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THE MAGAZINE MARKET IN POLAND

The aim of the article is the economic analysis of the magazine market in Poland. According to the theory of the organization of publishing industry (industrial organization, industrial economics) which is accepted in market research there is a correlation of the market size and structure with its development potential and effectiveness of its existing companies. The article contains the quantitative description of the market and presents the character of the changes that take place on it. The qualitative evaluation of the magazine market in Poland is presented in the degree of its concentration and the profitability of the selected publishing companies.

Despite the insufficiency of the data on its size and structure, the author tries to show the direction of the market development in terms of its quantity and quality. She presents the changes in the number of titles and the circulation of journals, the decrease in their periodicity, the degree of the market concentration and its advertising potential.

The magazine market is a separate segment of the press market[1]. In economic analysis, the market segment is described as the relevant market, i.e. the market for products which, because of their destination, price and properties, are considered

[1] The appropriateness of the division of the media market into specific sectors (press, radio, television) was recognized by the European Commission in the decisions issued in IV/M.1401 (1.02.1999, Recoletos/Uniseda) and IV/M665 (29.11.1995 Havas/Groupe de la Cite). The European Commission, in accordance with the UNESCO classification of 1964, divides the press market into local or national daily newspapers and magazines. The division of press production into newspapers and magazines is also sanctioned in Poland by the Press Law of January 26, 1984.

by the purchasers as similar (substitutable)[2]. In the times of media convergence, however, the boundaries of the particular media markets get blurred. The difficulty in accurate determining the size and structure of the magazines market is also caused by the lack of the basic data on the number of the titles functioning on the market[3], their global circulation[4], the number of publishers[5], or advertising potential[6]. The qualitative market analysis of magazines encounters barriers in the form of "business secret" of the publishers who do not reveal their sales revenue and thus their market position[7]. There are no clearly defined theme categories of journals, and therefore there is no possibility of the segmentation of the magazine market recipients. It is difficult to judge on the popularity of the particular titles among readers, because in 2014 the Press Distribution Control Association monitored the circulation and distribution of only 354 press titles (namely about 5% of the ones published on the market)[8], and the Polish Research on Readership covered only 180 press titles. In total, about 40 million zlotys per year[9] is spent on research into the range and reception of all the media in Poland, along with expensive telemetric research, radio listening or Internet use. Various companies, which present incompatible, incomplete, late and only approximate data deal with this research.

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[2] See. Art. 4 point 9 of the Act on Competition and Consumer Protection, "Dziennik Ustaw" (Journal of Laws) 2007.

[3] The National Library maintains the register of the titles based on the record regulation of the Act on Compulsory Library Copies (Law of 7 November 1996 on compulsory library copies, Journal of Laws 1996, No. 152, item 722), but acknowledges that not all publishers fulfill the statutory obligation to submit mandatory copies to selected libraries.

[4] In 2014, the National Library abandoned the publication of the data on journal circulation, explaining that magazine publishers did not provide information about its number of publishers, or advertising potential. See. *Press Release in numbers 2014*. Warsaw 2016, http://www.bn.org [accessed October 2016].

[5] In Poland there is no central register of publishers of newspapers and periodicals. The National Library establishes a list of publishers based on report regulation of the Act on mandatory library copies.

[6] The advertising expenses in magazines are only known approximately. Kantar Media collects data on advertising revenue of the particular media by making from life a list of all advertising broadcasts in a given medium and evaluating them according to the official price list (so-called gross expenses). This does not, however, reflect actual expenditures on advertising. Real revenue depends on the publisher discount policy and thus they may be several times lower (so-called net expenses).

[7] Complete transparent data on this subject is given only by Agora S.A. Another publisher present on the Polish stock exchange – PMPG Polskie Media S.A. (Publisher of the weekly magazines: "Wprost", "Tygodnik do Rzeczy" and "Historia do Rzeczy" was frequently punished by the KNF for improperly performing the duty of informing on their financial situation.

[8] The number of press titles monitored by ZKDP has been steadily decreasing since 2008 and in October 2016 it amounted only to 321. Cf. ZKDP, *Controlled Titles – Changes*, https://www.zkdp.pl/index.php?option=com_content&view=article&id=25&Itemid=18&lang=pl [accessed 20.11.2016].

