



nielsen

AN UNCOMMON SENSE
OF THE CONSUMER™

THE MAGAZINE MARKET

MAGAZINE PUBLISHERS ASSOCIATION
OF NEW ZEALAND

NIELSEN CONSUMER AND MEDIA
INSIGHTS (CMI)
Q4 2014 – Q3 2015



EXECUTIVE SUMMARY

READERSHIP CHANGES

- AA Directions maintains its number one rank as the most read title in the top 10, reaching over half a million New Zealanders aged 10+. SkyWatch is in second place, followed closely by NZ Woman's Weekly
- Habitat, NZ Life & Leisure, Bride & Groom and Simply You Living experienced significant readership increases year-on-year by 21%, 21%, 22% and 42% respectively
- More than half of the magazine categories experienced a decline in readership. The Motoring category had the greatest drop by 19 percentage points, this was largely due to AA Directions being moved from the Motoring category to General Interest category

ADVERTISING SPEND

- The number one category for total advertising spend is Toiletries/ Cosmetics
- Home Improvements is the only category within the top 10 to have advertising spend increase year-on-year
- Unilever Australia is the top spending advertiser overall this year and has increased its advertising spend by 11% year-on-year. The Bradford Exchange and BDM Grange are the two advertisers to have the largest percentage growth in advertising spend in magazines compared to the same period a year ago

TITLES WITH SIGNIFICANT INCREASES

PUBLICATION TITLES	AVERAGE ISSUE READERSHIP Q4 2014 - Q3 2015	% CHANGE YEAR ON YEAR (YOY)
Titles with 200,000+ Readers		
HABITAT	212,000	21%
Titles with 100,000 – 199,000 Readers		
NZ LIFE & LEISURE	148,000	21%
Titles with <100,000 Readers		
BRIDE & GROOM	94,000	22%
SIMPLY YOU LIVING	92,000	42%



OF THE 70 TITLES RELEASED ON THE SURVEY, 4 HAVE SEEN SIGNIFICANT INCREASES YEAR ON YEAR WITH SIMPLY YOU LIVING HAVING THE LARGEST YEAR-ON-YEAR PERCENTAGE INCREASE

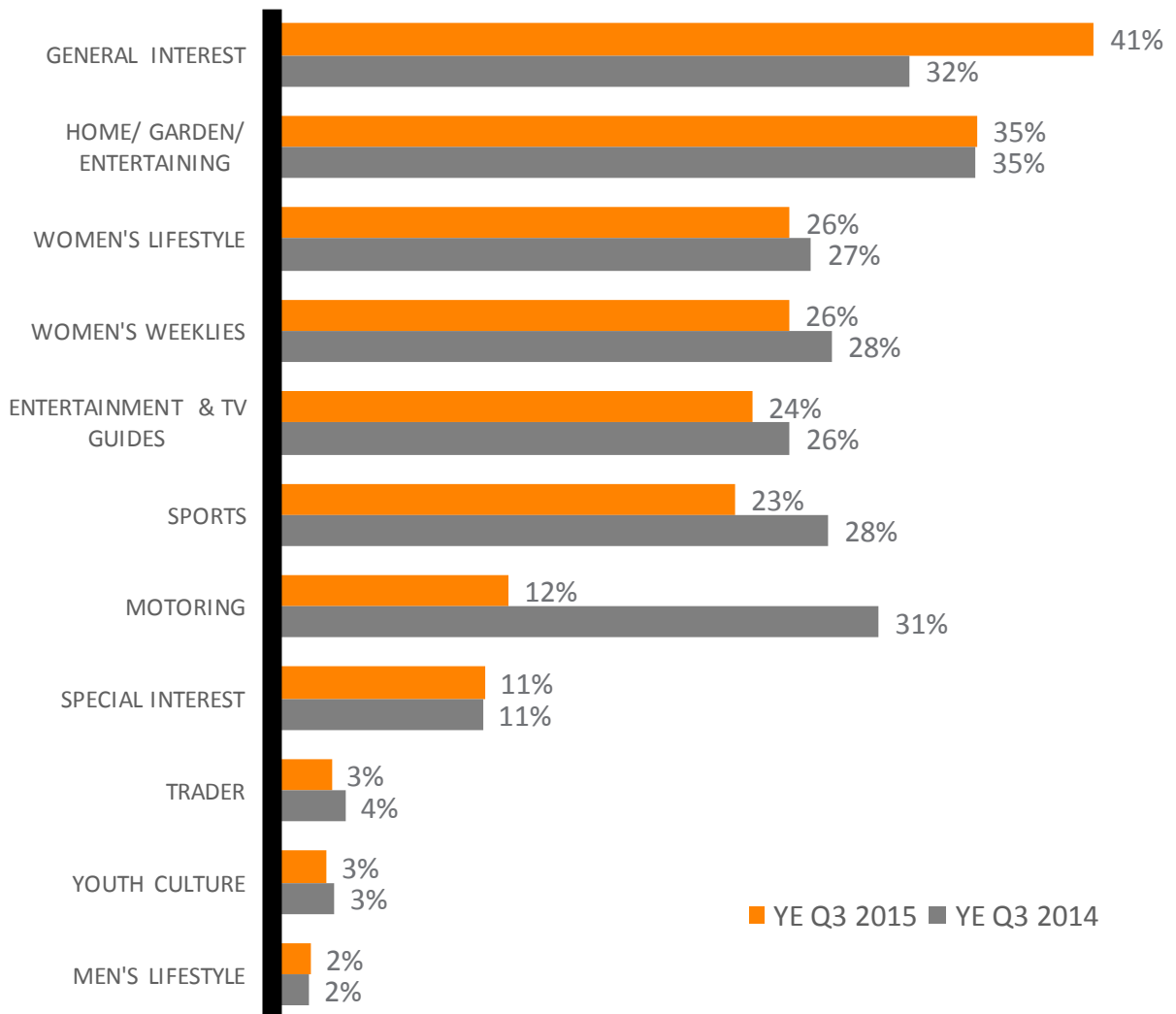
Source: Nielsen Consumer & Media Insights (Q4 2014 – Q3 2015)

