

BOARD OF TRADE

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[HA 251]

*The Report on the
Census of Production
for 1954*

Volume 10: Industry J

NEWSPAPER AND PERIODICAL
PRINTING AND PUBLISHING



*Presented by the Board of Trade to Parliament in pursuance of the
Statistics of Trade Act, 1947 (10 & 11 Geo. 6 Ch. 39, Sec. 7)*

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The Report on the Census of Production for 1954

VOLUME 10 INDUSTRY J

NEWSPAPER AND PERIODICAL PRINTING AND PUBLISHING

THIS REPORT on the Newspaper and Periodical Printing and Publishing Industry relates to establishments engaged wholly or mainly in the printing and publishing of newspapers, magazines, trade journals, etc. It includes newspaper and periodical publishers who do not do their own printing and printers of newspapers, etc. working on commission.

This industry corresponds to minimum list heading 186 in the Standard Industrial Classification.

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IMPORTANT NOTES and definitions appear on the next page. In interpreting the data in the tables, it is essential to bear these in mind.

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The following notes describe terms in general use in the tables of the report. More detailed explanations of the terms used and a description of the scope and method of taking the census are given in the separate booklet entitled 'The Report on the Census of Production for 1954 - Introductory Notes' (price 1s. 6d. net).

Industrial Classification: Establishments are classified to industries according to the nature of their output and, as far as possible, in conformity with the Standard Industrial Classification. Certain products are identified as the principal products of individual industries, the principal products for a given industry being of a similar nature or commonly associated in production. The principle of classification normally followed is that an establishment is classified to an industry if its output of the principal products of that industry accounted for a greater proportion of the value of its output than did its output of the principal products of any other industry.

Specialist producers normally comprise those establishments 50 per cent. or more of whose total output by value is accounted for by the characteristic products of the specialist group.

Intermediate products: For some industries figures are given showing the total quantities made during the year of intermediate products, i.e., products which may be further processed in the establishments in which they are produced.

Larger establishments: The information given in the report relates mainly to 'larger establishments', i.e., establishments of firms employing on the average more than 10 persons. In most cases an establishment comprises the whole of the premises under the same ownership or management at a particular address (e.g., a mine or factory). Offices, warehouses, laboratories and other ancillary places of business situated apart from the producing works are not regarded as separate establishments and are included in the return for the works.

Small firms are those employing on the average 10 or fewer persons.

The estimates for the industry as a whole given in Table 1 are normally obtained by increasing the other items shown in the same proportion as total employment.

Gross output (production) is the total value of goods made and other work done during the year: it is obtained by adjusting the value of sales and work done during the year for changes in the value of stocks of products on hand for sale and work in progress.

Net output is the amount left after deducting from the value of gross output the aggregate of the cost of materials and fuel used, the amount paid for work given out and, for 1951 and 1954, any transport payments made. This represents the value added to materials by the process of production, and constitutes the fund from which wages, salaries, rents, rates and taxes, advertising and other selling expenses and all other similar charges have to be met, as well as depreciation and profits.

Sales means sales during the year of goods made in the establishment covered by the return or made on commission for it, whether produced in the year or not. The value of sales is the net selling value, i.e., the amount charged to customers, whether on an ex-works or delivered basis, and net of any trade discounts, agents' commissions, allowances for returnable cases, purchase tax, etc. For goods charged on a delivered basis to customers overseas, firms were required to give the f.o.b. value.

Materials and fuel: The total cost of materials and fuel purchased includes all purchases during the year of materials for use in production, and of fuel (includ-

ing oil, gas and electricity) for all purposes: packing materials, including the full cost of returnable cases when first purchased; workshop and office materials; water charges; materials for repairs to buildings, plant and vehicles when carried out by firms' own work-people included in their returns; consumable tools; and parts for machinery purchased as replacements. Purchases of goods for merchandising are excluded. The cost of materials and fuel used, given in Table 2, is obtained by adjusting purchases for changes during the year in the value of stocks.

Stocks: Firms were required to give stocks of materials and fuel, products on hand for sale, and work in progress, at income tax values.

Customs and Excise Duty paid on materials purchased is normally included in the cost of materials. Finished goods are similarly valued as they were sold, duty-paid or duty-free. The net amount of any duty paid is deducted in arriving at net output.

