

# IRELAND

## > FIPP MEMBERS

### NATIONAL ASSOCIATION

» Magazines Ireland

## > AT-A-GLANCE

Capital: **Dublin**  
Population: **4,832,765** (July 2014 est.)  
Median age: **35.7 years**  
GDP: **US\$220.9 billion** (2013 est.)  
Consumer prices: **0.6%** (2013 est.)  
Currency: **Euro (EUR)**  
Official language: **English, Irish** (Gaelic)  
Literacy rate: **99%**  
SOURCE: CIA WORLD FACTBOOK (JULY 2014)

### DIGITAL DATA

Internet penetration: **3,817,491**  
% of population: **79**  
SOURCE: INTERNET LIVE STATS (JULY 2014 EST.)  
Mobile penetration: **4,906,000** (2012)  
% of population: **102**  
SOURCE: CIA WORLD FACTBOOK (JULY 2014)

### PRINT TAX

> **VAT**  
Standard rate: **23%**  
Magazine and newspaper purchases: **9%**  
Books: **0%**  
Digital purchases: **23%**  
Tax on advertising: **23%**  
SOURCE: MAGAZINES IRELAND

### CROSS-MEDIA OWNERSHIP RESTRICTIONS

- owner registration
- foreign ownership
- cross-media ownership
- concentration

Key: ■ ALLOWED  RESTRICTED ■ NOT ALLOWED

SOURCE: MAGAZINES IRELAND

### ADVERTISING RESTRICTIONS

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

Key: ■ BANNED BY LAW  VOLUNTARILY STOPPED  
■ RESTRICTED BY LAW  RESTRICTED VOLUNTARILY

SOURCE: MAGAZINES IRELAND

## > SPECIAL REPORT: MAGAZINES IRELAND

With all the economic fundamentals pointing in the right direction, advertising spend in Ireland is likely to rebound by 2.7% in 2014 according to the June 2014 *Advertising Expenditure Forecasts*, which is published by media agency ZenithOptimedia.

It is the first growth the domestic advertising market has experienced since 2007 and although it is still modest, it is the second highest level of growth in Europe, with only Belgium likely to achieve a growth rate greater than Ireland's. The agency is also forecasting that the Irish ad market will continue to grow over the coming years with forecasts of 4.5% and 6.6% for 2015 and 2016 respectively.

Not surprisingly, digital advertising, specifically mobile, will drive this growth. Consumers are spending more and more time online and advertisers and marketers are becoming more confident in its role within the media mix.

Internet adspend in Ireland will reach the same levels as TV for the first time ever in 2014 according to ZenithOptimedia. By 2015, however, online adspend in Ireland will overtake TV and by 2016 it will account for a whopping 32% of advertising spend, a significant increase on 2013, when it accounted for 25.5%.

Magazine brands work well online as it means they can now communicate with their target audience on a continuous basis. Online is not only providing magazine publishers with an alternative advertising source but it is also a means of promoting the printed product, resulting in extra copy sales when it hits the shelf.

While magazine publishers need to be active on the online front, major questions about returns from digital investments still remain. Digital revenues are growing, particularly for B2B titles, but still haven't made up for the drop-off in print revenues at many media companies. For publishers that have been trying to protect their legacy print business while investing cautiously in digital, decisions on when and how to shift more resources toward growth channels are taking on greater urgency. Most publishers now have a diversified portfolio of products and

services that generate either advertiser or reader revenue. One high-growth area of marketing services is native advertising. As brands' interest in native advertising grows, publishers have an opportunity to offer services not just for hosting these native ads, but for helping brands develop the content that goes into them. Publishers are also continuing to explore new ways to "skin the pig" – maximising their editorial by repurposing content in different formats for different channels.

The prevailing economic climate is still challenging enough for publishers and they have also 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 increases in postal rates. The national postal service not only increased its rates by 13% and 8% in July 2014 (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 introduction of zonal pricing was a further attack on magazine businesses adding further increases in costs to the actual postal rates as well as extra costs for additional administration.

However in spite of intense competition on the newsstand from imported titles the Irish magazine market is doing well and the latest ABC figures show Irish titles holding their own. It's an exciting time for the magazine business and Irish magazines continue to dominate their respective markets.