Base: People 10+ (3,894,000)

MAGAZINE CATEGORIES

The General Interest category, in the top position, is the only category that has had growth year-on-year - this is due to the inclusion of AA Directions into the category which takes up 47% (previously, the magazine was measured under Motoring). The General Interest category would have been stable if AA Direction had not been included in the category.

Home/Garden/Entertaining, Special Interest and Men's Lifestyle maintained their readership while the remaining categories saw a decline*



Source: Nielsen Consumer & Media Insights (Q4 2014 – Q3 2015)

Base: People 10+ (3,894,000)

*Please refer to page 15 for changes to magazine categories



TOP 10 MAGAZINES THIS PERIOD

SIX TITLES IN THE TOP TEN MAGAZINES EXPERIENCED A DECLINE IN READERSHIP. SKYWATCH HAD THE LARGEST DECREASE YEAR-ON-YEAR. NZ HOUSE & GARDEN HAD THE HIGHEST PERCENTAGE INCREASE AT 4%.

RANK	TITLE	PEOPLE (000) YE Q3 14	REACH (%) YE Q3 14	PEOPLE (000) YE Q3 15	REACH (%) YE Q3 15	% CHANGE YEAR ON YEAR (YOY)
1	AA DIRECTIONS	738	19%	754	19%	2%
2	SKYWATCH	693	18%	646	17%	-7%
3	NZ WOMAN'S WEEKLY	665	17%	630	16%	-5%
4	WOMAN'S DAY	648	17%	629	16%	-3%
5	HUNTING & FISHING NZ	542	14%	553	14%	2%
6	AUSTRALIAN WOMEN'S WEEKLY	557	14%	534	14%	-4%
7	NZ HOUSE & GARDEN	494	13%	515	13%	4%
8	THE TV GUIDE	433	11%	413	11%	-5%
9	HEALTHY FOOD GUIDE	383	10%	396	10%	3%
10	CUISINE	356	9%	353	9%	-1%

Source: Nielsen Consumer & Media Insights (Q4 2014 – Q3 2015)