[9] It is less than 0.5 percent of all the advertising expenditures in Poland and a small part of the funds targeted at the market or public opinion research, on which 577 million zlotys is spent. See. M. Lemańska, *Branża reklamowa niezadowolona z badań mediowych*, "Rzeczpospolita", 7.09.2016.

The number of the titles and the global magazine circulation

The magazine market is the largest segment of the press production – in terms of the number of the titles and the global circulation. The share of magazines in the total number of press titles published in Poland amounted to 99.3% in 2014 (Table 1). There were 6751 journals[10] in the National Library's registers then, although press distributors had about 4,000 titles in their offer. This means that a large proportion of the titles are distributed outside the sales network and is not market-based.

Since 1990 the number of periodicals has raised more than twice, increasing by about one thousand in every five years successively. Since 2013, however, a decrease in the number of magazine titles has been observed. In just two year time the segment lost over 1,000 titles.

Table 1. The number of the newspapers and magazines published in Poland between 1990 and 2014 and their periodicity

Year	1990		2000		2010		2012		2013		2014	
	Number	Share in %	Number	Share in %	Number	Share in %	Number	Share in %	Number	Share in %	Number	Share in %
In total	3180	100	5534	100	7827	100	7827	100	7405	100	6796	100
Newspapers	83	2.6	55	1.0	45	0.6	45	0.6	44	0.6	45	0.7
Weekly	277	8.7	382	6.9	416	5.1	416	5.3	378	5.1	401	5.9
Biweekly	171	5.4	266	4.8	246	3.1	246	3.1	240	3.2	231	3.4
Monthly	652	20.5	1805	32.7	1890	25.4	1890	24.2	1837	24.8	1697	24.9
Bimonthly	189	5.9	433	7.8	808	10.7	808	10.3	791	10.7	634	9.3
Quarterly	468	14.7	1120	20.2	2142	24.7	2142	27.4	2116	28.6	1716	25.3
Less frequent	1340	42.2	1473	26.6	2280	30.4	2280	29.1	1729	23.3	2072	30.5

Source: *Press Release in numbers 2014*, http://www.bn.org [accessed 10.11.2016].

The number of the titles issued shows the versatility of the press market, but does not present its size. This can be estimated on the basis of the total volume of the titles issued[11]. The share of magazines in the global press circulation amounted to more than 60% in 2013, which means that their global output has almost doubled since 1990 (from less than 700 million copies to over 1260 million copies).

[10] National Library, *Publishing Movement in Numbers 2014*, Warsaw 2016, http://www.bn.org [accessed October 2016].

[11] Analysis based on global magazine circulation are over in 2013. See footnote 4.

Frequency of the edition (periodicity)

The increase in the number of titles is accompanied by the reduction in their periodicity. The share of newspapers, weeklies, biweeklies and monthlies in the total number of the titles has decreased since 1995, in which year it amounted to 50.6%, and then reached 35% in 2014[12].

Periodicals of this type – currently constituting one third of the journals published in Poland, account for 93% of the circulation. It also means that 2/3 of the titles published in Poland are the ones that appear rarely, are low-cost and targeted at a very narrow audience.

Media specialists notice that there is a relationship between the frequency of the magazine's appearance and its profile and the size of the audience (circulation)[13]. The increase in the number of titles and the decrease in their periodicity is the evidence of the progressive fragmentation (fragmentarisation) of the press market in Poland[14]. On the one hand, fragmentation contributes to pluralism of the communication system and results in progressive social prosperity[15]. On the other hand, the dismembering of the press offer (i.e. the appearance of a growing number of smaller titles with smaller influence reach on the market) has negative consequences, as it may contribute to lowering of the press offer quality[16].

There are various reasons why readers reduce the intensity of their contact with the title, for instance: the increase in the number of media channels (competition from other media, especially the electronic ones which causes a decline in the print readership), the increase of the economic and social costs of using an increased media offer; the weakness of press subscription, the secondarisation of reception and the decrease in concentration, as well as a change in the style of the press reading[17].

Following the changes in the readers' attitudes, the publishers decrease the number of editions of the edited titles. This allows them to rationalize the costs. Replacing a weekly with a biweekly or a biweekly with a monthly is usually connected

[12] National Library, *Press Release in numbers 2014*, http://www.bn.org [accessed 10.11.2016].