Employment: Total employment includes working proprietors, administrative, technical and clerical employees, and operatives, but excludes outworkers, canteen employees and persons engaged in merchandising or any other activity not covered by a firm's return, who are shown separately as excluded employees. Employees are persons on the pay-roll (i.e., persons whose National Insurance cards were held by employers), whether employed full-time or part-time.

Working proprietors are proprietors of businesses other than limited companies, together with members of their families who worked in the business without receiving fixed wages or salaries. Any persons working less than half the normal hours are excluded. For Northern Ireland directors of limited companies (other than those paid by fee only) are also included.

Administrative, technical and clerical employees include directors, other than those paid by fee only (except in Northern Ireland); managers, superintendents and works foremen; research, experimental, development, technical and design employees (other than operatives); draughtsmen and tracers; travellers; and office (including works office) employees.

Operatives include all other classes of employees, i.e., broadly speaking, all manual workers.

Outworkers are persons employed by the firm who work on materials supplied by the firm in their own homes.

Wages and salaries include all overtime payments, bonuses and commissions without any deductions for income tax, insurances, contributory pensions etc. They exclude payments to working proprietors.

Capital expenditure includes expenditure on new building work, and on plant, machinery and vehicles, charged to capital account during the year, including any transport and installation costs involved. It includes expenditure in respect of establishments in Great Britain which had not begun production before the end of the year (which has not previously been included in the Census of Production reports for individual industries).

Symbols used:

- .. for not available
- for nil or negligible (less than half the final digit shown).

Where figures are rounded, e.g., given to the nearest £ thousand, there may be apparent slight discrepancies between the sums of constituent items and the totals shown. In some cases, figures have been combined with others of a similar nature where publication of separate details might disclose information relating to an individual undertaking.

Industry summary

Estimates for the industry as a whole

TABLE 1

	United Kingdom			Scotland	Wales
	1948	1951	1954	1954	1954
	£ million	£ million	£ million	£ million	£ million
Gross output (production)	108.9	164.3	220.4	14.74	2.62
Net output	73.9	93.5	118.6	8.86	1.76
Total stocks and work in progress					
At beginning of year	7.8	8.7	13.3	1.22	0.09
Change during year	+ 1.4	+ 5.4	- 0.5	- 0.07	-
Capital expenditure less disposals (a)	2.1	4.4	6.1	0.64	0.05
Wages and salaries	37.1	49.0	67.4	5.42	0.86
Total employment (including working proprietors)	Thousands	Thousands	Thousands	Thousands	Thousands
	87.3	99.0	110.9	9.86	1.97

(a) Capital expenditure on new building work, plant, machinery and vehicles (including (except in 1948) that incurred in Great Britain for establishments not yet in production), less amounts received for plant, machinery and vehicles disposed of.

Summary of returns received

TABLE 2

	Unit	Great Britain	United Kingdom	
		1948	1951	1954
FIRMS EMPLOYING ON AVERAGE MORE THAN 10 PERSONS				
Number of establishments	No.	542	590	624
Total value of sales and work done	£'000	106,468	161,318	217,146
Products on hand for sale	"	1,437	2,406	3,208
and work in progress	"	+ 608	+ 559	+ 61
Gross output (production) (a)	"	105,291	161,877	217,207
Purchases of materials and fuel	"	23,560	52,221	67,282
Stocks of materials	"	6,063	6,159	9,946
and fuel	"	+ 748	+ 4,715	- 577
Cost of materials and fuel used	"	22,812	47,506	67,859
Payment for work done on materials given out	"	7,357		
Authors' royalties, copyright payments, payments to contributors and press agencies, and editorial, artists' and readers' fees, less payments received from authors	"	3,674	11,031	18,144
Payment for transport (b)	"	1,785	4,113	6,574
Net output	"	71,448	92,114	116,882
Average number of employees	No.	50,904	59,296	66,167
{operatives	"	33,419 (c)	38,198	43,009
{others	"	17,485	21,098	23,158
Total employment (d)	"	84,383	97,579	109,269
Net output per person employed (d)	£	847	944	1,070
Wages and salaries	£'000	19,303	26,523	38,005
{of operatives	"	16,578	21,764	28,409
{of others	"	2,725	4,759	9,596
Capital expenditure	"			
New building work (e)	"	248	558	1,034
Plant and machinery	"	1,670	3,601	4,480
{acquisitions (e)	"	124	295	353
{disposals	"	1,546	3,306	4,127
Vehicles	"	290	586	925
{acquisitions (e)	"	62	133	201
{disposals	"	228	453	724
FIRMS EMPLOYING ON AVERAGE 10 OR FEWER PERSONS				
Number of returns	No.	216	170 (f)	188
Total employment, including working proprietors	"	1,365	1,087 (f)	1,183

