

## Highlight

### From Nmpp to Presstalis



In this second issue of Connectiv'News, we look back at the results of 2009 and look forward to the events and opportunities of 2010.

#### Summary

- p.2/3 Sales in 2009
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#### key figures in 2009

- number of countries : **27**
- number of titles imported : **1185**  
(**100** newspapers &  
**1085** magazines)
- total import sales (in volume) :  
**19** millions copies
- turnover trend magazines  
2009 vs. 2008 : - **4.5%**
- turnover trend newspapers  
2009 vs. 2008 : - **8.3%**

2009 was a difficult year for everyone in the press industry. The global economic crisis hit us all hard as consumers and advertisers adopted a cautious attitude to every purchase. In the French market, trends in sales of domestic press followed this movement with a decrease in overall turnover by -6.6% compared to 2008.

The international press in France saw similar trends with total sales down by -6.8%. Turnover on sales of newspapers were the hardest hit with a year on year decrease of -8.3%. Magazines performed better with an annual decrease of -4.5%. High cover prices and fewer foreign visitors were two important factors in this drop, together with changing consumer habits affecting reader loyalty resulting in irregular newsstand purchases.

So we start 2010 looking forward to the events and opportunities for the season ahead. The UK elections in May will create a much-needed dynamic for the British press with the promise of a close (and exciting!) result. The World Cup in June/July also offers a great opportunity to attract more sales. And we are all looking forward to a long, hot summer with a return of foreign visitors to the world's No1 tourist market!

The end of 2009 also saw an important change for our company with a move to a sparkling new head office building to the East of Paris, together with a new name, *Presstalis*, and a new commitment to quality and innovation for the challenging times ahead.

**Philip Kucharski**  
Director of Import

[www.findthepressinfrance.com](http://www.findthepressinfrance.com)

the easy way to find out where your title is on sale in France

**Newspapers**

**Contrasting newspaper sales in 2009 closely linked to tourist figures and the global economic crisis.**

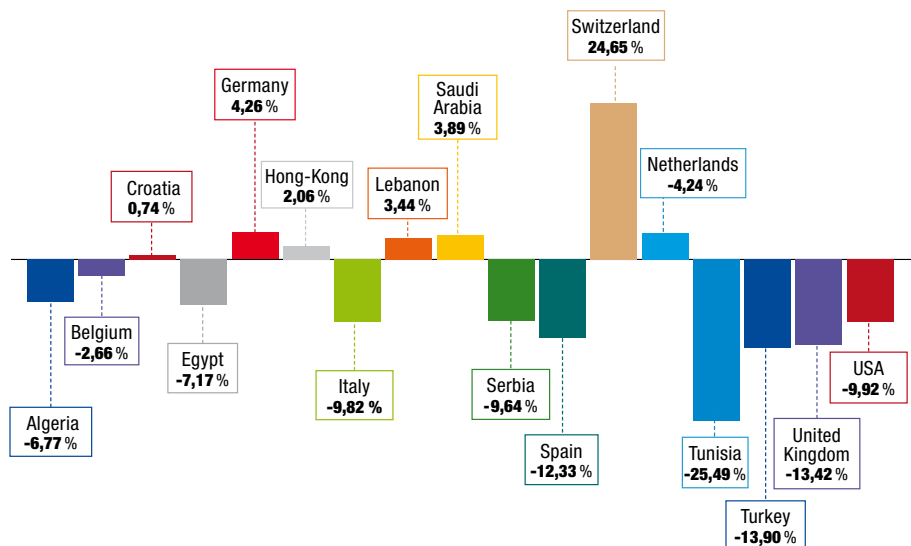
Overall sales in France in 2009 for foreign newspapers fell by -9.8% in volume and 8.3% in turnover. UK dailies suffered the biggest decreases as the strong euro (weak pound) and economic uncertainty continue to impact consumer habits. The number and frequency of purchases also decreased sharply, particularly in ex-pat resident areas, together with fewer visitors from Great Britain. US, Spanish and Italian newspapers followed similar sales patterns, although to a lesser degree.

