm
5	Radio Nova	10	Coty

Source: Nielsen AdDynamix 2013

TOP ADVERTISER CATEGORIES

1	Radio Companies	6	Hotels / bed & breakfast
2	Womens skincare non-medicated	7	Supermarket and grocery chains
3	Cosmetics and make up	8	Furniture and furnishings
4	Restaurants/pubs/catering	9	Hair colourants
5	Jewellers	10	Women's fragrances and toiletries

Source: Nielsen AdDynamix 2013

TOP TITLES CONSUMER

PUBLISHER
FREQUENCY
CIRCULATION
AUDITED
AVERAGE READERSHIP
COVER PRICE
E-READER APPS
WEBSITE

BUSINESS/FINANCIAL/NEWS

Business Plus	Nalac	11 per year	10,262	Yes	-	2.50	No	bizplus.ie
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CHILDREN'S/COMICS/TEENAGE

Ni4Kids	Ni4Kids	Monthly	48,212	-	-	-	No	ni4kids.com
ireland4kids	Ni4Kids	5 per year	21,650	-	-	-	No	ireland4kids.ie
KISS	Minjara	11 per year	20,507	-	-	2.95	No	kiss.ie

FAMILY/PARENTING

Easy Parenting	Zahra Publishing	Quarterly	9,003	-	-	2.90	No	zahramediagroup.com
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FOOD/DRINK

Easy Food	Zahra Publishing	10 per year	21,260	-	-	2.90	Yes	zahramediagroup.com
Food & Wine	Harmonia	10 per year	8,607	-	-	3.80	No	harmonia.ie

GENERAL INTEREST

Irish Country Magazine	Irish Farmers' Journal	Seasonal	16,914	Yes	-	2.99	No	irishcountrymagazine.ie
Ireland of the Welcomes	Harmonia	Seasonal	-	Yes	-	-	No	harmonia.ie

HOME INTEREST

House and Home	Dyflin Media	6 per year	17,684	-	-	3.85	Yes	houseandhome.ie
Image Interiors & Living	Image Publications	6 per year	17,206	-	-	3.95	Yes	image-interiors.ie

TV GUIDES

RTE Guide	RTE Publishing	Weekly	61,881	-	-	1.75	No	rte.ie/ten
TVNow	Valigan	Weekly	27,190	-	-	1.30	No	tvnow.ie

TOP TITLES CONSUMER

	PUBLISHER	FREQUENCY	CIRCULATION	AUDITED	AVERAGE READERSHIP	COVER PRICE	E-READER APPS	WEBSITE
SPECIAL INTEREST								
Hot Press	Osnovina	Fortnightly	17,178	Yes	-	3.50	Yes	hotpress.com
The Phoenix	Penfield Enterprises	Fortnightly	14,013	Yes	-	2.85	No	phoenix.ie
Ireland's Wedding Journal	Penton	Quarterly	11,635	Yes	-	3.95	No	pentongroup.com
Gay Community News	GCN	Monthly	11,168	Yes	-	-	-	gcn.ie
Irish Field	Agricultural Trust	Weekly	11,117	Yes	-	3.10	-	irishfield.ie
The Irish Garden	Mediateam	11 per year	9,576	Yes	-	4.75	Yes	garden.ie
Irish Wedding Diary	Irish Wedding Diary	Quarterly	7,606	Yes	-	5.80	No	irishweddingdiary.ie
Confetti	Dyflin Media	Quarterly	7,072	Yes	-	5.80	No	confetti.ie
U Magazine	Harmonia	Seasonal	-	Yes	-	-	No	harmonia.ie

WOMEN'S MONTHLIES

Irish Tatler	Harmonia	11 per year	24,919	Yes	-	2.70	No	harmonia.ie
Image	Image Publications	Monthly	21,511	Yes	-	3.95	Yes	image.ie
Social & Personal	21st Century Media	11 per year	21,077	Yes	-	3.65	No	socialandpersonal.ie
Xpose	Zahra Media Group	Monthly	21,062	Yes	-	2.50	Yes	zahramediagroup.com
Stellar	Barndee Publishing	Monthly	21,012	Yes	-	2.20	No	stellar.ie
RSVP	RSVP Group	Monthly	17,075	Yes	-	1.95	No	rsvpmagazine.ie
Prudence	Dyflin Media	6 per year	11,441	Yes	-	2.85	No	prudece.ie
Ulster Tatler	Ulster Journals	Monthly	10,798	Yes	-	2.95	No	ulstertatler.com
IN ! Magazine	Harrison Publications	Monthly	5,716	Yes	-	2.90	No	in.com

WOMEN'S WEEKLIES

U Magazine	Harmonia	Fortnightly	27,819	-	-	1.70	No	harmonia.ie
Woman's Way	Harmonia	Weekly	22,120	-	-	1.39	No	harmonia.ie
VIP Magazine	Minjara	Fortnightly	20,048	-	-	1.95	No	vipmagazine.ie

MEN'S MONTHLIES/WEEKLIES

Irish Tatler Man	Harmonia	Seasonal	-	Yes	-	-	No	harmonia.ie
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Source: ABC. Currency: EUR