[13] T. Kowalski and B. Jung emphasize, for example, that higher frequency journals (from weekly to monthly) are characterized by more universal subject matter and thus higher expenditure and broader readership. Other magazines (bimonthly, quarterly, half-yearly) are usually more specialized and addressed to narrower readership groups. See. T. Kowalski, B. Jung, *Media na rynku. Wprowadzenie do ekonomiki mediów*, Warszawa 2006, p. 146.

[14] About the fragmentation in the media, which is manifested by the increasing number of media channels, decreasing number of recipients of a certain type of media and individual media channels, and the loss of old media coverage. J. Mikułowski Pomorski, *Fragmentaryzacja w mediach: proces i narzędzie*, "Global Media Journal – Polish Edition" 2006, No. 1.

[15] Cf. T. Kowalski, B. Jung, *Media na rynku*, p. 147.

[16] J. Żabiński, *Marketing na rynku prasowym*, Warsaw 2010, p. 51. The consequences of fragmentation of the media also include J. Mikułowski-Pomorski, *Fragmentaryzacja w mediach*.

[17] See. J. Mikułowski-Pomorski, *Czytelnik poszukuje partnera. Jak utrzymać wiernego czytelnika*, in: *Współczesny dziennikarz i nadawca*, ed. M. Gierula, Sosnowiec 2006, p. 7–20.

with an increase in its volume and the improvement in the editorial quality and content. Growing publishing costs can be balanced out with the increase in copy price without fear of a decrease in sales. By regularly buying a more expensive title with lesser periodicity, the reader pays less than if he regularly bought a cheaper one with higher periodicity. The publisher may also expect fewer returns because the product is of better quality and it stays longer on sale. The greater volume also makes it possible to allocate more space for advertisements.

Magazine publishers and degree of the market concentration

In Poland there are about 50 professional publishers and there is also a much larger group of nonprofessional publishers (for whom editorial activity is not a basic activity, e.g. social and political organizations, universities, scientific societies, governmental offices, local government offices, cultural institutions etc.)[18].

Professional publishing houses release only 30% of the titles, but they are responsible for about 90% of the global circulation of newspapers and magazines in Poland. However, this does not mean a high concentration of the press market[19].

Analyzing the share of the largest press editors in the global press circulation in Poland, it can be considered that the degree of concentration (CR) of our market is average. In 2013, eight major publishers produced 56.1% of the global circulation output. The first place in this group belonged to the publishing company Bauer, which gathered more than 19% of the global circulation share. The successive places were taken by: Agora and Ringier Axel Springer (RAS) which on average produced every 10th copy of the press appearing in Poland, and Polskapresse Publishing House (presently named Polska Press Group), which gathered almost 7% of the global circulation share[20].

It is commonly thought that the concentration degree in the Polish press is much higher. This particularly concerns the regional press segment, where Polska Press Group is assigned almost 100% of the share, or the segment of the so-called colour press, in which Bauer concern is thought to be dominant, and which is said to hold up to "a half of the market magazines"[21]. The problem is that the authors of such

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[18] *Press Release in numbers 2010*, Warsaw 2011, http://www.bn.org [accessed 11.10.2016].

[19] Concentration level is measured by CR (Concentration Ratio). If the market share of the four largest press publishers (CR4) exceeds 50% or the shares of eight (CR8) – 75%, the concentration can be considered high. CR4 between 33–50% and CR8 between 50–75% indicate average concentration and CR4 below 33% and CR8 below 50% are not concentrated. Another measure of concentration is the Hirschman-Herfindahl index (HHI), which illustrates the level of the competition in the market.

[20] More on this topic. J. Dzierżyńska-Mielczarek, *Oblicza polskiego rynku medialnego. Tendencje i analizy przypadków*, Kielce 2015.

[21] See. S. Sieradzki, *W rękach niemieckich jest już sto procent mediów regionalnych, bez pięciu tytułów*, 6.09.2014, http://wpolityce.pl/spoleczenstwo/212554-w-rekach-niemieckich-jest-juz-sto-pro-

opinions treat the terms "press market", "magazine market" or the number of titles that are included in them and their publishers quite liberally[22]. The shares in the ranking of the largest newspaper publishers, which are based on the data of the Press Distribution Control Association[23], are treated as market shares. But, in 2014, PDCA controlled only 354 press titles, out of 6796 registered by the NL[24]. If we consider the share of the largest press publishers in the global press circulation (in 2013 it amounted to 2045 million copies[25]), it was at the level of 62.5%. Out of which, nine "foreign media concerns" reached 47% of the global circulation and ten Polish publishers got 15%[26].