The Turkish, North African and Serbian dailies continue their decline as the younger generations of immigrant readers switch to the national press.

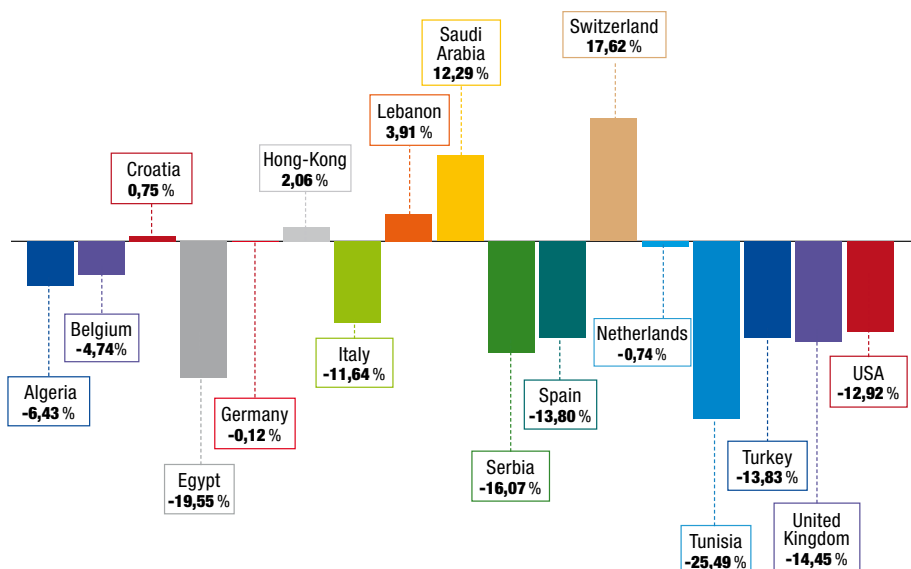
The best-performing dailies in 2009 were from Germany, Switzerland and Holland with increased sales over the summer period. The German and Dutch newspapers were helped by local printing of Bild, De Telegraaf and AD with day A distribution in the South of France. The growth from Switzerland came mainly from the return of Blick to newsstands during the summer season in the Mediterranean area. Dailies from Saudi Arabia also benefitted from increased tourism in 2009.

## Sales of foreign press in 2009

### Evolution per country - Newspapers (Turnover) January - December 2009 vs. 2008



### Evolution per country - Newspapers (Volume) January - December 2009 vs. 2008



### Magazines

**High cover prices and fewer tourists affected sales of foreign magazines in 2009.**

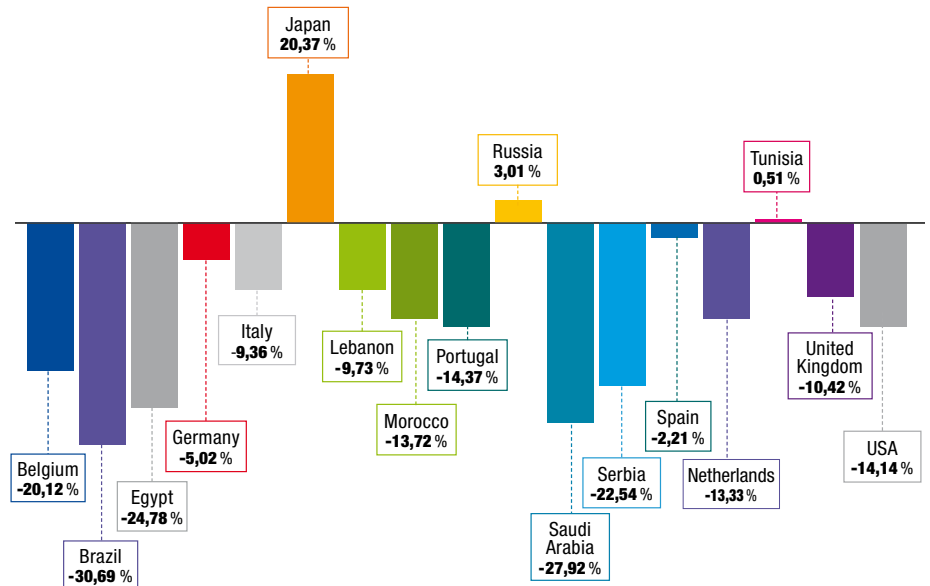
The sales of foreign magazines in France in 2009 saw a -4.5% decrease in volume and turnover. The relatively high cover prices compared to home markets (up to 3 times for some titles), together with more cautious purchasing habits, were two important factors influencing sales. All nationalities were affected by this as consumers become more selective and buy fewer titles with more irregularity.

