Readership Survey
2013
- Final Report -
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The intention of the survey was to collect valid data from the whole spectrum of readers of the TIPA-magazines.

A basic questionnaire was used for the purpose of comparability and to incorporate the results.

For 20 magazines an online-survey with identical questionnaire was published on http://presseforschung.de.
1. Skeleton Data - Synopsis

Coordinated readership survey with self-administered questionnaires. Parallel online-survey for 20 magazines.

Duration: October 29\textsuperscript{nd} 2012 – February 08\textsuperscript{th} 2013

Participants: 23 magazines from 14 countries

Total returns \( N = 8\,564 \)
Analysed returns: \( N_a = 7\,904 \)

Returns by mail: 26.8 %
Returns by fax: 5.5 %
Returns online: 67.7 %

Implementation of the survey - concept, recording, analysis:
WIP Wissenschaftliches Institut für Presseforschung und Medienberatung, Cologne
1. Skeleton Data - Method I

Returns

The returns for each magazine were recorded separately.

There was a large degree of fluctuation, with the smallest feedback consisting of 101 questionnaires and the largest consisting of 1014. The analysed returns ranged from 100 to 851.

On average, each magazine achieved a return rate of 344 questionnaires.
Presentation of the Results

The initial focus was always on the overall results which flowed into the results for all magazines. Where appropriate, WIP also differentiated between the magazines by region:

- **Central Europe**
  Great Britain, France, Netherlands, Germany, Poland

- **Southern Europe**
  Spain, Italy, Greece, Hungary

- **Northern America**
  USA, Canada

- **Other Countries**
  South Africa, Australia, China
1. Skeleton Data - The Magazines
1. Skeleton Data - Magazines by Regions

Central Europe
- 5 Countries
- 10 Magazines

Southern Europe
- 4 Countries
- 8 Magazines
1. Skeleton Data - Magazines by Regions

Northern America

2 Countries
2 Magazines

CANADA

USA
1. Skeleton Data - Magazines by Regions

Other Countries
3 Countries
3 Magazines

South Afrika
Australia
China
2. Personal Information - Overall Results

Initial comment: In the surveys the readers often left questions unanswered. The results with the personal information are presented without these missing data and extrapolated to 100%.

• The readers of the TIPA-magazines are predominantly male. Only nearly every fifth reader is female.

• The average reader is 46.1 years old. On average, the women are clearly younger than the men (40 to 47 years). 59 percent of the readers are younger than 50 years of age.

• 48 percent of readers reported a net monthly household income of 2 500 Euros or more. 27 Percent of households have an income of under 1 500 Euros.
2. Personal Information - Sex

Overall

Female 19.2 %  Male 80.8 %
## 2. Personal Information – Readership by Gender in Each Region

### Central Europe
- **Male**: 83.4 percent
- **Female**: 16.6 percent

### Southern Europe
- **Male**: 77.1 percent
- **Female**: 22.9 percent

### Northern America
- **Male**: 82.5 percent
- **Female**: 17.5 percent

### Other Countries
- **Male**: 81.0 percent
- **Female**: 19.0 percent
2. Personal Information - Average Age

Average Age Overall

Total 46.1 years
Male 47.5 years
Female 39.7 years
## Average Age by Region

### Central Europe
- **Total**: 46.8 years
- **Male**: 48.0 years
- **Female**: 39.5 years

### Southern Europe
- **Total**: 41.8 years
- **Male**: 43.5 years
- **Female**: 36.1 years

### Northern America
- **Total**: 57.2 years
- **Male**: 58.9 years
- **Female**: 50.7 years

### Other Countries
- **Total**: 47.8 years
- **Male**: 49.0 years
- **Female**: 42.8 years
2. Personal Information - Age Distribution

59 percent of the readers are younger than 50 years of age.
2. Personal Information - Age Distribution by Region

- **Central Europe**
  - Under 29: 13.2%
  - 30 - 39: 17.5%
  - 40 - 49: 25.1%
  - 50 - 59: 25.5%
  - 60 - 69: 16.2%
  - 70 +: 2.5%