Rankings of the largest publishers in Poland in terms of circulation and sales of newspapers and magazines, however, allow us to notice that they face annual declines in circulation and copy sales (Table 2).

In the past four years, Bauer Group faced copy sales decrease of 17%, Ringier Axel Springer – 18%, Polska Press Group (the sales in 2012 and 2013 calculated together with Regional Media sales) – 34%, Agora – 36%, ZPR – 11%, Edipresse – 42%, Burda – 27%.

The decrease in the sales of the printed press means lowering of the level of its readership. This is confirmed by both the systematic study of readership and the occasional analysis of the causes of rarer reading of printed press than ever before[27]. Readers read fewer various titles than they did before, they do it less regularly, and spend less and less time on reading the press[28]. The reason is mainly the increase in the number of channels providing media content (television thematic channels, web-

cent-mediow-regionalnych-bez-pieciu-tytulow and B. Bubula, *Media polskie i polskojęzyczne*, "Nasz Dziennik" 14.09.2014, http://www.naszdziennik.pl/mysl/97233,media-polskie-i-polskojezyczne.html; P. Legutko, *Idę po nową Polskę. Rozmowa z Pawłem Kukizem*, "Gość Niedzielny" 2015, No. 30.

[22] According to the Jagiellonian Institute report, the Polish press market in 2014 was divided between 19 media companies and 185 journals appear, most of which are owned by foreign publishers, which control 76% of the press market. Cf. P. Grzegorczyk, *Analiza zagranicznego kapitału w Polsce*, 14.09.2015, http://jagiellonski24.pl/2015/09/14/czy-musimy-repolonizowac-media-analiza-zagranicznego-kapitalu-w-polsce/ [accessed 10.11.2016].

[23] See. P. Pallus, *Wydawnictwo Bauer największym wydawcą prasy w Polsce. Za nim RASP i Polskapresse (raport za 2014)*, 20.04.2015, http://www.wirtualnemedia.pl/artykul/wydawnictwo-bauer-najwiekszym-wydawca-prasy-w-polsce-za-nim-rasp-i-polskapresse-raport-za-2014_1 [accessed 2.11.2016].

[24] Cf. ZKDP, *Titles controlled*, https://www.zkdp.pl [accessed 5.10.2016].

[25] Cf. BN, *Publishing Movement in Numbers 2013*.

[26] Own calculations on the basis of: *Press Release in numbers 2013*.

[27] *Diagnosis of social reading behaviour within the paper and digital press. New content accesses platforms. Transformation Press*, Millward Brown Study for Press Release Chamber of September 2013, http://www.pik.org.pl/upload/files/Raport%20RYNEK%2011-02-2014%20(R)%20word%20IWP-2.pdf [accessed 10.10.2016].

[28] The ZenithOptimedia report shows that in the years 2010–2014 the average time devoted on reading journals fell by 25 percent (from 21.9 to 16.3 minutes), and in the case of magazines – 19%. See. *Media Consumption Forecasts*, http://www.zenithmedia.pl/baza-wiedzy/article/Media-Consumption-Forecasts-4054.html [accessed 1.10.2016].

sites) and the presence of free of charge sources of substitution content for magazines (internet portals, social networking websites, blogs etc.).

Table 2. The largest publishers: number of titles, total circulation and sales (in million copies)

Publishing Group	2012			2013			2014			2015		
	Number of titles	Circulation	Sales	Number of titles	Circulation	Sales	Number of titles	Circulation	Sales	Number of titles	Circulation	Sales
Bauer	39	408.0	288.1	40	389.0	267.5	39	364.5	248.8	39	359.6	239.8
RAS	15	204.0	141.6	15	191.0	129.2	14	180.2	122.6	14	173.7	116.3
PP/PPG*	15	178.5	86.0	15	163.0	77.7	22	148.2	111.6	22	127.1	93.6
Agora	17	121.4	82.1	25	98.5	66.0	11	86.0	62.9	11	83.2	52.2
Media Reg.	13	83.9	56.2	12	73.7	49.7	–	–	–	–	–	–
Murator ZPR**	10	92.0	52.0	10	86.0	49.6	10	83.6	48.8	10	82.4	46.5
Edipresse	13	62.6	45.1	13	51.4	35.6	11	48.9	33.5	11	40.7	26.4
Burda	21	41.3	25.3	21	43.4	27.2	22	36.8	22.9	22	31.5	18.5