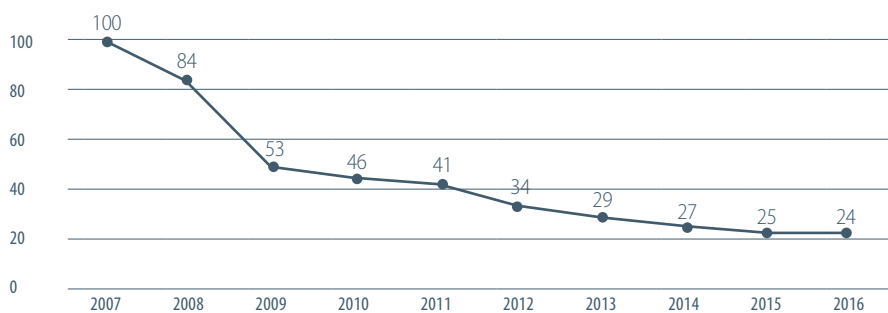
Innovative new product launches including *Taste* from RTE Guide and *BASH* from Image Publications, and exciting developments on digital platforms enable us to deliver the highest quality content to our audiences and advertisers across every dimension. With the market showing signs of positive momentum and 2014 anticipated to be the year when the market will finally move out of recession, we look forward to new launches and more brand extensions from our members.

## > ADSPEND: ZENITHOPTIMEDIA

### ADVERTISING EXPENDITURE BY MEDIUM (USD MILLIONS)

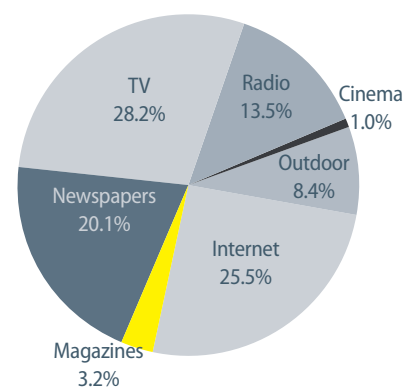
	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Magazines	100	84	53	46	41	34	29	27	25	24
Newspapers	519	438	312	279	246	210	181	164	156	151
Television	412	315	303	299	283	266	254	262	273	286
Radio	186	173	163	146	137	129	121	126	134	143
Cinema	12	10	9	10	10	10	9	10	10	10
Outdoor	206	149	110	80	77	72	76	78	80	84
Internet	103	126	146	163	186	207	229	257	287	330
<b>Total</b>	<b>1,538</b>	<b>1,294</b>	<b>1,096</b>	<b>1,023</b>	<b>978</b>	<b>927</b>	<b>899</b>	<b>923</b>	<b>965</b>	<b>1,029</b>

### MAGAZINE ADSPEND (USD MILLIONS)



Source: ZenithOptimedia Advertising Expenditure Forecasts June 2014

### ADSPEND SHARE (2013)



## > HIGHLIGHTS

### NUMBER OF COPIES

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

Source: ABC. \* Data to 2012: included imported titles; 2013 data onwards: only Irish ABC titles

### NUMBER OF PUBLISHERS

	2009	2010	2011	2012	2013
Total	33	33	33	34	33

Source: Magazines Ireland

### NUMBER OF CONSUMER MAGAZINE WEBSITES

	2009	2010	2011	2012	2013
Total	-	150	148	151	155

Source: Magazines Ireland

### DISTRIBUTION BREAKDOWN (%)

	2009	2010	2011	2012	2013
Subscription	25	25	25	26	26
Retail sales	75	75	75	74	73
Free circulation	-	-	-	-	1

Source: Magazines Ireland

### NUMBER OF TITLES

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

Source: Magazines Ireland

### AVERAGE COVER PRICE: EUR

	2009	2010	2011	2012	2013
Total	3.65	3.33	2.95	2.95	3.08

Source: ABC

### REVENUE SOURCE (%)

	2009	2010	2011	2012	2013
Print ads	33	-	33	23	23
Copy sales	67	-	67	74	73
Digital revenue	-	-	-	3*	4*

Source: Magazines Ireland; \*includes digital copy sales

# IRELAND CONSUMER

## > HIGHLIGHTS

### TOP PUBLISHERS: BY NUMBER OF TITLES

1	Harmonia	6	RTE Publishing
2	Zahra Media Group	7	Hot Press
3	Image	8	Mediateam
4	256 Media	9	Irish Farmers Journal
5	Meadiavault	10	Business Plus

Source: Magazines Ireland

### RETAIL OUTLETS

	2009	2010	2011	2012	2013
Kiosk/newsstand	-	-	-	-	3,800

Source: Magazines Ireland

### AVERAGE ISSUE READERSHIP (%)

MEN **60** WOMEN **77** ADULTS **69**

Source: Kantar Media's ROI TGI 2013; Adults 15+

### TOP ADVERTISERS

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

Source: Nielsen April 2014

### TOP ADVERTISER CATEGORIES

1	Radio companies	6	Restaurants, pubs and catering
2	Womens skincare non-medicated	7	Cosmetics and make up
3	Furniture and furnishings	8	Supermarket and grocery chains
4	Hotels, B&B	9	Hair products range
5	Jewellers	10	Women's fashion

Source: Nielsen April 2014

## > TOP TITLES

	PUBLISHER	FREQUENCY	CIRCULATION	AUDITED	AVERAGE READERSHIP	COVER PRICE	E-READER APPS	WEBSITE
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### BUSINESS/FINANCIAL/NEWS

