



Insights from the CTC Boxscore/CTC Cognos System

2016 CTC Boxscore

2016 Rank	2015 Rank	Title Name (Blue denotes CTC clients as of 2016) (Italicized titles may not be final due to frequency and timing)	Current Freq	Category	2016 Issue Count	2015 Issue Count	2016 Unit Sale	2015 Unit Sale	2016 \$ Sale	2015 \$ Sale
1	1	People	WK	Celebrity	52	53	2,888,949	3,350,891	\$18,754,531.51	\$20,455,602.09
2	2	Woman's World	WK	Women's Lifestyle	52	52	4,315,981	4,756,425	\$10,470,759.49	\$11,014,856.25
3	4	Hello!	WK	Celebrity	37	37	1,465,518	1,606,250	\$8,809,560.82	\$9,621,437.50
4	3	In Touch Weekly	WK	Celebrity	52	52	2,407,387	2,968,648	\$8,805,816.13	\$10,360,581.52
5	7	Star	WK	Tabloid	52	52	1,147,873	1,280,030	\$7,125,227.27	\$7,486,482.20
6	6	National Enquirer	WK	Tabloid	52	52	1,172,307	1,388,400	\$7,022,118.93	\$8,117,151.00
7	5	US Weekly	WK	Celebrity	52	52	1,089,731	1,431,292	\$6,527,488.69	\$8,573,439.08
8	8	Life & Style	WK	Celebrity	52	52	1,269,073	1,800,568	\$5,245,482.27	\$6,497,452.32
9	9	Globe	WK	Celebrity	52	52	739,966	797,911	\$4,432,396.34	\$4,666,785.39
10	11	First For Women	MO	Women's Lifestyle	17	18	1,112,337	1,269,209	\$3,325,887.63	\$3,794,934.91
11	12	In Style	MO	Fashion/Beauty	12	12	436,339	479,612	\$3,262,144.61	\$3,549,067.88
12	15	House & Home	MO	Home Decor	12	12	498,832	500,336	\$3,234,198.50	\$3,083,684.65
13	13	Hello! SIP	MO	Celebrity	8	8	462,640	492,215	\$3,233,853.60	\$3,440,582.85
14	10	Cosmopolitan	MO	Fashion/Beauty	12	12	584,717	839,092	\$3,025,766.83	\$4,349,665.08
15	17	OK! Weekly	WK	Celebrity	52	52	478,341	467,882	\$2,968,247.59	\$2,740,959.18

To view the 2016 CTC Boxscore, visit www.ctcmagazines.com/boxscore

Canadian vs. Non-Canadian Sales



- Of the English language magazines sold through mass-market wholesalers, 83% are Non-Canadian and 17% are Canadian published.
- Canadian magazine market share has been increasing. As an example, Canadian published magazines represented 13% of total mass market sales in 2009. Prior to the year 2000, this number was less than 10%.

Canadian Newsstand Sales Outperform the USA Based on Population Ratios



- With 36.4 million people, Canada is 10% of the North American population.
- However, Canada represents almost 13% of the total newsstand sales of English language magazines sold through mass market wholesalers.
- What makes this more impressive are the following facts...

Canadian Newsstand Sales Outperform the USA Based on Population Ratios



- French is the mother tongue of 22.3% of the Canadian population or about **7 million** Canadians. The majority of the French language population live in the province of Quebec. Of this number, 4.5 million only speak French, and as such are not consumers of English language magazines.
- Consumers of newsstand magazines in Canada typically pay significantly higher taxes on their newsstand purchases. This ranges from a low of 5% in Alberta to a high of 15% in the Maritime provinces. The average is likely in the 13% range. Contrast this to USA state taxes ranging from 0% to 7.5%.
- Canadians pay more for their magazines. In 2016 the average retail price in the USA was \$5.50 and in Canada it was \$6.50 (\$6.26 in 2015).

Canadian Newsstand Sales Outperform the USA Based on Population Ratios




- The French language magazine publishing industry is a huge one in Canada.
- If we were able to include the French language sales data in the CTC Boxscore, Canada's market share of total magazines sold in North America would be even higher than the almost 13% we see from English language magazine sales.
- The impact of the French language titles in North America would be offset somewhat by sales of Spanish language magazines sold in the USA through non-traditional magazine distributors.
- While CTC would like to include Canada's French language magazine sales data in the boxscore, these Publishers do not share their sales data with us.

How Many Titles Are Up?



- In 2016 there were 1,986 English language magazines distributed through mass market wholesalers. Of this number, 1,812 were also distributed in 2015.
- The number of magazines distributed to Canadian retailers is greater than those noted above. However, as mentioned we do not have the data for either domestic French titles or imported magazines not distributed through the wholesaler network.
- Of these 1,812 magazines that were distributed in both 2016 and 2015, how many do you think experienced an increase in total annual retail dollar sales?