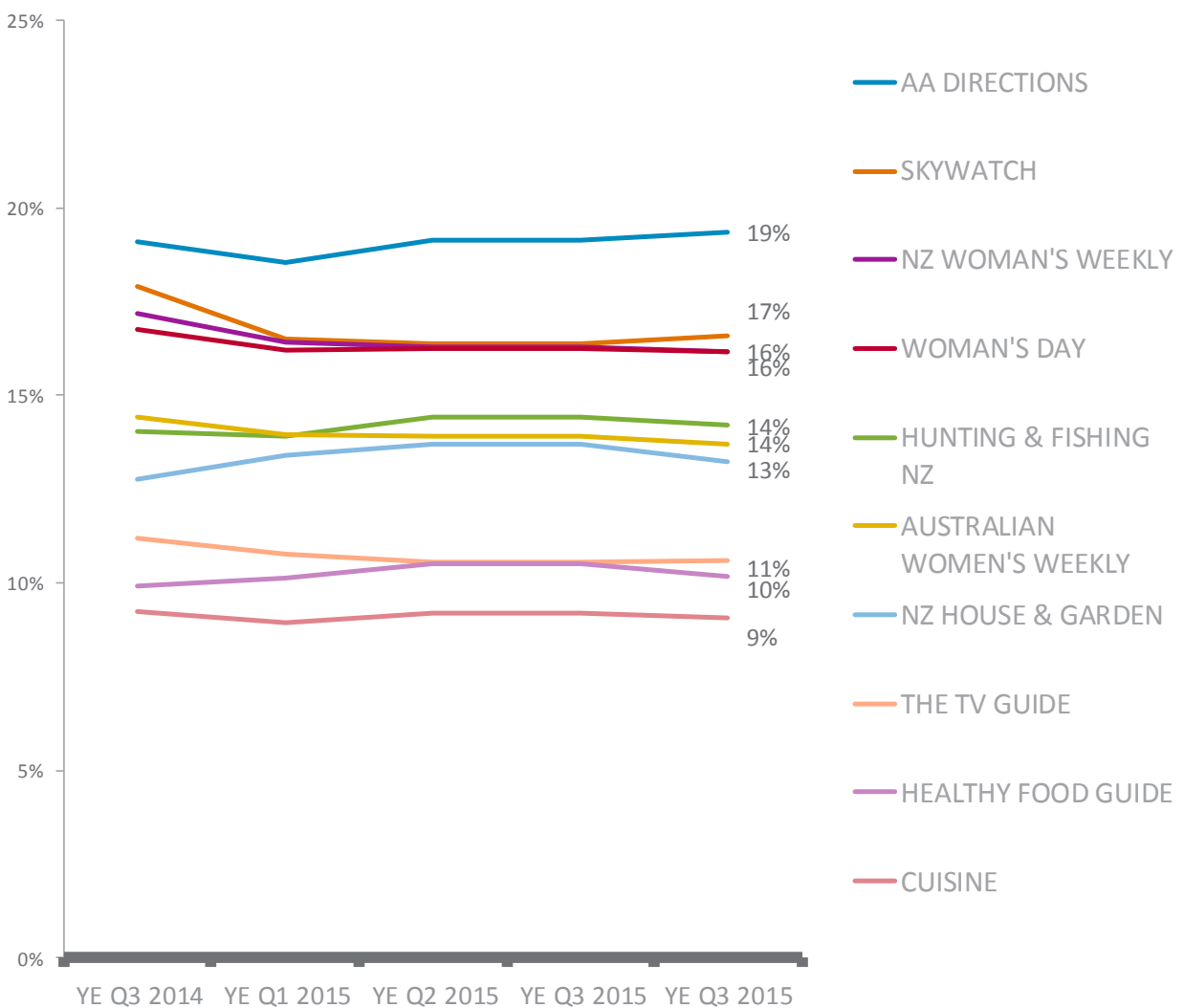
Base: People 10+ (3,894,000)



TOP 10 MAGAZINES

AA DIRECTIONS HAS SEEN THE GREATEST INCREASE SINCE THE LAST RELEASE

Trended Magazine Changes (last five releases)



YE Q3 2014 YE Q1 2015 YE Q2 2015 YE Q3 2015 YE Q3 2015

Source: Nielsen Consumer & Media Insights (Q4 2014 – Q3 2015)

Base: People 10+ (3,894,000)

KEY CONSUMER SEGMENTS



TITLES AGAINST KEY SEGMENTS (INDEX OVER 110 AND RANKED BY REACH)