Business Plus	Nalac	Monthly	10,192	Yes	-	2.50	Yes	bizplus.ie
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### CHILDREN'S/COMICS/TEENAGE

Ni4Kids	Ni4Kids	Monthly	60,752	Yes	-	-	No	ni4kids.com
Kiss	Minjara	11 per year	16,003	Yes	-	2.95	No	kiss.ie

### FAMILY/PARENTING

Easy Parenting	Zahra Publishing	6 per year	7,521	Yes	-	2.00	Yes	zahramediagroup.com
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### FOOD/DRINK

Easy Food	Zahra Publishing	11 per year	20,021	Yes	-	2.90	Yes	zahramediagroup.com
Woman's Way Cookbook	Harmonia	Quarterly	10,525	Yes	-	1.99	Yes	harmonia.ie
Food & Wine	Harmonia	11 per year	7,921	Yes	-	3.80	Yes	harmonia.ie

### GENERAL INTEREST

Ireland of the Welcomes	Harmonia	6 per year	22,463	Yes	-	3.50	Yes	harmonia.ie
Irish Country Magazine	Irish Farmers' Journal	6 per year	15,888	Yes	-	2.99	Yes	irishcountrymagazine.ie

### HOME INTEREST

House and Home	256 Media	6 per year	17,684	Yes	-	3.85	Yes	houseandhome.ie
Image Interiors & Living	Image Publications	6 per year	17,291	Yes	-	3.95	Yes	image-interiors.ie

# IRELAND: CONSUMER

## > TOP TITLES

	PUBLISHER	FREQUENCY	CIRCULATION	AUDITED	AVERAGE READERSHIP	COVER PRICE	E-READER APPS	WEBSITE
<b>MEN'S MONTHLIES/WEEKLIES</b>								
Irish Tatler Man	Harmonia	3 per year	4,948	Yes	-	-	Yes	harmonia.ie

## SPECIAL INTEREST

U Magazine Ultimate Girls' Guide to Absolutely Everything	Harmonia	2 per year	17,681	Yes	-	1.70	Yes	harmonia.ie
Hot Press	Osnovina Ltd	Fortnightly	17,239	Yes	-	3.50	Yes	hotpress.com
The Phoenix	Penfield Enterprises	Fortnightly	14,013	Yes	-	2.85	No	phoenix.ie
Irish Field	Agricultural Trust	Weekly	10,741	Yes	-	3.20	-	irishfield.ie
Gay Community News	GCN	Monthly	10,269	Yes	-	-	-	gcn.ie
The Irish Garden	Mediateam	Monthly	8,378	Yes	-	4.75	Yes	garden.ie

## TV GUIDES

RTE Guide	RTE Publishing	Weekly	57,062	Yes	-	1.80	Yes	rte.ie
TVNow!	Valigan Ltd	Weekly	24,511	Yes	-	1.30	Yes	tvnow.ie

## WEDDING/BRIDAL

Ireland's Wedding Journal	Penton	Quarterly	10,861	Yes	-	3.95	Yes	weddingjournal.ie
Confetti	256 Media	Quarterly	7,072	Yes	-	5.80	Yes	confetti.ie
Bash	Image Publications	8 per year	3,737	Yes	-	6.95	Yes	bash.ie

## WOMEN'S MONTHLIES

Irish Tatler	Harmonia	Monthly	23,057	Yes	-	2.70	Yes	harmonia.ie
Image	Image Publications	Monthly	22,371	Yes	-	3.95	Yes	image.ie
VIP Magazine	Minjara Ltd	Monthly	21,252	Yes	-	1.95	Yes	vipmagazine.ie
Social & Personal	21st Century Media	11 per year	20,693	Yes	-	3.65	Yes	socialandpersonal.ie
Stellar	Barndee Publishing	Monthly	18,353	Yes	-	1.95	Yes	stellar.ie
Xpose	Zahra Media Group	11 per year	17,305	Yes	-	2.50	Yes	zahramediagroup.com
Ulster Tatler	Ulster Journals	Monthly	10,842	Yes	-	2.95	Yes	ulstertatler.com

## WOMEN'S WEEKLIES

U Magazine	Harmonia	Fortnightly	22,585	Yes	-	1.70	Yes	harmonia.ie
Woman's Way	Harmonia	Weekly	21,321	Yes	-	1.39	Yes	harmonia.ie

Source: Magazines Ireland; Currency: EUR

# IRELAND: B2B

## > HIGHLIGHTS

### NUMBER OF COPIES

	2009	2010	2011	2012	2013
Number of copies sold and/or distributed in a year	24 million	22 million	21 million	21 million	2 million*

Source: ABC. \* Data to 2012: included imported titles; 2013 data onwards: only Irish ABC titles