* In 2014 Polskapresse absorbed titles issued by regional media and is called the Polska Press Group.
** In 2014 Murator Publisher changed its name to ZPR Media S.A.

Source: ZKDP data published by wirtualnemedia.pl [accessed 1.11.2016].

Variety of the magazine market by the amount of circulation

The decline in sales and readership of the press lowers the classification limit of titles to the categories connected with the circulation amount. What makes the title belong to the group of high, medium or low journal circulation in the particular geographic market is determined by the ratio of the volume of edition to the population number at which it is targeted, and thus the importance it has in a given press system[29]. High-circulation press titles are also the ones which show the features of mass communication, i.e. which are prepared by a large, professional editorial team and directed to a large, dispersed audience. Low-circulation press titles are usually

[29] Cf. T. Mielczarek, *Współczesne polskie czasopisma wysokonakładowe*, "Rocznik Prasoznawczy" 2008, V. 2, p. 79.

prepared by small editorial teams and are intended for a specific recipients – audience groups homogeneous in terms of socio-demographic characteristics.

Along with the changes in media consumption, the amount of circulation starts to be relative. The magazines regarded as high-circulation ones are those which reach sales from 100 thousand to 200 thousand and which sold much more copies a few years ago[30]. It is worth mentioning that the average edition of periodicals published in Poland, which in 1995 amounted to almost 20 thousand declined to 11 thousand copies only in 2013[31]. Daily and weekly magazines lost the most. According to tentative calculations in the 21st century the circulation of the daily newspapers and magazines decreased by about 30%, and weekly ones decreased by 34%[32].

The number of so-called high-circulation titles declines. In 2013, 60 journals in Poland reached an average circulation of over 200 thousand copies. In 2014, 46 journals exceeded the circulation of 200,000, and in 2015 there were only 36 journals with such circulation[33]. Among the weeklies, the biggest circulation and sales belonged to the magazines with the television repertoire and the ones which formed yellow segment (gossip, entertainment and guidetainment, such as "Życie na Gorąco", "Twoje Imperium", "Dobry Tydzień" etc.). Among the biweeklies, TV guides, guides, and magazines from the people segment ("Party", "Show") reached the highest circulation and sales. Women's guides dominated among the monthlies.

The circulation level determines the cost of reaching the recipients of advertising messages. The smaller the release, the higher the cost of reaching the reader and the lower the advertising revenue. Thus the amount of circulation influences the advertising potential of the magazine.

Advertising potential of the magazines

Considering the advertising potential of magazines they can be divided into mass and elite ones. Mass magazines – due to high sales – have a low cost of reaching the recipients with advertising messages. Their recipients are, however, diversified socially and demographically. Elite magazines stand out by reaching a specific target audience (for example people who are better educated, more affluent, living in large cities), for whom advertisers pay more calculating reaching costs.

Since 2008, less and less money has been spent on advertisements in magazines. Since that time the advertising expenditure in magazines has dropped by more

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[30] On the occasion of the 25th anniversary of Prószyński Media, its founders mentioned that in 1993, the volume of "Poradnik Domowy" reached 3.3 million copies. In 2015 it was 10 times smaller. See. *Bez Was nie byłoby nas!*, http://www.proszynski.pl/Bez_Was_nie_byloby_nas_-n-934-1_2-.html [accessed 1.10.2016].

[31] BN, *Press Release in numbers 2013*.

[32] *Ibidem.*

[33] Own calculations on the basis of: *Press Release in numbers 2013* and ZKDP data.

than half (Table 3). It is worth noting that the dynamics of advertising investment decline is several times higher than the decrease of copy sales and the tendency proceeds regardless the economic circumstances.