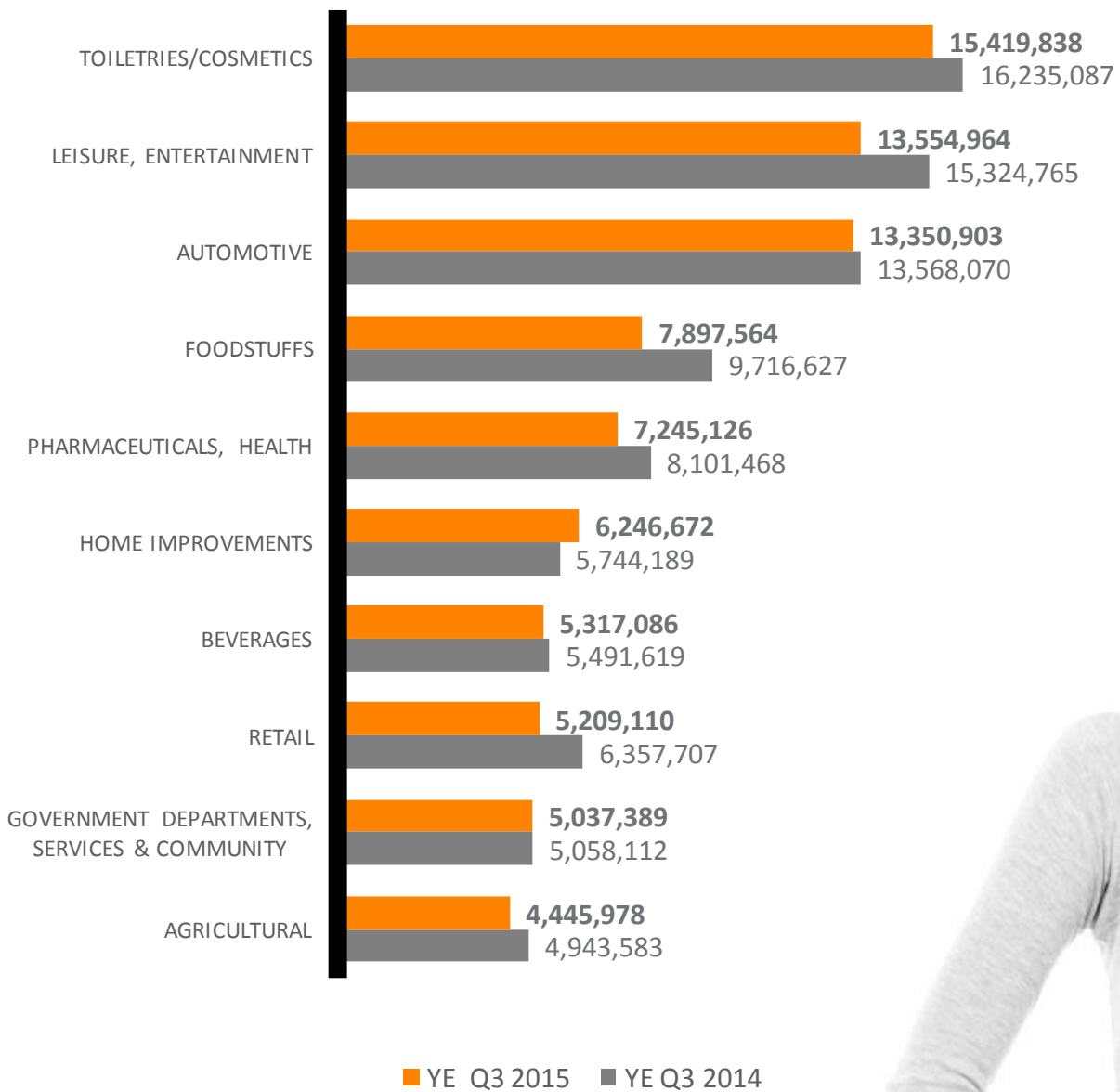
HOMEOWNERS 25-54			ALL PEOPLE 25-54		
22%	AA DIRECTIONS	113	15%	NZ HOUSE & GARDEN	112
19%	NZ HOUSE & GARDEN	143	12%	HEALTHY FOOD GUIDE	119
15%	KIAORA	177	11%	KIAORA	131
13%	CUISINE	148	11%	CUISINE	122
13%	HEALTHY FOOD GUIDE	128	9%	YOUR HOME AND GARDEN	121
MHHS WITH KIDS 0-14			25-54 SOCIO 1-3		
23%	WOMAN'S DAY	145	17%	NZ HOUSE & GARDEN	127
19%	NZ WOMAN'S WEEKLY	120	17%	KIAORA	194
18%	NZ HOUSE & GARDEN	139	14%	CUISINE	151
18%	AUSTRALIAN WOMEN'S WEEKLY	133	13%	HEALTHY FOOD GUIDE	128
17%	HEALTHY FOOD GUIDE	162	10%	YOUR HOME AND GARDEN	136
MALES 40-64			FEMALES 40-64		
24%	AA DIRECTIONS	125	28%	WOMAN'S DAY	176
21%	HUNTING & FISHING NZ	150	26%	NZ WOMAN'S WEEKLY	160
19%	SKYWATCH	117	25%	NZ HOUSE & GARDEN	190
14%	KIAORA	161	24%	AA DIRECTIONS	126
13%	NZ FISHING NEWS	200	24%	AUSTRALIAN WOMEN'S WEEKLY	174
MALES 18-39			FEMALES 18-39		
23%	HUNTING & FISHING NZ	159	23%	WOMAN'S DAY	140
16%	NZ PERFORMANCE CAR	270	19%	NZ WOMAN'S WEEKLY	120
12%	FISH AND GAME NZ	179	15%	AUSTRALIAN WOMEN'S WEEKLY	112
9%	NZ RUGBY WORLD	181	15%	NZ HOUSE & GARDEN	111
9%	NZ AUTOCAR	208	14%	HEALTHY FOOD GUIDE	141