(a) For the year 1948 gross output excludes payments for transport services outwards on finished goods sold. For subsequent years gross output includes payments to other firms and undertakings and to firms' own separate transport organisations for transport services.

(b) Payments to other firms and undertakings and to firms' own separate transport organisations. For the year 1948 payments cover only transport outwards of finished goods sold. For subsequent years they cover payments for transport of both finished goods sold and materials and fuel purchased.

(c) Number in week ended September 25, 1948.

(d) Excluding outworkers and including working proprietors.

(e) Excluding expenditure for establishments not yet in production.

(f) Excluding Northern Ireland. No information about small firms was collected in Northern Ireland for 1951.

Analysis by size, 1954

Larger establishments in the United Kingdom

TABLE 3

Average number employed (a)	Establishments	Gross output	Net output	Employees		Wages and salaries		Capital expenditure (b)	Net output per person employed (a)
				Operatives	Others	Operatives	Others		
	Number	£'000	£'000	Number	Number	£'000	£'000	£'000	£
11 - 24(c)	164	3,502	2,265	1,508	1,299	608	628	143	794
25 - 49	166	9,143	5,216	3,012	2,744	1,305	1,430	266	901
50 - 99	98	9,189	6,040	3,775	2,736	1,773	1,491	394	927
100 - 199	85	18,904	11,768	6,015	5,518	2,803	3,057	717	1,020
200 - 299	34	19,188	10,575	4,885	3,599	2,425	2,169	440	1,246
300 - 399	16	10,668	6,358	2,770	2,470	1,444	1,463	245	1,213
400 - 499	13	9,998	6,072	3,700	2,055	1,976	1,224	604	1,055
500 - 749	15	17,596	9,359	6,242	3,241	3,562	2,131	354	987
750 - 999	10	18,827	10,187	5,885	2,924	3,739	2,030	417	1,156
1,000 - 1,499	11	35,705	16,490	6,899	6,593	4,347	4,625	1,354	1,222
1,500 - 1,999	7	25,584	13,763	8,636	3,969	6,059	3,476	880	1,092
2,000 and over	5	38,902	18,790	12,840	5,861	7,965	4,685	626	1,005
Total	624	217,207	116,882	66,167	43,009	38,005	28,409	6,438	1,070

(a) Excluding outworkers and including working proprietors.

(b) Capital expenditure on new building work and on acquisition of plant, machinery and vehicles, excluding expenditure for establishments not yet in production.

(c) Including a small number of establishments with fewer than 11 persons employed, particulars of which were included with those for larger establishments on a single return.

Analysis according to specialisation within the industry, 1954

Larger establishments in the United Kingdom

TABLE 4

	Unit	Specialist producers of		Remainder of the industry	Total
		Newspapers	Magazines and periodicals		
Number of establishments	No.	462	133	29	624
Total value of sales and work done	£'000	126,351	84,749	6,045	217,146
Sales of characteristic products	"	119,517	67,557		
Products on hand for sale	"	318	2,494	397	3,208
and work in progress	"	15	91	15	61
Gross output (production)	"	126,337	84,840	6,030	217,207
Purchases of materials and fuel	"	40,863	25,082	1,337	67,282
Stocks of materials and fuel	"	6,162	3,412	372	9,946
Cost of materials and fuel used	"	1,023	457	11	577
Payment for work done on materials given out including also authors' royalties, copyright payments, payments to contributors and press agencies, and editorial, artists' and readers' fees less payments received from authors	"	41,887	24,625	1,348	67,859
Payment for transport	"	6,858	18,763	271	25,892
Net output	"	4,655	1,869	50	6,574
Average number of employees	No.	72,937	39,583	4,362	116,882
Total employment (a)	"	43,069	18,858	4,240	66,167
Net output per person employed (a)	"	29,798	12,077	1,134	43,009
Wages and salaries	£'000	72,954	30,941	5,374	109,269
Capital expenditure	"	1,000	1,279	812	1,070
New building work (b)	"	24,242	11,498	2,265	38,005
Plant and machinery	"	18,861	8,870	678	28,409
Vehicles	"	522	457	54	1,034
	"	3,160	1,136	184	4,480
	"	311	33	9	353
	"	653	247	26	925
	"	127	66	7	201