How Many Titles Are Up?

613! 

(or 31% of all titles)

Top 10 In Total Dollar Sales Increases

- These 10 regular frequency titles (weekly, monthly, bi-monthly) were the top performers in 2016 based on total retail dollar sale increases. To qualify, the number of issues in 2016 must be similar to the number of releases in 2015.
- A good portion of the titles that are showing increased volume in 2016 versus 2015 were producers of SIP's who've increased their number of issues in 2016.



Top 10 In Total Dollar Sales Increases

2016 Rank	2015 Rank	Title	Freq	2016 vs 2015
15	17	OK! Weekly	WK	+ \$ 227,288
41	67	Cook's Illustrated - SIP 02745	MO	+ \$ 171,899
12	15	House & Home	MO	+ \$ 150,513
99	177	Victoria Bliss	BM	+ \$ 150,446
114	195	The Atlantic Monthly	MO	+ \$ 132,590
20	24	Vanity Fair	MO	+ \$ 132,580
31	34	Men's Health	MO	+ \$ 112,516
48	69	Archie Double Digest	MO	+ \$ 98,238
24	27	The Economist	WK	+ \$ 90,614
16	18	Closer	WK	+ \$ 73,966

Market Share By Frequency

Frequency	# of Titles	2016 \$ Sale	2015 \$ Sale	2016 MS \$ %	2015 MS \$ %
Monthlies	603	\$ 101,213,660	\$ 115,288,018	34.2%	36.3%
Weeklies	35	\$ 90,385,028	\$ 100,232,901	30.5%	31.5%
Bi-Monthlies	481	\$ 33,610,733	\$ 37,118,067	11.4%	11.7%
Quarterlies	305	\$ 23,431,733	\$ 23,547,268	7.9%	7.4%
Semi-Annuals	246	\$ 20,026,219	\$ 18,907,567	6.8%	5.9%
Annuals	270	\$ 19,054,868	\$ 14,264,130	6.4%	4.5%
Bi-Weeklies	46	\$ 8,274,876	\$ 8,662,691	2.8%	2.7%
Totals	1986	\$ 295,997,119	\$ 318,020,642	100.0%	100.0%



Top Selling Categories

Rank	Category	2016 \$ Sale	2016 Units	2016 Avg. RP	2016 MS \$ Sale %	Rank	Category	2015 \$ Sale	2015 Units	2015 Avg. RP	2015 MS \$ Sale %
1	Celebrity	\$ 67,069,151	11,602,072	\$ 5.78	22.6%	1	Celebrity	\$ 75,975,796	13,945,333	\$ 5.45	23.4%
2	Women's Lifestyle	\$ 25,346,227	7,611,341	\$ 3.33	8.6%	2	Women's Lifestyle	\$ 28,122,991	8,740,310	\$ 3.22	8.7%
3	Food/Recipes	\$ 17,812,770	1,917,595	\$ 9.29	6.0%	3	Food/Recipes	\$ 18,911,895	2,121,929	\$ 8.91	5.8%
4	Home Decor	\$ 16,488,939	2,113,478	\$ 7.80	5.6%	4	Tabloid	\$ 17,249,360	2,978,316	\$ 5.79	5.3%
5	Tabloid	\$ 15,855,977	2,607,293	\$ 6.08	5.4%	5	Home Decor	\$ 17,218,950	2,259,475	\$ 7.62	5.3%
6	Crosswords/Puzzle	\$ 15,254,538	2,728,847	\$ 5.59	5.1%	6	Crosswords/Puzzle	\$ 15,276,690	2,900,121	\$ 5.27	4.7%
7	Fashion/Beauty	\$ 11,704,420	1,835,716	\$ 6.38	4.0%	7	Fashion/Beauty	\$ 14,420,782	2,353,373	\$ 6.13	4.4%
8	Current Affairs	\$ 9,079,593	1,044,912	\$ 8.69	3.1%	8	Science/Nature	\$ 9,076,164	1,033,099	\$ 8.79	2.8%
9	General Interest	\$ 8,431,763	827,469	\$ 10.19	2.8%	9	Automotive	\$ 8,534,631	1,208,730	\$ 7.06	2.6%
10	Science/Nature	\$ 8,186,730	877,254	\$ 9.33	2.8%	10	Current Affairs	\$ 8,238,181	1,008,556	\$ 8.17	2.5%



Categories Up

- Of the 71 categories in 2016, 11 of them have increased their dollar sales.

