

A media market update – an in-depth look at what's been happening in Print

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Revenue forecast for 2017 -9%

The highest spending category in January was Travel and Transport which had a 13% increase year-on-year, due to seasonal sale strategies increasing advertising spend. In the magazine market, Conde Nast are up 2% YoY, N&S up 19% and Stylist up 13%, similarly due to increased activity from their core clients in Cosmetic and Retail sectors as they boost winter sale budgets.

In the National Press market, Times Ad Revenue was up by an impressive 12% in January and The I is up 8%, also largely due to winter sale and promo adverts, and interestingly, whilst seeing an Ad Revenue decline, Trinity Mirror Group have just reported a 14% pre-tax profit growth.

Telegraph quadruples the size of its programmatic ad team

Despite being relatively new to header bidding (a method that allows buyers to bid simultaneously on a publisher's digital inventory) the Telegraph has seen a 20% growth in its overall programmatic revenue. The Telegraph now plans to reinvest the profits by expanding its programmatic staff count in order to plug any gaps in expertise.

This year the team will expand to 12 people to include analysts and partnership managers who can work on potential partners. The publisher also plans to increase its programmatic efforts internationally, and the new staff hire will help support multiple platforms including: native, mobile and desktop web, apps, videos and third parties.

To gain the most out of header bidding, publishers are increasingly turning to analysts who can easily navigate the complexities of the current bidding landscape. In recent months, both the Daily Mail and Trinity Mirror have introduced more analysts to their programmatic teams.

ABC July-December 2016 Highlights

The News weekly market has dominated the recent ABC's with combined print and digital editions up 3.4% PoP. This was the strongest category in the magazine sector, which does not come as a surprise given consumers are seeking more information in light of current affairs. The Private Eye has successfully managed to reverse the previous decline and has posted the largest increase in Print circulations, up 9.1% PoP. The Spectator has also continued to increase its circulations across print and digital, with a 9.7% increase.

The closure of Coach and Sport late last year skewed the overall circulation figures for the free weeklies, with other titles holding their position or seeing a positive increase. Balance remained relatively flat in the freemium sector with an ABC figure of 0.6% PoP, whilst NME continues to climb with a distribution increase of 0.2%. NME are set to unveil some subtle editorial changes in the coming months, which will reinforce the brand's commitment to new music discovery. If we exclude Coach and Sport, total market performance is positive, up 0.2% YoY.

Whilst Celebrity and Fashion weeklies have collectively seen a year-on-year circulation decrease of 15.4%, Stylist's combined print and digital figures have remained relatively flat. This may be a result of the title investing heavily into their digital portfolio, offering more targeted display advertising using a DMP. When we focus on mobile unique users and Facebook Likes, OK! has stayed at the top of the Celeb Weekly market, with a 5.2% PoP increase in print and digital circulations combined.

NME on NRS

Over the past 15 months NME has adapted its editorial content to reflect the change in its readership demographic.

The recent NRS data has unveiled a fresh audience profile which is older than Time Inc. and agencies alike had perhaps originally anticipated with an average age of 32. The audience is also more affluent with a diverse range of interests – highlighting who their distribution model is hitting. These interests are now shaping the editorial direction of the title, with content covering the latest film and album releases to the latest news on the Trump saga.

This change in readership demographic has also given NME the opportunity to innovate and adapt not just editorially but commercially, including new partnership solutions with Google, Apple Music and VO5.

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