Source: Nielsen Consumer & Media Insights (Q4 2014 – Q3 2015)

Base: People 10+ (3,894,000)

TOP 10 CATEGORIES IN MAGAZINES

Home Improvements is the only category within the top 10 to have increased spend, and this was by 9%. The FoodStuffs, Retail and Leisure & Entertainment categories all displayed decreases in spend of 19%, 18% and 12 % respectively.



TOP 5 CATEGORIES WITH INCREASED SPEND

1

INSURANCE



+\$ 661,266 (53%)

2

HOME IMPROVEMENTS



+\$ 502,483 (9%)

3

HOUSEHOLD ITEMS



+\$ 450,405 (58%)

4

INDUSTRIAL



+\$ 227,269 (6%)

5

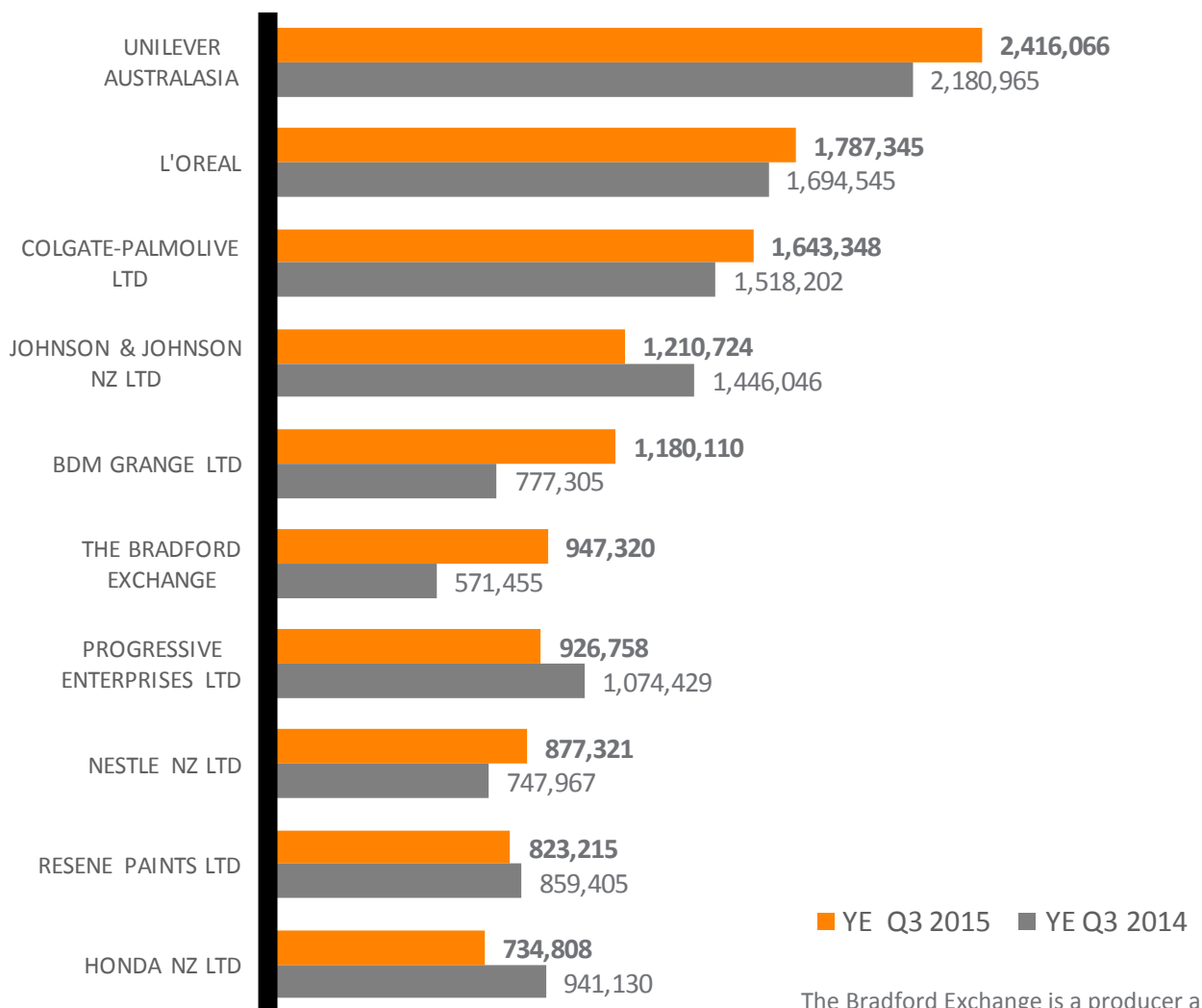
REAL ESTATE



+\$ 182,350 (13%)

TOP 10 ADVERTISERS IN MAGAZINES

Six of the top 10 advertisers have increased spend in 2015. The Bradford Exchange and BDM Grange LTD were the two advertisers who had the largest percentage growth in advertising spend with 66% and 52% respectively. Honda NZ Ltd decreased its spend by 22%.



The Bradford Exchange is a producer and marketer of collectible goods, jewellery, sports memorabilia and apparel

