

MEDIA RELEASE

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*** Please note: All figures quoted are Australian Average Net Paid Sales per Issue
All comparisons are year-on-year unless otherwise stated
Total Market analysis covers consumer magazines predominately available at the
newsstand**

MAG BUYERS STAY AT HOME BASE...

Lifestyle, leisure and motor vehicle topics dominated the interest and purchase habits of consumer magazine buyers according to the Audit Bureau of Circulations figures for the half to December 2002, reflecting the increasingly home-based culture of Australians, regularly noted by researchers and retailers last year.

NDD which manages the retail sales of 1,200 titles in the Australian market represented 28 of the 147 magazines whose circulation figures were published by the Audit Bureau of Circulations for the six months to December 2002. Of those titles 75% experienced sales increases and in total increased by 9%

In a relatively sales static market, categories to improve their position included **Health and Fitness, Living, Fashion, Car Enthusiast** and **Fishing**.

Biggest falls came in the **Business, Computer, Children, Teen** and **Sports** categories.

The number of titles auditing rose from 124 a year ago to 147 driving total market sales for the period up 1% to 111 million, an increase of just over 1.2 million. An additional 31 titles audited during the period. These new and re-entering titles contributed 3.4 million sales, offset by the 1.8 million sales taken with the eight titles that dropped out and leaving a net decrease of 0.4 million copies for the 116 titles which appeared in both audits.

There were some notably good and bad individual performers. **Burke's Backyard**, supported by the integrated, high-rating TV program lifted sales by an average 18,000 per issue, offsetting the combined average of 22,863 copies per issue shed by three of its competitors. **Gardening Australia**, also with its own TV show but with a more pure gardening focus, did best of the rest losing only 2439 copies.

Vogue Living, up 6,465 year-on year, the TV-supported **Better Homes & Gardens**, plus 3749 and the 5,199 increase of Australian **House & Garden** were the only three titles to significantly lift in the nine-magazine **Living** section.

The **RM Williams'** Rural Lifestyle bi-monthly lifted 15,566 per issue to 60,275 but is still capturing only half the total sales of **Australian Country Style's** monthly 61,029.

Car Enthusiast category saw **Wheels** lift 9,931 and **Motor** 7,765 assisted by new Ford and Holden launches in the period. In the specialist area, **Street Machine** rose by 8,000 and **Fast Fours** by 3,917 while **Australian 4WD Monthly's** 5,464 and **Overlander 4WD's** 2,627 read in conjunction with the 28,000 combined average sales of Caravan **World** and **Caravans & Motorhomes** confirm the upsurge in local travel interest prompted by global uncertainty.

B magazine, despite a return to A4 format from its "handbag" experiment was the top overall loser in volume terms, down by 34,948 copies per issue year-on-year but steadied from June onwards. Its ACP competitors for the **Young Women's** market, **Cleo** and **Cosmopolitan** were also both down slightly on the year and sold neck-and-neck in the mid 204,000s.

Runaway **Children's** market leader **K-Zone** lost 17,427 per issue and audited at 117,573, **Winnie the Pooh** lost 3,455 and **Disney Adventures** 3,457. **K-Zone's** publisher Pacific increased competition in the category launching **Total Girl** and **Cartoon Network** late in the period and its non-auditing competitor **DMAG** is now in supermarkets

The soft year in the worldwide computer market showed in the falls of **Australian PC World** (-9565) and **Australian Personal Computer** (-9188). **Australian Net Guide** lifted 2258 and the major gaming titles did not audit.

Inside Sport lost 19,056 purchasers per month, **Australian Golf Digest**, **Fishing World** and **Modern Fishing** all registered increases, and in **Men's Lifestyle**, **FHM** with a 5,804 lift to 102,207 sneaked past the more down market **Ralph** by 730 copies.

In the mass market, **Australian Women's Weekly** retained its mantle as top seller at 695,108 a month, despite a 12,625 year-on-year drop. Weekly rivals **Woman's Day** and **New Idea** were slightly up, **Who Weekly** lost 30,514 year-on-on to 141,019 and **NW** picked up 7,461, rising past **Who Weekly** to audit 151,063. **Take 5** at 247,809 continued to close on **That's Life's** 390,151.

Food & Wine remained strong with **delicious** (88,844) and **Donna Hay** (78,105) entering the audit year-on-year and bettering their June 2002 entry figures. **Australian Good Taste**, up 1972, did best of the incumbents while **SuperFood Ideas** after extraordinary previous growth plateaued at 350,582, down 10,629.

Kerry Packer's ACP Publishing continued to dominate the market with a 48% per cent share of the market, followed by Kerry Stokes' Seven Network-owned Pacific on 20%, Time Inc South Pacific (bolstered by **English Woman's Weekly**) at 6.5% and the IPMG-owned FPC at 6 per cent.

New rules, limiting the inclusion of bulk sales were applied by the ABC for the first time in this audit.

ABOUT NDD

NDD distributes and markets magazines to more than 10,850 retail outlets and 13,000 sub-agents throughout Australia. NDD leads the field in innovation, information analysis and dissemination, marketing strategies, technology initiatives and retailer relationships. Further information: www.newsdirect.com.au

NDD is a 100% owned subsidiary of the Independent Print Media Group (IPMG), based in Alexandria, NSW. IPMG is a privately owned partnership between the Hannan and Fairfax families. IPMG is ranked by *BRW* as the 44th most profitable private company in Australia.

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