B2B

HIGHLIGHTS

	2008	2009	2010	2011	2012	2013
Number of copies sold or distributed	25 million	24 million	22 million	21 million	21 million	2 million*

Source: Magazines Ireland. * Data to 2012: included imported titles. 2013 data: only Irish ABC titles

NUMBER OF PUBLISHERS

	2008	2009	2010	2011	2012	2013
Total	28	28	28	28	28	28

Source: Magazines Ireland

NUMBER OF TITLES

	2008	2009	2010	2011	2012	2013
Total	-	266	266	266	261	260

Source: Magazines Ireland

DISTRIBUTION BREAKDOWN %

	2008	2009	2010	2011	2012	2013
Subscription	95	95	95	95	95	95
Retail sales	5	5	5	5	5	5

Source: Magazines Ireland

REVENUE SOURCES (%)

	2008	2009	2010	2011	2012	2013
Print ads	-	-	-	-	44	43
Copy sales	-	-	-	-	41	40
Digital	-	-	-	-	5	6
Events	-	-	-	-	10	11

Source: Magazines Ireland

NUMBER OF WEBSITES

	2008	2009	2010	2011	2012	2013
Total	-	-	155	160	164	166

Source: Magazines Ireland

IRELAND

TOP PUBLISHING COMPANIES: BY NUMBER OF TITLES

1	IFP Media	3	Mediateam	5	BMF Business Services	7	Think Media	9	ESCRS
2	Ashville Media Group	4	Automotive Publications	6	Danstone	8	Chartered Accountants Ireland	10	Law Society of Ireland

Source: Magazines Ireland

TOP ADVERTISERS

1	An Post	6	Irish Computer Society
2	Gallaher	7	Escrs
3	Mars Ireland	8	Cadbury
4	Pfizer	9	Novartis Consumer
5	Msd Animal Health	10	Oki

Source: Nielsen Ad Dynamix 2013

TOP ADVERTISER CATEGORIES

1	Agricultural supplies	6	Advertising, marketing, creative, market research
2	Medication general	7	Pharmaceutical corporate
3	Accountants and solicitors	8	Business and industrial
4	Cigarettes	9	Chocolate bars and countlines
5	Health and social general	10	Residential post office service

Source: Nielsen Ad Dynamix 2013

TOP TITLES B2B

PUBLISHER	FREQUENCY	CIRCULATION	AUDITED	AVERAGE READERSHIP	COVER PRICE	E-READER APPS	WEBSITE
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AGRICULTURE/FARMING

FarmWeek	Farm Week	Weekly	-	Yes	-	-	-	farmweek.ie
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AUTOMOTIVE INDUSTRIES

Autobiz	Autobiz	10 per year	5,175	Yes	-	-	-	autobiz.ie
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BANKING/FINANCIAL/INSURANCE/LEGAL

Accountancy Ireland	Chartered Accountants Ireland	6 per year	24,558	Yes	-	-	Yes	accountancyireland.ie
Business Eye	Buckley Publications	9 per year	7,411	Yes	-	-	-	businesseye.co.uk
Ulster Business	Greer Publications	11 per year	6,775	Yes	-	-	-	ulsterbusiness.com
agendaNI	bmf Business Services	9 per year	6,464	Yes	-	-	Yes	agendani.com

BUILDING/ENGINEERING/CONSTRUCTION

Construct Ireland/Passive House Plus	Temple Media	5 per year	7,223	Yes	-	-	Yes	constructireland.ie
Specify	Greer Publications	6 per year	3,926	Yes	-	-	-	specify.co.uk

HEALTHCARE/MEDICAL/PHARMACEUTICAL

EuroTimes	ESCRS	Monthly	37,563	Yes	-	-	Yes	eurotimes.org
Irish Medical News	Danstone	Weekly	7,448	Yes	-	-	Yes	imn.ie
Journal of the Irish Dental Association	Think Media	6 per year	3,366	Yes	-	-	Yes	dentist.ie/journal
Irish Medical Times	Medical Publications	Weekly	-	-	-	-	-	imt.ie

RETAIL

Shelflife	Mediateam	11 per year	7,795	Yes	-	-	Yes	shelflife.ie
Retail News	Tara Publishing	10 per year	5,620	Yes	-	-	No	retailnews.ie
Checkout Ireland	Checkout Publications	Monthly	5,267	Yes	-	-	No	checkout.ie
Licensing & Catering News	Penton Publications	9 per year	4,984	Yes	-	-	No	pentongroup.com
Neighbourhood Retailer	Penton Publications	11 per year	4,616	Yes	-	-	No	pentongroup.com
Ulster Grocer	Greer Publications	10 per year	4,517	Yes	-	-	No	greerpublications.com
Hospitality Review	Greer Publications	10 per year	4,472	Yes	-	-	No	greerpublications.com
Ireland's Forecourt and Convenience Retailer	Penton Publications	5 per year	4,253	Yes	-	-	No	pentongroup.com

Source: Magazines Ireland. Currency: EUR