Rank	Category	2016 Issue Count	2015 Issue Count	2016 Unit Sale	2015 Unit Sale	2016 \$ Sale	2015 \$ Sale	2016 Avg. Cover Price	2016 vs 2015 \$	2016 vs 2015 %
29	Colouring Books Total	69	8	179,148	74,566	\$1,729,466.28	\$711,777.34	\$9.65	+ \$1,017,688.94	+ 143.0%
8	Current Affairs Total	350	341	1,044,661	1,008,381	\$9,074,664.58	\$8,235,888.05	\$8.69	+ \$838,776.53	+ 10.2%
9	General Interest Total	283	293	826,457	834,816	\$8,416,693.91	\$8,032,634.73	\$10.18	+ \$384,059.18	+ 4.8%
34	Hobby/Collectibles Total	336	303	152,401	121,731	\$1,439,582.36	\$1,082,587.52	\$9.45	+ \$356,994.84	+ 33.0%
13	Health/Wellness Total	228	219	1,040,910	1,097,139	\$7,052,766.24	\$6,819,334.39	\$6.78	+ \$233,431.85	+ 3.4%
17	Comics Total	175	167	703,307	797,341	\$4,949,955.66	\$4,753,737.00	\$7.04	+ \$196,218.66	+ 4.1%
39	History Total	129	122	102,818	92,236	\$1,007,378.14	\$856,061.63	\$9.80	+ \$151,316.51	+ 17.7%
48	Baseball Total	20	20	61,335	50,059	\$616,061.70	\$477,829.85	\$10.04	+ \$138,231.85	+ 28.9%
61	Basketball Total	17	17	27,339	23,940	\$255,141.61	\$178,149.03	\$9.33	+ \$76,992.58	+ 43.2%
46	Football Total	31	25	67,697	60,490	\$647,472.43	\$572,640.23	\$9.56	+ \$74,832.20	+ 13.1%
11	Entertainment Total	430	457	1,283,946	1,335,248	\$7,804,288.14	\$7,742,528.02	\$6.08	+ \$61,760.12	+ 0.8%

Mainline Sales More Resilient Than Check Out

	2016 Unit Sale	2015 Unit Sale	2016 \$ Sale	2015 \$ Sale	2016 vs 2015 Units %	2016 vs 2015 \$ %	2016 \$ % MS	2015 \$ % MS
Mainline	10,347,135	10,946,320	\$ 77,172,979	\$ 78,164,536	-5.5%	-1.3%	26.1%	24.6%
Checkout	35,933,235	41,541,689	\$ 218,824,140	\$ 239,856,106	-13.5%	-8.8%	73.9%	75.4%
Total	46,280,370	52,488,009	\$ 295,997,119	\$ 318,020,642	-11.8%	-6.9%	100.0%	100.0%

- If we factored in a lot of the imported titles that are not distributed via mass market wholesalers, it would drive the mainline market share even higher.

Top Selling Retailers in Canada

- The top selling location in Canada (comprised of multiple retail outlets) is the Toronto Airport which sells almost \$4 million in magazines annually.
- As was the case in 2015, the top selling single retail store is a book store in Toronto. (Total Retail \$546,113 in 2016)
- There are always some surprising statistics as to where the best selling locations are in Canada.

Top Selling Retailers in Canada

- Examples...
 - The top selling Mass Merchandiser is located in Kingston, Ontario (\$402,020)
 - The top selling Newsstand is located in Ottawa, Ontario (\$346,850)
 - The top selling Supermarket is located in White Rock, BC (\$175,943)
 - The top selling Drug store is located in Vancouver, BC (\$171,065)
 - The top selling Convenience store is located in Montreal, Quebec (\$74,516)



Average Sales by Class of Trade

2015 COT	# of Stores (All)	Top Selling Store	Ave. \$ Sales per Store
Terminals	113	N/A	\$ 166,258
Bookstore	264	\$ 770,460	\$ 110,327
Mass Merch	718	\$ 194,939	\$ 100,942
Supermarket	2,711	\$ 355,706	\$ 37,681
Drugstore	2,667	\$ 194,966	\$ 26,108
Newsstand	908	\$ 194,806	\$ 19,509
Convenience	5,148	\$ 189,483	\$ 6,291

Class of Trade Report

Class of Trade	2016 \$ Sale	2015 \$ Sale	2016 vs 2015 \$ %	2016 MS Sale %	2015 MS Sale %
Super Market	\$89,630,922.86	\$97,388,444.76	-8.0%	30.1%	30.0%
Mass Merchandiser	\$66,929,074.86	\$70,632,790.30	-5.2%	22.5%	21.8%
Drug	\$66,628,152.16	\$67,956,738.48	-2.0%	22.4%	21.0%
Convenience	\$21,071,504.08	\$28,409,557.78	-25.8%	7.1%	8.8%
BookStore	\$18,466,059.75	\$20,444,941.11	-9.7%	6.2%	6.3%
Terminal	\$15,334,101.91	\$16,777,369.73	-8.6%	5.1%	5.2%
Newsstand	\$14,692,323.02	\$17,040,920.90	-13.8%	4.9%	5.3%
Other	\$5,098,154.22	\$5,609,203.65	-9.1%	1.7%	1.7%



Thank You!