

Newspapers

The majority of the daily newspapers have, once again, decreased in circulation. Where *The Express* was the only daily newspaper to show an increase in January-June '07, it is currently showing a decrease of 10%. *The Sunday Express* is also showing the most dramatic drop in circulation within the national Sunday papers with a decrease of 14%.

The Financial Times has increased its readership by 14.6% in the past year while *The Independent on Sunday* has suffered the biggest decrease of 9.8% year on year.

Circulation:

	Jun 07-Dec 07	Yron Yr % +/-
National Daily		
Daily Telegraph	873,523	-1.6
Financial Times	454,937	+6.5
Guardian	358,142	+0.6
Independent	246,584	+2.8
Times	622,186	-2.6
Daily Mail	2,310,806	-1.2
The Express	744,539	-10.0

Source: ABC

National Sunday

Observer	461,739	+4.3
Sunday Telegraph	625,549	-2.5
Sunday Times	1,148,329	-3.5
Independent on Sunday	221,698	+4.7
Mail on Sunday	2,209,642	-4.2
Sunday Express	677,480	-14.0

Source: ABC

Readership: (all adults; 000's)

	Jun 07-Dec 07	Yron Yr % +/-
National Daily		
Daily Telegraph	2,107	+3.1
Financial Times*	447	+14.6
Guardian	1,114	-1.2
Independent	699	-1.7
Times	1,627	-4.6
Daily Mail	5,408	+7.1
The Express	1,648	-3.6

Source: NRS *It is only available as full year data.

National Sunday

Observer	1,294	-4.4
Sunday Telegraph	1,769	-1.9
Sunday Times	3,052	-9.8
Independent on Sunday	761	-4.2
Mail on Sunday	5,996	+7.9
Sunday Express	1,810	-6.5

Source: NRS

Quality Colour Supplements

Sunday Times Magazine	2,554	-12.3
Telegraph Magazine	2,033	+2.6
Times Magazine	1,430	-15.7
You Magazine (Mail on Sunday)	4,830	+6.9
Sunday Telegraph Stella Magazine	1,158	+7.8
Sunday Express Magazine	1,502	-1.7
Daily Mail Weekend Magazine	5,738	+5.1

Source: NRS

Other Media

Television Forecasts for UK television ad spend in 2008 have been downgraded following a disappointing first quarter and continued global economic uncertainty. Forecasts have gone down to as low as zero from 2.2% growth predicted just late last year. However, organisations like the Advertising Association are still predicting marginal growth of around 0.8%. Ad spend remained sluggish over the traditionally lucrative Easter period. The economic climate's knock-on effect on property and financial advertising and the failure of any British nations to qualify for football's 2008 European Championships will continue to dent ad revenues in the coming months.

Outdoor JCDcaux has signed up for several major advertisers to launch its PrimeTime network of 20 digital roadside screens across London. They include Toyota, Lucozade, Ford, Yell.com and the BBC. The new format is being billed as a real alternative to print in London and aims to attract new outdoor advertisers. The network is anticipated to deliver to 4.8 million Londoners across a 2 week period. The screens are 6x3 metres and offer a high definition display using LED technology. JCDcaux's MD has likened a 2 week campaign on the new network as being equivalent to 16 days' circulation in the *Evening Standard*.

Online Despite the gloomy outlook for television revenues, the total UK ad spend across all mediums is likely to be held up to somewhere between 3.5 and 5.5% growth in 2008 by the predicted increase in internet ad spend. Online ad spend is likely to reach £3.4 billion in 2008 from £2.6 billion in 2007. This is a predicted rise of 30% year on year. It is also predicted that search advertising will account for 60% of overall online ad spend by the year 2012.

Radio The latest figures from Nielsen Media Research reveal that the motoring sector remains the biggest spender on commercial radio. The sector accounted for 13.5% (or £79.9 million) of all ad spend in the 12 month period up to the end of February 2008. This is up 2% year on year in the same period. The second biggest spender was government institutions who spent £79.8 million in the same period. After this sector came entertainment and media advertisers at £75.8 million. Among all the categories, cosmetics and toiletries brands posted the highest jump from an ad spend of £8.8 million a year before to a current spend of £13.2 million.

Magazines

Condé Nast The Condé Nast titles are showing steady increases across the board. After the noticeable decrease in circulation from January-June '07 of *Glamour*, recent figures tell us of an improvement of 1%. *Interiors* has had the best 6 months with an increase of 2.1%.

The most dramatic increase in readership within the Condé Nast titles is that of *GQ* magazine. The current figures released show that their readership has inflated by 7.8%.

National Magazines National Magazine titles are, once again, showing steady increases in circulation. The most noticeable is that of *Esquire* with a rise of 11.7%. All titles in the National Magazine Company stable show a significant increase in their readership, but none more so than *Esquire* with a leap of 22.7%.

IPC IPC titles have continued to show steady growth in their circulation figures with the exception of *Marie Claire*, which revealed a slight decrease of 0.8%. The readership figures of *Marie Claire* reveal a different side of things by showing an increase of 4.2%.