Nevertheless, Spanish magazines performed well in spite of the drop in sales of daily newspapers. German and Dutch magazines were supported by a good summer season and more stable reader loyalty. New Russian and Japanese titles brought an increased selection to tourists and residents with high demand (undeterred by high covers prices!).

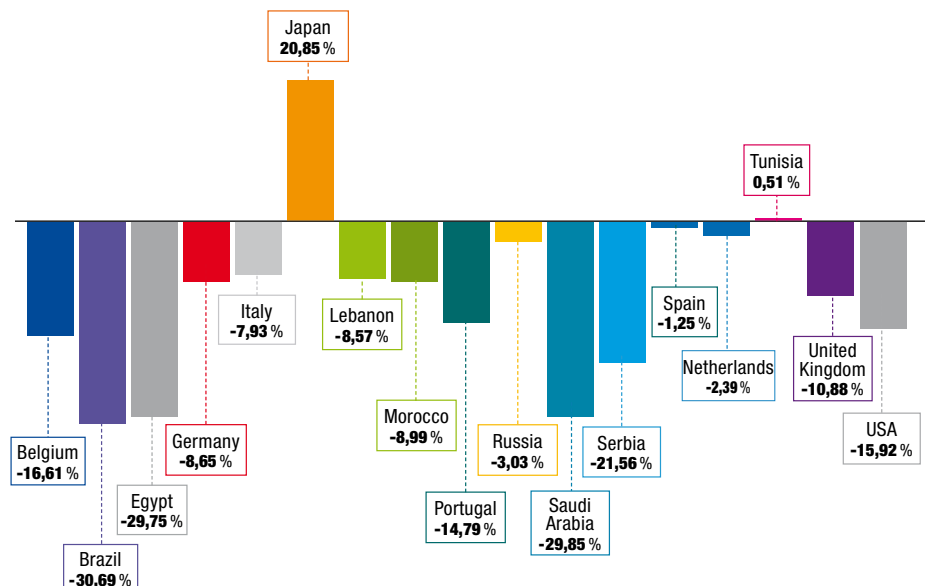
UK and US magazines both suffered from a strong euro compared to the pound and dollar resulting in high cover prices. The resident ex-pat readers were the hardest hit by this. However, sales of the last quarter 2009 showed some improvement compared to the beginning of the year.

## Sales of foreign press in 2009

### Evolution per country - Magazines (Turnover) January - December 2009 vs. 2008



### Evolution per country - Magazines (Volume) January - December 2009 vs. 2008



**Analysis**

**Market shares of sales for foreign magazines changed in 2009**

with Germany overtaking the UK as No1 nationality. These two countries now represent 66% of all foreign magazines sold in France. Market shares for US, Italian and Spanish titles remain stable. We continue to explore new titles from Eastern Europe, Asia and Latin America.