### NUMBER OF PUBLISHERS

	2009	2010	2011	2012	2013
Total	28	28	28	28	28

Source: Magazines Ireland

### NUMBER OF B2B MAGAZINE WEBSITES

	2009	2010	2011	2012	2013
Total	-	155	160	164	166

Source: Magazines Ireland

### DISTRIBUTION BREAKDOWN (%)

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

Source: Magazines Ireland

### TOP PUBLISHERS: BY NUMBER OF TITLES

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

Source: Magazines Ireland

### RETAIL OUTLETS

	2009	2010	2011	2012	2013
Kiosk/newsstand	-	-	-	-	3,800

Source: Magazines Ireland

### NUMBER OF TITLES

	2009	2010	2011	2012	2013
Total	266	266	266	261	260

Source: Magazines Ireland

### REVENUE SOURCE (%)

	2009	2010	2011	2012	2013
Print ads	-	-	44	43	43
Digital ads	-	-	5*	6*	4*
Copy sales	-	-	41	40	40
Digital copy sales	-	-	-	-	2
Exhibitions and events	-	-	10	11	11

Source: Magazines Ireland; \*includes digital copy sales

### TOP ADVERTISERS

1	Novartis Consumer	6	Msd Animal Health
2	Gallaher	7	Bayer
3	Jt Intl	8	The Menarini Group
4	American Soc Cataract Refractive	9	Glaxosmithkline Ireland
5	Escrs	10	An Post

Source: Nielsen April 2014

### TOP ADVERTISER CATEGORIES

1	General medications	6	Accountants and solicitors
2	Agricultural supplies	7	Pharmaceutical corporate
3	Health, social general	8	Engines, parts and components
4	Cigarettes	9	Business and industrial
5	Advertising, marketing, creative and market research	10	Tyres

Source: Nielsen April 2014

## > TOP TITLES

	PUBLISHER	FREQUENCY	CIRCULATION	AUDITED	AVERAGE READERSHIP	COVER PRICE	E-READER APPS	WEBSITE
<b>AGRICULTURE/FARMING</b>								
Farmweek	Farmweek	Weekly	8,827	Yes	-	-	Yes	farmweek.ie
<b>AUTOMOTIVE INDUSTRIES</b>								
Aitobiz	Aitobiz	10 per year	5,471	Yes	-	-	Yes	aitobiz.ie
<b>BANKING/FINANCIAL/INSURANCE/LEGAL</b>								
Accountancy Ireland	Chartered Accountants Ireland	6 per year	26,103	-	-	-	Yes	accountancyireland.ie
Business Eye	Buckley Publications	7 per year	7,333	-	-	-	Yes	businessseye.co.uk
Ulster Business	Greer Publications	11 per year	6,614	-	-	-	Yes	ulsterbusiness.com
Agenda Ni	BMF Business Services	6 per year	5,484	-	-	-	Yes	agendani.com

# IRELAND: B2B

## > TOP TITLES

	PUBLISHER	FREQUENCY	CIRCULATION	AUDITED	AVERAGE READERSHIP	COVER PRICE	E-READER APPS	WEBSITE
<b>BUILDING/ENGINEERING/CONSTRUCTION</b>								
Passive House Plus	Temple Media	Quarterly	6,430	-	-	-	Yes	passivehouseplus.ie
Specify	Greer Publications	5 per year	3,731	-	-	-	Yes	specify.co.uk
<b>HEALTHCARE/MEDICAL/PHARMACEUTICAL</b>								
Eurotimes	ESCRS	10 per year	40,878	-	-	-	Yes	escrs.org
Irish Medical News	Danstone	Weekly	7,563	-	-	-	Yes	imn.ie
Irish Medical Times	Medical Publications	Weekly	7,135	-	-	-	Yes	imt.ie
Journal Of Irish Dental Association	Think Media	Annually	3,499	-	-	-	Yes	thinkmedia.ie
<b>RETAIL</b>								
Shelflife	Mediateam	Monthly	7,765	-	-	-	Yes	shelflife.ie
Retail News	Ocean Publishing	10 per year	6,364	-	-	-	Yes	retailnews.ie
Checkout	Checkout Publications	Monthly	5,247	-	-	-	Yes	checkout.ie
Licensed & Catering News	Penton Publications	8 per year	4,856	-	-	-	Yes	pentongroup.com
Neighbourhood Retailer	Penton Publications	9 per year	4,698	-	-	-	Yes	pentongroup.com
Hospitality Review Ni	Greer Publications	10 per year	4,556	-	-	-	Yes	greerpublications.com
Ulster Grocer	Greer Publications	10 per year	4,402	-	-	-	Yes	greerpublications.com
Ireland'S Forecourt & Convenience Retailer	Penton Publications	6 per year	4,252	-	-	-	Yes	pentongroup.com

Source: Magazines Ireland; Currency: EUR