BDM is New Zealand's largest and fastest growing distributor of beauty and personal care products.

TOP 5 ADVERTISERS WITH INCREASED SPEND



- 1 BDM GRANGE LTD +\$402,805 (52%)
- 2 THE BRADFORD EXCHANGE +\$375,865 (66%)
- 3 RADIANT HEALTH LTD +\$343,340 (741%)
- 4 MICO NZ LTD +\$334,731 (6147%)
- 5 CIGNA INSURANCE COMPANY +\$319,705 (100%)

Mico NZ Ltd is a supplier of bathroom
and plumbing products



TOP 10

CATEGORIES IN SUPERMARKETS

	VALUE RANK	VALUE SALES	VALUE % Growth YA	UNIT SALES	UNIT % CHANGE YA
BEER	1	\$520,996,800	-0.0%	30,885,500	3.8%
CONFECTIONERY	2	\$487,125,700	5.3%	188,633,400	-1.9%
FRESH MILK AND CREAM	3	\$452,871,500	-0.7%	125,670,900	0.7%
BREAD	4	\$447,245,800	-5.5%	171,388,500	1.8%
WHITE WINE INCL CASKS	5	\$406,277,500	-2.5%	34,999,800	-2.4%
BISCUITS INCL RICE WAFER CAKES	6	\$392,983,300	4.3%	157,338,000	4.7%
TOBACCO	7	\$387,338,500	9.0%	19,819,100	-2.2%
CHEESE EXCLUDING CULTURED	8	\$371,959,200	1.1%	64,637,200	5.9%
SNACKFOODS	9	\$357,865,500	5.3%	141,617,900	2.9%
PREPACKED SMALLGOODS	10	\$351,655,300	6.8%	59,168,600	6.4%
MAGAZINES	56	\$70,701,500	-4.1%	14,001,500	-6.1%