**The UK still retain the highest market share of daily newspapers at 37%**

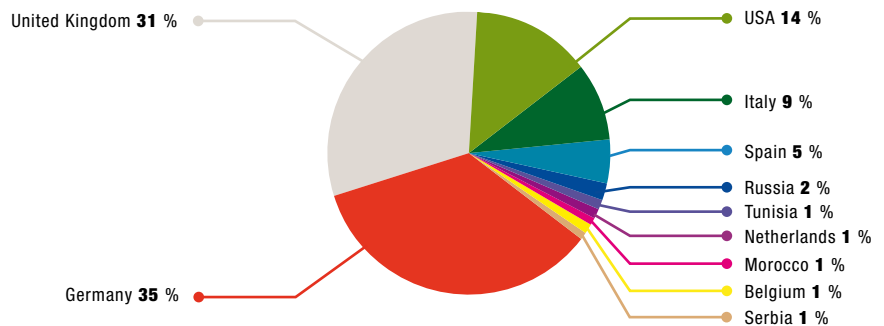
in spite of the drop in sales in 2009. Germany, Netherlands and Belgium have all gained market share compared to 2008. Turkey has lost 2% market share, with a 1% drop for US and Spanish newspapers. Middle East and North African titles maintain a stable market share.

**Best-performing categories in 2009 were again the womens and celebrity titles, which continued to grow in spite of high cover prices and increasing number of titles.**

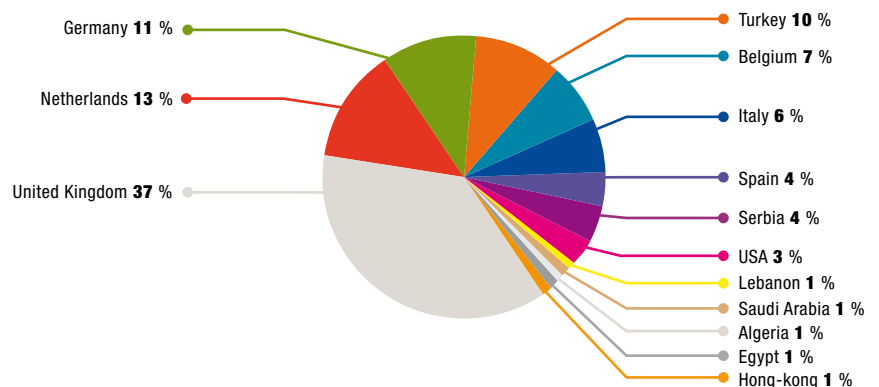
News and current affairs suffered in the same way as daily newspapers followed similar trends. Adult, mens fashions and gaming titles (crosswords/sudoku etc.) continued to drop sharply as well as price-sensitive titles in the family/practical category.

**Market shares**

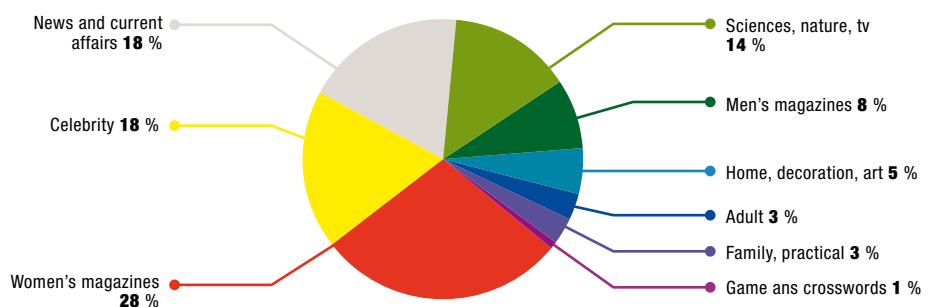
**Magazines Market Share per country (sales in Volume) January - December 2009**



**Newspapers Market Share per country (sales in Volume) January - December 2009**



**Sales per Category (Volume) January - Dec. 2009**



**Overview**

**2009 saw a drop in the number of foreign visitors to France by -11.8% compared to 2008.**

The biggest decrease came from European visitors (-16.9%), particularly from the United Kingdom (-22.8%) which represents over a quarter of all foreign visitors to France in 2009.