(a) Excluding outworkers and including working proprietors.

(b) Excluding expenditure at establishments not yet in production.

Sales of the principal products of the industry, including sales of these products by establishments classified to other industries

Larger establishments in the United Kingdom

TABLE 5

	1951		1954		
	Quantity	Value	Quantity	Value	Entries
	Mn.	£'000	Mn.	£'000	Number
Newspapers, daily					
Printed and published (a)					
Quantity and selling value	9,307	39,883	9,189	44,644	112
Advertisement revenue		29,853		45,945	111
Printed for other United Kingdom commercial publishers (b)	..	578	..	619	10
Newspapers, other than daily					
Printed and published (a)					
Quantity and selling value	2,474	16,188	2,514	17,835	467
Advertisement revenue		12,919		19,718	450
Printed for other United Kingdom commercial publishers (b)	..	2,124	..	2,833	84
Magazines, reviews, trade journals and similar periodicals					
Printed and published (a)					
Quantity and selling value	2,419	25,190	2,622	29,711	501
Advertisement revenue		18,873		29,065	183
Printed for other United Kingdom commercial publishers (b)	..	14,149	..	21,840	430
Photographs					
Printed and published					
Selling value	..	258(c)	..	210(d)	138
Advertisement revenue		4		-	-
Printed for other United Kingdom commercial publishers (b)	..	30	..	9	6
Royalties and payments for reproduction rights	..	257	..	442	83
Total published matter					
Printed and published (a)					
Selling value		81,519		92,401	..
Advertisement revenue and royalties and payments for reproduction rights, etc.		61,906		95,170	..
Printed for other United Kingdom commercial publishers (b)		16,881		25,301	..
Waste products sold					
Paper and board	..	2,965	..	1,882	903
Other kinds	..	184	..	186	171
Total		163,454		214,940	..
Sales in other industries (see Table 6)		13,271		12,623	..
Principal products of this industry sold by establishments in the industry		150,183		202,317	579

(a) Including sales and advertisement revenue of publishers who do not do their own printing and also the printing of published matter for overseas customers and for non-commercial United Kingdom publishers (manufacturers, learned societies, etc.) who are not covered by the Census for this industry.

(b) Amount charged.

(c) Described as 'Other published matter'.

(d) So far as recorded separately.

NEWSPAPER AND PERIODICAL PRINTING AND PUBLISHING
Sales of principal products of the industry by establishments
classified to other industries
Larger establishments in the United Kingdom

TABLE 6

	1954			Principal industries in which produced (a)
	Quantity	Value	Entries	
	Mn.	£'000	Number	
Newspapers				
Printed and published (b)				10K
Quantity and selling value	36	275	58	
Advertisement revenue		601	44	
Printed for other United Kingdom commercial publishers (c)				
Daily	..	69	..	
Other than daily	..	1,391	39	
Magazines, reviews, trade journals and similar periodicals				
Printed and published (b)				3G, 10I, 10K
Quantity and selling value	211	3,061	330	
Advertisement revenue		617	75	10K
Printed for other United Kingdom commercial publishers (c)	..	5,398	343	10H, 10K
Total published matter				
Printed and published (b)				3G, 10I, 10K
Selling value		3,336	..	
Advertisement revenue		1,218	..	10K
Printed for other United Kingdom commercial publishers (c)		6,859	..	10H, 10K
Waste products sold				
Paper and board	..	1,210	563	10H, 10I
Total		12,623	..	

(a) The volume number and industry references given are to the industries shown in the list at the back of this report.

