

THE CURRENT STATE OF THE JAPANESE MAGAZINE PUBLISHING

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I. The Position of Magazines

The discussion of magazines should be preceded by an identification of the concept of publishing in its entirety including the electronic media. In this digital era, publishing can be defined to include activities like the reproduction, distribution, sale and dissemination of information through printed materials, for example books and magazines, and electronic methods like CD-ROM, DVD and electronic magazines.

The types of published materials are presented in Table 1. As indicated therein, publishing can be broadly divided into paper form, e.g. books and magazines, and the

electronic form like CD-ROM, DVD and electronic magazines.

The electronic form of publishing, generally called electronic publishing, is defined as the distribution of computerized data in the form of CD-ROM, DVD or through networking. Electronic media is still in its infancy and its share is less than 1% of the print media. Consequently, the focus of this article will be on the print media.

II. The Publishing Industry in Japan

As indicated in Figure 1, the publishing industry attained a peak of 3,130,920,000,000 yen in 1997 after which the publication of

Table 1
Type of Publications

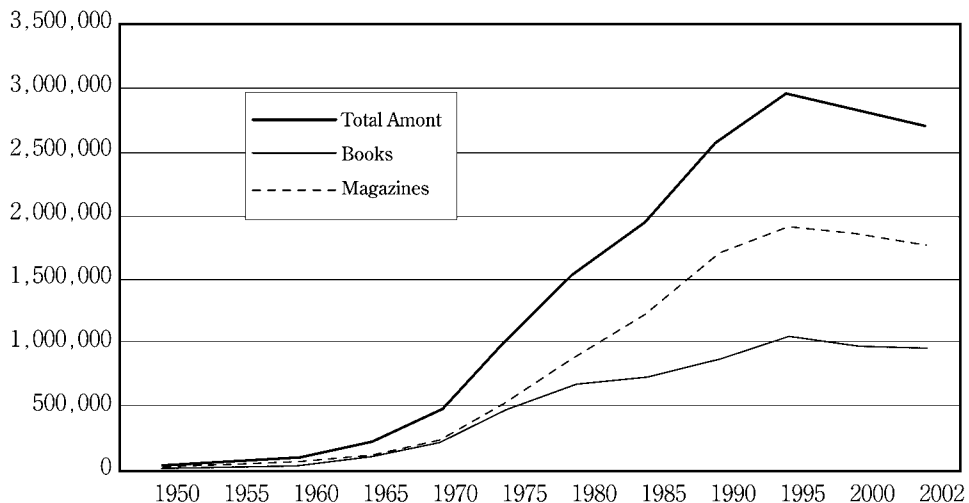
Publishing	{	Paper Media	{	Books..... Trade Books, Series, Collected Works, Multi-volume books, Encyclopedia, Dictionary, Pictorial Books, Picture Books
		Electronic Media		Mook Magazine Publishing Maps/Atlas Music Books Package type-CD-ROM, DVD, Tape Network-type-Website, Mail Magazines

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both books and magazines started to decline. This decline can be attributed to the diffusion of the Internet and mobile phones among youth and the diversification of the means of acquiring information due to the increase in bookshops selling used books, e. g., Book Off, and Comic Cafes. Changes in the use of time and money, the environment of the publishing media and the life-style of consumers have also contributed to the decline in the publishing industry. Furthermore, according to the *Annual Publishing Index* (2002), a major contributing factor to the downward trend in the publishing industry is the population structure changes such as the decline in the birth rate and the aging population.

Another major feature of the publishing industry is the decline in the sales of books. Comparing revenue from sales of books and sales along with the advertising revenue of magazines, with the exception of 1966 and 1968, magazines had a greater share. The exclusion of advertising revenue from total revenue from magazines does not change the picture. Even when advertising revenue is excluded, revenue from books was greater than that of magazines only in the 7-year period of 1964-71. After peaking at 68% during the weekly magazine boom in 1959, the share of magazines has since remained around 65%. The Japanese publishing media can therefore be said to be magazine-led.

Figure 1
Japanese Publishing Industry Sales
(million yen)



Note: Basis of advertisement statistics were changed in 1985.

Source: *Annual Publishing Index* and *Dentsu Advertisement Annual*.

III. Magazines

1. The number of magazines and print copies

A magazine is a form of print media published periodically in booklet form. According to the Constitution of Japan, there are no restrictions on their publication. As a result, it is quite difficult to obtain adequate statistics on the number of magazines and the number of copies published. Currently, it is estimated that over 23,000 magazines are in circulation. According to the *Publishing Yearbook*, 4,417 magazines were published in 2002 while the *Annual Book Publishing Index* puts the figure at 3,320. This article will be based on the multifaceted *Annual Book Publishing Index* data. The *Annual Book Publishing Index* collects data through wholesalers and others selling directly to the reading public.