Table 3. Expenditures on advertising in the net press in the years 2008–2015 (in PLN million)

	2008	2009	2010	2011	2012	2013	2014	2015
Dailies	795.0	651.3	610.9	555.3	440.8	341.2	315.4	280.3
Magazines	900.7	767.8	724.0	691.4	575.6	512.6	441.0	397.4
In total	1695.7	1419.1	1334.9	1246.7	1016.4	853.8	756.4	677.7

Source: Starlink, *Reports on the advertising market 2012–2015*, www.starlink.pl.

Smaller advertising expenditures in the press lowers its participation in the so--called media mix. In 2005, almost 30% of media financial means was spent on media advertising, and by 2015 this share had dropped below 10%[34].

Witold Woźniak, the President of Bauer Media Group, characterized the effect of this phenomenon in 2014:

> If the adverting expenditure in magazines keeps declining at the same pace for the next three years, segment revenue will decrease by another 40 percent. This will result in the revenue collapse of the publishing companies that will have to cut any editorial and content investment or promotional activities. The magazine prices will also be raised, which will result in sales decline and – consequently – closing down the deficit titles. Distributors will increase their margins due to lower volume of goods and closing down of retail outlets. Publishers will begin closing down unprofitable titles, in the end they will do away with the whole publishing houses. And this is a scenario for two, three years. Nothing more. Most publishers are now on the verge of profitability. There are three, four publishing houses that make money, and the remaining take radical steps to save their financial results. However, these savings are much less than the current decrease of their advertising revenue[35].

This is confirmed by losses in the press segment, which in the recent years has been faced by ZPR Media (until 2014 – Murator Publishing House) known for the edition of "Super Express", construction and interior press: in 2012 the loss amounted to 5.4 million PLN, in 2013 – a profit of 5.3 million PLN was reached, and in 2014 – the loss amounted to 20 million PLN[36].

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[34] See. *Statistical Fact Book 2010*, www.impactor.pl [accessed January 2012] and Starlink, *Reports on the advertising market 2012–2015*, www.starlink.pl.

[35] J. Dziwisińska, *Kiedy zabraknie prasy. Wywiad z Witoldem Woźniakiem*, 22.08.2014, http://mediamarketingpolska.pl/artykuly/174807,kiedy-zabraknie-prasy [accessed 2.11.2016].

[36] See. G. Kopacz, *Arena Benbenka*, "Press" 2016, No. 4, pp. 56–60.

The profitability of the press segment in Agora S.A. also declines (Publisher of "Gazeta Wyborcza", free of charge "Metro"[37] and several magazines). In 2012, the segment's profits amounted to PLN 54.6 million, in 2013 – to 53.9, and in 2014 – only to 11.6[38].

Conclusion

Although the magazine market is a separate segment of the press market, its borders are blurred due to media convergence. Incomplete, late and only approximate data on the number of titles, their global circulation, the number of publishers, and their advertising potential makes it problematic to determine its size and structure. But in terms of the number of titles and the global circulation – the magazine market is the largest segment of press production. Magazines, alike the entire printed press, are struggling with the decline of readership and advertising influence. Different types of magazines lose their readers with varying intensity, mainly due to the socio-demographic composition of their audience. The wide content and target audience variety and the lack of precisely defined classification criteria, however, hinder the analysis of the market readers.

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[37] In September 2015 "Metro" was transformed into "Metrocafe.pl". The newspaper "Metrocafe.pl" was closed down on October 14, 2016, and its website at the end of 2016.

[38] Cf. Agora, *Annual Reports Agora S.A.*, http://www.agora.pl [accessed 2.11.2016].

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Summary

The aim of the article is to analyze the magazine market in Poland. Despite the insufficiency of data on its size and structure, the author tries to determine the direction of market development in terms of quality and quantity. She shows the changes in the number of the titles and circulation, the decrease in their periodicity, the concentration degree of the market and its advertising potential.

RYNEK CZASOPISM W POLSCE

Streszczenie

Celem artykułu jest analiza rynku czasopism w Polsce. Autorka, mimo niedostatków danych dotyczących jego wielkości i struktury, próbuje ustalić kierunek rozwoju rynku pod względem ilościowym i jakościowym. Ukazuje zmiany w liczbie tytułów i nakładów czasopism, spadek ich periodyczności, stopień koncentracji rynku oraz jego potencjał reklamowy.