MAGAZINES ARE NOW RANKED IN 56TH BY DOLLAR AMOUNT OF SALES IN SUPERMARKETS (PREVIOUSLY FROM 50TH POSITION FOR MAT WEEK ENDING 5/10/14)

APPENDIX

Titles By Magazine Category

ENTERTAINMENT & TV GUIDES

SkyWatch

The TV Guide

GENERAL INTEREST MAGAZINES

AA Directions

Avenues

fishHead

KiaOra

Metro

North & South

NZ Geographic

NZ Listener

Reader's Digest

The Word for Today

Wild Tomato

Word For You Today

SPECIAL INTEREST

Bride & Groom

Little Treasures

Good

New Zealand Weddings

Parenting Magazine

OHbaby!

The Shed

HOME/GARDEN/ ENTERTAINING

Cuisine

Dish

Food

Habitat

Healthy Food Guide

HOME New Zealand

homestyle

Houses

NZ Lifestyle Block

NZ House & Garden

NZ Gardener

Recipes+

Simply You Living

Taste

Urbis

Kiwi Gardener

Your Home & Garden

MEN'S LIFESTYLE MAGAZINES

M2

MOTORING MAGAZINES

Deals On Wheels

NZ Autocar

Motorhomes, Caravans & Destinations

NZ Performance Car

NZ Trucking

SPORTS MAGAZINES

Boating NZ

Fish and Game NZ

NZ Fishing News

NZ Fishing World

Hunting & Fishing NZ

NZ Horse & Pony

NZ Rugby World

The Red Bulletin

WOMEN'S LIFESTYLE MAGAZINES

Australian Women's Weekly

CLEO

Cosmopolitan

Fashion Quarterly

MiNDFOOD

NZ Life & Leisure

NEXT

Simply You

Good Health Choices

WOMEN'S WEEKLIES

Lucky Break

NW

New Idea

NZ Woman's Weekly

That's Life

Woman's Day

YOUTH CULTURE MAGAZINES

Girlfriend

TRADER MAGAZINES

Farm Trader

Trade-A-Boat

MAGAZINE CATEGORIES



CHANGES FROM YE Q3 2014

AA DIRECTIONS IS NOW **MEASURED** IN THE GENERAL INTEREST (PREVIOUSLY FROM MOTORING)

FAMILY CARE IS **NO LONGER MEASURED** UNDER SPECIAL INTEREST

THE SHED IS THE **NEW TITLE** ADDED UNDER SPECIAL INTEREST

WEEKEND GARDENER IN THE HOME/GARDEN/ ENTERTAINING CATEGORY HAS BEEN **RENAMED** KIWI GARDENER

NZ CLASSIC CAR, MOTORCYCLE TRADER AND **NZV8** ARE **NO LONGER MEASURED** UNDER MOTORING

SKY SPORT THE MAGAZINE IS **NO LONGER MEASURED** UNDER SPORTS

SURVEY DETAILS

SOURCE DATA

Nielsen Consumer and Media Insights **October 2014 – September 2015**

SURVEY AREA

This survey covers the whole of New Zealand including rural areas.

SURVEY DATES

The fieldwork for this survey covers the period from **October 2014 – September 2015**. The number of interviews was approximately the same in each quarter of fieldwork.

SURVEY POPULATION

This covers the population of New Zealand aged 10 years and over. The Nielsen Consumer and Media Insights Survey is using updated population estimates from Statistics New Zealand. This update means that the population used in this latest report is **3,894,000**

SAMPLE SIZE

The results presented in this report are based upon information collected from personally conducted interviews with a representative sample of **12,000** people aged ten years and over located throughout the whole of New Zealand.

When interpreting these results it is very important that the sample size is taken into consideration.



ABOUT NIELSEN

Nielsen N.V. (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers Watch and Buy. Nielsen's Watch segment provides media and advertising clients with Total Audience measurement services across all devices where content — video, audio and text — is consumed. The Buy segment offers consumer packaged goods manufacturers and retailers the industry's only global view of retail performance measurement. By integrating information from its Watch and Buy segments and other data sources, Nielsen provides its clients with both world-class measurement as well as analytics that help improve performance. Nielsen, an S&P 500 company, has operations in over 100 countries that cover more than 90 percent of the world's population.

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