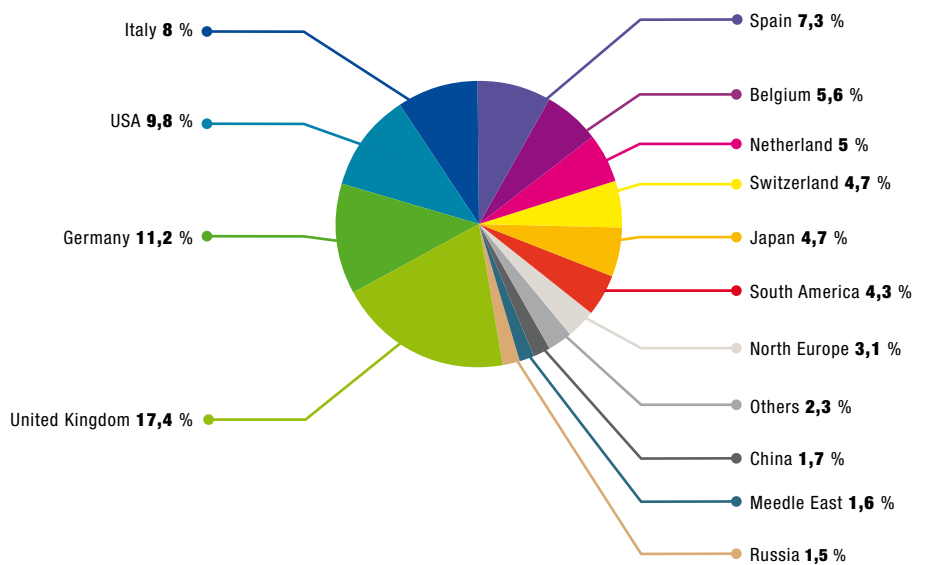
The relative drop in value of sterling compared to the strong euro created surging prices for countries outside of the Euro-zone. Italian, Spanish and Scandinavian tourists also saw important decreases in numbers. Visitors from the US decreased by -5.3%.

In spite of this France still remains the No1 tourist destination in the world. Increased numbers of visitors came from Asia and the Middle East with +25.2% more Chinese tourists compared to 2008 and a return of the Japanese (+18.4%). French tourists made up for the differences in many areas with an increase of 1.2% compared to 2008.

The western and south-western regions of France, as well as the Languedoc, saw the biggest increase in tourists during the summer period with campsites showing the biggest growth. 3 star hotels were the worst hit in the hotel categories. The Paris region and the Côte d'Azur are still the No1 destinations for foreign visitors to France with short stays (average 4 days) mainly in hotels.

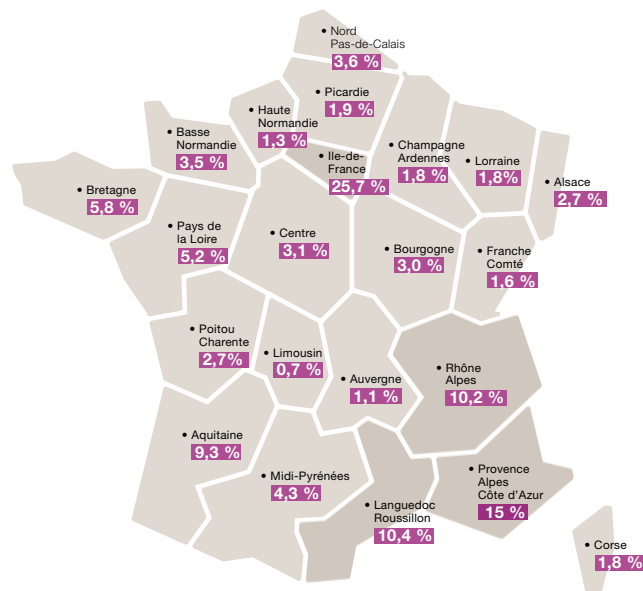
**Tourism in France**

**International Visitors to France**



**Most visited regions by foreign visitors in France**

(% of total nights spent in hotels and campsites)



Dates

## Events calendar 2010

### Main Events and Trade Fairs in France

#### March 2010

**Ski Championships**, Méribel - March 27 to April 9  
**Salon International du Prêt-à-porter (ready-to-wear)**, Paris, Carrousel du Louvre - March 3 to 11  
**Salon du livre (Book Trade fair)**, Paris, Porte de Versailles - March 26 to 31  
**International Tourism fair**, Paris Expo, Porte de Versailles - March 18 to 21