(b) Including sales and advertisement revenue of publishers who do not do their own printing and also the printing of published matter for overseas customers and for non-commercial United Kingdom publishers (manufacturers, learned societies, etc.) who are not covered by the Census for this industry.

(c) Amount charged.

Sales in the industry of other than principal products
Larger establishments in the United Kingdom

TABLE 7

	1954
	Value
	£'000
Printed books (a)	6,909
Diaries (a)	68
Christmas cards, greeting cards and calendars	142
Other published matter (a)	725
Stereotyping, electrotyping and typesetting	78
Lithographic printing	21
Engraving of blocks, plates, etc.	708
Binding (including re-binding) machine ruling, relief stamping and other work	141
Manuscript books and manufactured stationery	75
Other goods	144
Work done (b)	
General and job printing	5,816
Total	14,829

(a) Including advertisement revenue amounting to a total of £345,000.

(b) Amount charged.

TABLE 8 - Total make of intermediate products
Larger establishments in the United Kingdom
This table is not applicable to the industry.

Purchases of materials and fuel, 1954
Larger establishments in the United Kingdom

TABLE 9

	Quantity	Cost
	Th.cwt.	£'000
Materials		
Newsprint	15,601.4	41,203
Paper for printing	4,151.0	15,417
Other paper (except packing materials)	17.8	99
	..	65
Strawboard, cardboard, millboard or fibreboard (except packing materials)	29.4	66
	..	13
Printers' ink	332.1	2,170
Type moulds (plastic or papier-mâché) and duplicate plates	..	95
Purchased process blocks	..	800
Type and type metal purchased	..	408
Copper and zinc sheets and plates	6.2	107
	..	26
Photographic materials	..	362
	Th.sq.yds.	
Bookbinders' cloth (including leather cloth)	713.1	78
Loose printed sheets or bound books imported for publication	..	5
Packing materials	Th.cwt.	
Paper	35.5	94
	..	82
Other	17.7	148
	..	147
Replacement parts for machinery, plant and vehicles and consumable tools bought as replacements	..	1,234
All other purchased materials	..	2,452
Fuel and electricity	Th.tons	
Coal	16.9	78
Coke	12.3	69
Liquid fuels (including creosote/pitch mixtures)		
For use in internal combustion engines	Th.gal.	
Motor spirit (petrol) for use in road vehicles and derv. fuel	2,922.8	574
Other	94.2	9
For burning in furnaces, boilers, kilns, etc.	2,336.8	108
Gas purchased	Th.therms	
From Gas Boards	7,062.8	414
From other sources, including other departments of the same firms	-	-
Electricity purchased (a)	Th.kWh.	
From Electricity Boards	148,284	951
From other sources, including other departments of the same firms	168	2
	..	2
All other purchased fuel		5
Total cost		67,282

(a) Owing to the risk of disclosure of details relating to an individual undertaking particulars of electricity generated at firms' own establishments cannot be published.

Average number of employees, and wages, salaries
and superannuation payments

Larger establishments in the United Kingdom

TABLE 10

	1951	1954
	Number	Number
Average number of employees		
Operatives	59,296	66,167
Administrative, technical and clerical employees	38,198	43,009
Total	97,494	109,176
	£'000	£'000
Wages and salaries paid to		
Operatives	26,523	38,005
Administrative, technical and clerical employees	21,764	28,409
Total	48,287	66,414
	£	£
Wages and salaries per head		
Operatives	447	574
Administrative, technical and clerical employees	570	661
		£'000
Superannuation and other pension funds for employees and dependents (a)		
Employers' contributions	..	2,322
		Number
Employees covered	..	59,399
		£'000
Pension, etc. payments to former employees and dependents (a)	..	861

(a) The figures given relate to larger establishments in Great Britain only.

Employment in a specified week (a)

Larger establishments in the United Kingdom

TABLE 11

	Number					
	1951			1954		
	Males	Females	Total	Males	Females	Total
Working proprietors	69	16	85	70	23	93
Operatives	55,166	4,672	59,838	61,084	5,452	66,536
Administrative, technical and clerical employees	27,333	11,148	38,481	30,318	13,644	43,962
Total employees	82,499	15,820	98,319	91,402	19,096	110,498

(a) Week ended September 22, 1951, or October 30, 1954.