The number of magazines published increased considerably from 1990 to 2002 (3,320) in spite of the collapse of the bubble. The trend in the number of copies published was quite interesting. After peaking at 4,728,910,000 copies in 1997, the number of copies published decreased considerably. In 2002, only 3,859,860,000 copies were published. The decrease in the number of copies in the midst of an increasing number of magazines could imply that the publication of new magazines is a frantic effort to in-

crease the number of copies published.

The estimated revenue from sales of magazines including comics was 1,263,800,000,000 yen in 1990, peaking at 1,564,400,000,000 yen in 1997. Thereafter, there was a downward trend in the sales of magazines reaching a low of 1,361,500,000,000yen in 2002.

2. Classification of Magazines

(1) Type of Publications

Magazines can be classified from several viewpoints. They can be classified by format size, genre (readership and contents), area of distribution, objective and subject of publication, whether distributed free or sold, etc. Furthermore, the period of publication can also be a basis of classification. Magazines are published monthly, weekly, every ten days, twice a month, bi-weekly, bi-monthly, quarterly, annually, etc. Monthly magazines are the most dominant. The share of monthly magazines was 59.3% in 2002 followed by bi-monthly, quarterly, bi-weekly, published twice a month, weekly, respectively. After peaking at 66.1% in 1991, the share of monthly magazines has since declined.

(2) Format Size of Magazine

Typical format sizes of some of the major magazines published in Japan are as follows ; B6, A5-type *Bungei Shunju*, B5-type *Weekly Asahi*, modified B5-type, AB *Shukan Josei Jishin*, A4-*Weekly Playboy*, modi-

fied A4 *an an*, etc.

There is the trend towards increasing the format sizes of magazines in Japan. Most magazines are going to a larger format. The format sizes of some of the magazines have increased from A5 to B5 and modified B5 to AB and, finally, A4 and modified A4. B5 and modified B5 occupied the greatest share of 54.2% in 1976, 44.7% in 1990 but declined to 35.9% in 2002. On the other hand, A4 and modified A4 occupied the third position in 1976 with a share of only 12.1%. However, A4-sized magazines had the second largest share of 25.6% in 1990 and finally took the leading position in 2002 with a share of 38.5% thus outnumbering B5 and modified B5-sized magazines.

(3) Genre

The genre classification of magazines in Japan is as follows : children, women, popular, general, literature, entertainment, art, music, home, hobby, sports, economics, social, current issues, philosophy, references, language, education, history and geography, law, science, engineering, medicine, agriculture, etc.

From 1992, classified by the number of magazines, 9 genre groups had a publication share of over 5% each. The number of magazines in each of these groups in 2002 were as follows ; popular 627, hobby 503, engineering 317, medicine 256, home 215, children 205, economics 165, sports 160 and general 145.

On the other hand, classified by the number of copies, 6 genres had a publication share of over 5%. The number of copies, in each of these groups in 2002, were as follows : popular 1,192,930,000 (30.9%), children 750,180,000 (19.4%), general 387,340,000 (10%), hobby 325,700,000 (8.4%), women 270,960,000 (7%) and home 222,160,000 (5.8%).

Popular magazines, which had the greatest share in terms of number of magazines and number of copies published, also had the highest revenue of 533,780,000,000 yen in 1997.

It is worth nothing that the magazines analyzed above are mostly profit-oriented publications. However, the publication of free magazines with coupons attached, have been on the increase in the major cities.

3. The Media Characteristics of Magazines

The media characteristics of magazines can be broadly classified as segmentation and evolutionary. Segmentation refers to the classification of readers according to gender, age, occupation, interests, hobby, lifestyle, income and assets, etc. Diversification, which is usually considered a basic characteristic of magazines, is the result of segmentation. The segmented nature of magazines has been widely analyzed by various researchers. However, our major contri-

bution in this paper is to identify and analyze evolution as another characteristic of magazines.

In response to environmental conditions, the evolutionary character of magazines will depend on the contents, fractionalization of readers, the size of magazines, etc. In Japan, women magazines are the most widely read and have the widest circulation in terms of number of magazines and print copies. It also forms the largest genre group. Women magazines numbered 131 in 2002 with a print volume of 270,960,000 copies. The segmentation of women magazines is quite phenomenal. In 1970, the readership spanned a mere five generational groups but by 2000, it had more than doubled to 11 generational groups. In 1970, the five target age groups were 14-17 years, 18-22 years, 23-26 years, married women and others. However, in 2000, they were re-classified into 11 groups, namely, 12-14 years, 14-17 years, 18-22 years, 23-26 years, 25-29 years, late 20 to early 30, 30s fashion, over 40 years, married women, and others.