Others After *OK's* circulation dropped by 10.7% in January-June '07, they have made a huge comeback by increasing their circulation by 22.7% year on year. *Hello* magazine is showing the biggest decrease of 3.4%. Other titles have been up and down with the readership. *OK* magazine has increased theirs by 6.1% and *Country Life* has had the biggest drop of 16.2%.

Circulation: Monthly Magazines (UK & overseas)

Condé Nast	Jun 07-Dec 07	Yr on Yr % +/-
House & Garden	143,089	+0.9
Tatler	90,590	+0.5
Vogue	220,084	+1.0
Interiors	67,021	+2.1
GQ	129,520	+1.3
Vanity Fair	99,402	+1.2
Glamour	550,066	+1.0
Traveller	85,106	+0.1

National Magazine Company

Country Living	195,159	+1.5
Bazaar	109,033	+3.0
Esquire	59,800	+11.7
Good Housekeeping	464,276	+6.6
Cosmopolitan	460,276	+2.1

IPC

Homes & Gardens	140,185	+0.8
Country Homes & Interiors	86,603	+5.2
Marie Claire	330,182	-0.8
InStyle	179,558	+0.5

Others

Country Life (weekly) *	40,408	n/a
Hello (weekly)	405,615	-3.4
OK (weekly)	683,451	+22.7
Elle	203,435	+0.1
Red	224,208	-0.4

* Jan-Dec 07 figures

Source: ABC

Readership: Monthly Magazines (Women; 000's)

Condé Nast	Jun 07-Dec 07	Yr on Yr % +/-
House & Garden	537	+1.3
Tatler **	159	+2.5
Vogue	1,067	+4.9
Interiors **	104	n/a
GQ *	523	+7.8
Vanity Fair **	196	+2.6
Glamour	1,208	+1.6

National Magazine Company

Country Living	546	-3.4
Bazaar	183	+7.1
Esquire **/*	162	+22.7
Good Housekeeping	1,343	+4.9
Cosmopolitan	1,102	-6.5

IPC

Homes & Gardens	592	-2.5
Country Homes & Interiors	205	+0.5
Marie Claire	1,149	+4.2
InStyle **	271	-10.3

Others

Country Life (weekly) **	113	-16.2
Hello (weekly)	1,900	-3.1
OK (weekly)	2,536	+6.1
Elle	837	+1.0
Red	596	-2.6

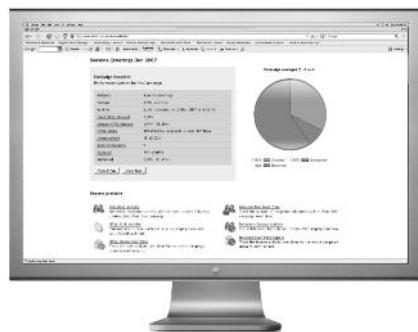
* Readership of all men 000's

** Jan'07-Dec'07 figures Source: NRS

E-newsletters

Our E-News programme will give you complete control over the sending of your e-newsletters. We will set up as many different templates as you require and, when you are ready to send an e-newsletter, all you have to do is upload the copy and images, select your mailing list and click send. Our system allows you to view screenshots of how the e-mail will look in all major e-mail clients and pass them through a spam testing feature. You will also receive detailed reporting on your campaign, including how many recipients opened the e-mail, clicked a link, unsubscribed, forwarded your e-mail to a friend and many more measures to allow you to gauge the effectiveness of your campaign. For further information please contact Sophie Bradbury on 020 7838 5003 or email sophie@strattons.com

Below is an example of our e-newsletter reporting.



US Magazines

	Circulation Autumn '07 000's	% change +/- vs. Autumn '06	Total Readership Autumn '07 000's
Hearst			
Esquire	721	+1.8	3,233
Harpers Bazaar	722	+3.7	3,035
Marie Claire	971	+3.1	3,506
Good Housekeeping	4,734	+2.8	25,592
Cosmopolitan	2,916	+8.7	17,912
Town & Country	462	-1.9	4,244
House Beautiful	873	-2.1	6,514

Source: MRI

Condé Nast

Architectural Digest	813	+1.7	4,588
Bon Appetit	1,367	+3.0	6,081
Condé Nast Traveler	783	+1.2	3,119
GQ	932	+9.1	5,851
Gourmet	969	-2.0	5,423
House & Garden	976	+5.7	14,384
Vanity Fair	1,154	-4.5	6,360
Vogue	1,302	+0.1	10,543

Source: MRI

	Circulation Spring '07 000's	% change +/- vs. Spring '06	Total Readership Spring '07 000's
Others			
Elle	1,073	-0.5	4,537
Food & Wine	932	+1.9	6,682
Forbes	926	-0.1	4,634
New Yorker	1,070	+1.7	3,590
Time	3,400	-15.6	20,909
Travel & Leisure	969	+1.1	4,730

Source: MRI