LIST OF INDUSTRY REPORTS

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A. Coal Mines	H. Printing and Bookbinding Machinery	E. Preserved Meat
B. Non-Metalliferous Mines and Quarries (other than Coal, Salt and Slate)	I. Mechanical Engineering (General)	F. Milk Products
C. Salt Mines, Brine Pits and Salt Works	J. Mechanical Engineering (Repairing)	G. Ice Cream
D. Slate Quarries and Mines	K. Electrical Engineering (General)	H. Sugar and Glucose
E. Metalliferous Mines and Quarries	L. Electric Wires and Cables	I. Cocoa, Chocolate and Sugar Confectionery
F. Brick and Fireclay	M. Radio and Telecommunications	J. Preserved Fruit and Vegetables
G. China and Earthenware	N. Batteries and Accumulators	
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I. Glass (other than Containers)		A. Margarine
J. Cement	VOLUME 5	B. Fish Curing
K. Abrasives	A. Tool and Implement	C. Cattle, Dog and Poultry Foods
L. Building Materials	B. Cutlery	D. Vinegar and Other Condiments
M. Manufactured Fuel	C. Chain, Nail, Screw and Miscellaneous Forgings	E. Starch
	D. Wire and Wire Manufactures	F. Ice
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A. Coke Ovens and By-products	F. Brass Manufactures	H. Brewing and Malting
B. Dyes and Dyestuffs	G. Needles, Pins, Fish Hooks and Metal Smallwares	I. Wholesale Bottling
C. Fertiliser, Disinfectant, Insecti- cide and Allied Industries	H. Scientific, Surgical and Photographic Instruments, etc.	J. Spirit Distilling
D. Coal Tar Products	I. Watch and Clock	K. Spirit Rectifying and Compounding
E. Chemicals (General)	J. Jewellery and Plate	L. Soft Drinks, British Wines and Cider
F. Drugs and Pharmaceutical Preparations	K. Precious Metals Refining	M. Tobacco
G. Toilet Preparations and Perfumery	L. Musical Instruments	
H. Explosives and Fireworks		VOLUME 10
I. Paint and Varnish	VOLUME 6	A. Timber
J. Soap, Candles and Glycerine	A. Cotton Spinning and Doubling	B. Furniture and Upholstery
K. Polishes	B. Cotton Weaving	C. Soft Furnishings
L. Ink	C. Woollen and Worsted	D. Shop and Office Fitting
M. Match	D. Rayon, Nylon, etc. Production	E. Wooden Containers and Baskets
N. Mineral Oil Refining	E. Rayon, Nylon, etc. Weaving, and Silk	F. Paper and Board
O. Oils and Greases	F. Flax Processing	G. Wallpaper
P. Seed Crushing and Oil Refining	G. Linen and Soft Hemp	H. Cardboard Box, Carton and Fibre-board Packing Case
Q. Glue, Gum, Paste and Allied Industries	H. Jute	I. Manufactured Stationery, Paper Bag and Kindred Industries
R. Plastics Materials	I. Rope, Twine and Net	J. Newspaper and Periodical Printing and Publishing
	J. Hosiery and Other Knitted Goods	K. Printing and Publishing, Bookbinding, Engraving, etc.
VOLUME 3	K. Lace	
A. Blast Furnaces	L. Carpets	VOLUME 11
B. Iron and Steel (Melting and Rolling)	M. Narrow Fabrics	A. Rubber
C. Iron Foundries	N. Canvas Goods and Sacks	B. Linoleum, Leathercloth and Allied Industries
D. Steel Sheets	O. Textile Converting	C. Brushes and Brooms
E. Tinplate	P. Made-up Household Textiles	D. Toys and Games
F. Wrought Iron and Steel Tubes	Q. Textile Finishing	E. Sports Requisites
G. Non-Ferrous Metals (Smelting, Rolling, etc.)	R. Textile Packing	F. Miscellaneous Stationers' Goods
H. Scrap Metal Processing		G. Cinematograph Film Production
I. Motor Vehicles and Cycles (Manufacturing)	VOLUME 7	H. Cinematograph Film Printing
J. Motor Vehicles and Cycles (Repairing)	A. Asbestos	I. Plastic Goods and Fancy Articles
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