Furthermore, within the same age group, further subdivisions have been made. For example, within the 18-22 years age group, there were only the traditional fashion magazines until the early 1990s. However, in the latter part of the 1990s, street fashion magazines were also being published for the same age group.

The principle behind the age classification of women magazines could be attributed to Confucianism that places great importance on precedence of age as a sense of value. Every generational group is strongly expected to have a peculiar lifestyle and play a distinct societal role.

Another special feature of magazines is the evolutionary character of the format size of the magazine. As previously mentioned, there is the trend towards increasing format sizes of magazines. Thus, the evolutionary character of magazines, i.e., contents, minute classification of readers and the format size of magazines, greatly affect the profitability of magazine publishing houses.

4. Comic Magazines

Out of the nine magazines with over one million print copies each, eight of them are comic magazines. A special feature of modern Japanese publishing culture is the greater share of comic magazines providing entertainment. The share of comic books and magazines has been on an upward trend since the early 1990s. Since 1991, the share of comic books and magazines has been over 35%. However, a new record share of 38.1% was attained in 2002. Comic magazines alone formed 24.6% of the entire magazine market in 2002. The magazine *Boy's Jump Weekly* alone hit a historical record of 6.48 million copies in 1993.

Regardless of the large publication

share held by comic magazines, the preference of children for television games has led to a decline in the comic reading public. Furthermore, the advent of new second-hand bookstores and the increase in comic cafes have drastically affected initial sales of comic magazines and books. Consequently, revenue from sales of comic books and magazines in 2002 was at the same level as 1992 although print copies were at the 1989 level.

IV. Major Publishing House Dependence upon Magazines

As previously mentioned, the Japanese publishing industry is magazine-led. The

proportion of revenue magazines of the major publishing houses in 2001 and 2002 were as follows ; Kodansha 81.5%, Shogakukan 76.5% and Shueisha 85.1%.

Publication of magazines is indispensable to major publishing houses with their high labor cost in higher salaries paid to a greater number of employees. However, once a new publication becomes successful, the publishing house is assured regular revenue from sales and pre-paid advertising charges.

V. Magazine Advertisement

Advertising revenue is a major source

Table 2
Million Seller Magazines in Japan
(2002 estimates)

Rank	Type	Name of Magazine	Publisher	Circulations (million)
1	W	<i>Shukan Shonen Jump</i> (Boy's Jump Weekly)	Shueisha	325
2	W	<i>Shukan Shonen Magazine</i> (Boy's Magazine Weekly)	Kodansha	300
3	M	<i>Gekkan the Television</i> (Television Monthly)	Kadokawashoten	155
4	W	<i>Shukan Young Jump</i> (Weekly Young Jump)	Shueisha	138
5	W	<i>Shukan Shonen Sunday</i> (Weekly Boy's Sunday)	Shogakukan	135
6	M	<i>Koro Koro Comic</i> (Koro Koro Comic)	Shogakukan	134
7	W	<i>Young Magazine</i> (Young Magazine)	Kodansha	120
8	M2	<i>Big Comic Original</i> (Big Comic Original)	Shogakukan	118
9	M	<i>Chao</i> (Chao)	Shogakukan	105

Note: M=Monthly; W=Weekly; M2=Twice a month

of revenue for the magazines business. This is especially so for the publication of mass magazines. With the exception of comic magazines, most major publishing houses set the sales price of mass magazines below the production cost. This strategy is to ensure adequate sales volume that will secure substantial revenue from advertising based on Theodore Peterson's principle for magazines in the twentieth century. For example, the production cost for *VIVI*, a fashion magazine published by Kodansha and targeted at young women, is 700 yen but the selling price is fixed at 600 yen.

In Japan, magazine advertising forms 7.1% of overall advertising expenditures. In 2002, television advertising was the highest with 33.9% followed by newspaper advertis-

ing at 18.8% and newspaper handouts 8%, respectively. The major products advertised in magazines are cosmetics, toiletries, fashion accessories, etc.

VI. Magazine Distribution Channels

In Japan, most magazines are distributed through three main channels; wholesalers (bookstores, convenient shops), direct wholesalers (vendors at railway stations, kiosks) and street stands. According to a survey by the Fair Trade Commission in 1995, the share of magazines sold through bookstores was 57.2%, 15.2% through CVS, direct wholesalers and street stands 11.8%. Only 5.2% was sold directly by the publishing houses.