#### April 2010

**Foire Internationale de Paris (International Paris Fair)**, Paris, Porte de Versailles - April 29 to May 9

#### May 2010

**Cannes Film Festival** - May 12 to 23  
**Grand Prix de Monaco (Monaco Formula One)** - May 20 to 23  
**Roland Garros (French Open)**, Paris - May 23 to June 6  
**United Kingdom General Election**, May 6  
**Rugby H-Cup**, Finale in Paris Stade de France, May 22

#### June 2010

**Mode Masculine (Men's Fashion)**, Paris, Carrousel du Louvre - June 24 to 27  
**Football World Cup**, South Africa - June 11 to July 11

#### July 2010

**Haute Couture**, Paris, Carrousel du Louvre - July 5 to 8

#### September 2010

**Salon Maison-Objet (Home Decoration)**, Paris, Villepinte - September 3 to 7  
**Cannes Boat and Yacht show** - September 8 to 13  
**Monaco Yacht Show** - September 22 to 25  
**Mondial de l'automobile (Car trade show)**, Paris, Porte de Versailles - October 2 to 17  
**Salon International du Prêt-à-porter (ready-to-wear)**, Paris, Carrousel du Louvre - September 29 to October 7

#### October 2010

**FIAC, Foire Internationale des Arts Contemporains (Art International fair)**, Paris, Cour Carrée du Louvre - October 21 to 24

#### December 2010

**Salon Nautique de Paris (Nautic of Paris)**, Paris Expo, Porte de Versailles - December 3 to 12

### Main Events and Trade Fairs in the world

#### February-March 2010

**Rugby 6 Nations championship**, February 6 to March 20

#### May 2010

**United Kingdom General Election**, May 6  
**Rugby H-Cup**, Finale in Paris Stade de France, May 22

#### June-July 2010

**Football World Cup**, South Africa - June 11 to July 11

### Description

#### Description of the promotion:

- Special Posters at Champs Elysées Kiosks
- Retail merchandising and placing of POS materials in Paris and French Riviera
- Maximizing of visibility in each outlet
- Draw adjustment and retail checking of each retailer
- Prizes and incentives to the best-selling outlets
- Communication on our national retailer website

**Promotional operation cost:**  
1850€ per title excl. VAT

**For 2 weeks,**  
from April 26 to May 9, 2010  
(dates to be confirmed)

## Promotions

### Special promotion UK Elections: May 2010

**180 of the best-selling outlets in Paris and French Riviera**

**Paris: 100 outlets**

**French Riviera: 80 outlets**

(Cannes, Nice, Monaco, Fréjus, St Tropez...)



**If you have any questions please contact  
Hoda Landier / promotion Manager.  
Phone: +33 1 49 28 73 25 / fax: +33 1 49 28 76 22**

### Description

#### Description of the promotion:

- Foreign Dailies Competition during the Football World Cup 2010: Retailers + Publishers
- 50 Retailers (Paris + Riviera Coast)
- 2 mains criterias: Sales evolution & National team results

#### Period:

**4 weeks Promotion:**  
From the 11th June 2010  
to the 11th of July 2010

**Publisher Participation:**  
700€ per title excl. VAT

#### Actions and promotions

- Special posters « Newspapers World Cup 2010 »
- Retail merchandising and placing POS materials in the selected outlets
- Maximising visibility & Retail checking in each outlet
- Prizes and incentives
- Weekly report of the competition
- Communication retailer website.

## Promotions

### 2010 Newspapers World Cup



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Hoda Landier / promotion Manager.  
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## Promotions

### Description

#### Sélecto Plus Maison de la Presse

A display in the window  
+ a display hooked on the shelf  
space in 210 Maison de la Presse  
located in the provinces

**Period: 7 days**

**Cost: 1 700€ excl. VAT**



#### Champs Elysées Poster Campaign

8 Posters facing in 8 kiosks  
at Champs Elysées

**Period: 7 days**

**Cost: 1040€ excl. VAT**



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