- **Southern Europe**
  - Under 29: 19.5%
  - 30 - 39: 28.5%
  - 40 - 49: 26.8%
  - 50 - 59: 15.3%
  - 60 - 69: 7.4%
  - 70 +: 2.6%

- **Northern America**
  - Under 29: 3.9%
  - 30 - 39: 8.2%
  - 40 - 49: 12.9%
  - 50 - 59: 25.2%
  - 60 - 69: 32.9%
  - 70 +: 17.0%

- **Other Countries**
  - Under 29: 11.2%
  - 30 - 39: 18.4%
  - 40 - 49: 22.7%
  - 50 - 59: 27.1%
  - 60 - 69: 13.9%
  - 70 +: 6.8%
## 2. Personal Information - Status

### Overall

<table>
<thead>
<tr>
<th>Status</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>single</td>
<td>22.7 percent</td>
</tr>
<tr>
<td>live with a partner</td>
<td>68.4 percent</td>
</tr>
<tr>
<td>have under-age children</td>
<td>23.9 percent</td>
</tr>
<tr>
<td>retired</td>
<td>14.1 percent</td>
</tr>
</tbody>
</table>
## 2. Personal Information - Status by Region

<table>
<thead>
<tr>
<th>Region</th>
<th>Single</th>
<th>Live with a Partner</th>
<th>Have Under-Age Children</th>
<th>Retired</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Central Europe</strong></td>
<td>21.5 %</td>
<td>72.2 %</td>
<td>24.0 %</td>
<td>13.2 %</td>
</tr>
<tr>
<td><strong>Southern Europe</strong></td>
<td>25.6 %</td>
<td>63.0 %</td>
<td>27.1 %</td>
<td>9.6 %</td>
</tr>
<tr>
<td><strong>Northern America</strong></td>
<td>17.0 %</td>
<td>70.0 %</td>
<td>12.5 %</td>
<td>33.5 %</td>
</tr>
<tr>
<td><strong>Other Countries</strong></td>
<td>17.0 %</td>
<td>70.0 %</td>
<td>12.5 %</td>
<td>33.5 %</td>
</tr>
</tbody>
</table>
Nearly two out of three readers live in a city.
2. Personal Information – city, town?

- **Central Europe**
  - Metropolis/large city: 34.3%
  - Mid-sized city: 26.3%
  - Village/small town: 12.3%
  - The countryside: 27.1%

- **Southern Europe**
  - Metropolis/large city: 39.9%
  - Mid-sized city: 33.8%
  - Village/small town: 24.1%
  - The countryside: 2.1%

- **Northern America**
  - Metropolis/large city: 33.5%
  - Mid-sized city: 21.3%
  - Village/small town: 44.8%
  - The countryside: 12.2%

- **Other Countries**
  - Metropolis/large city: 37.4%
  - Mid-sized city: 13.1%
  - Village/small town: 4.7%
  - The countryside: 2.1%
2. Personal Information – “I travel at least...”

- Monthly
  - Business at least: 15.1%
  - Leisure at least: 13.6%
- Quarterly
  - Business at least: 16.0%
  - Leisure at least: 30.2%
2. Personal Information – Income Consumers

Net monthly household income 2013 in Euros

- 48% of the households have an income above 2500 Euros
- (n/a: 8.1%)
2. Personal Information - Income Consumers by Regions

Central Europe
(n/a: 5.1%)

Southern Europe
(n/a: 11.9%)
2. Personal Information - Income Consumers by Regions II

Northern America
(n/a: 11%)

Other Countries
(n/a: 3.7%)

3. Photography Practice: Overall Results

• 61 per cent of the respondents in the survey take photos privately.

• 64 per cent of the readers generate their pictures often in a RAW file format.

• The average reader takes 879 photographs a month. Around 49 photographs he prints out himself. Monthly he orders around 54 prints from a shop.

• Every second reader creates printed photobooks. Each of these readers in average creates per year 5.3 printed photobooks.

• 30 per cent of the readers often use their personal website to present photographs. Likewise 29 per cent often use facebook.

• 60 per cent of the readers often use the camera function M-mode, every second reader uses the Av-mode function of his camera.

• Readers of TIPA-magazines are multiplier. 54 per cent regularly advice others on the purchase of photographic equipment.
3. Photography Practice: “I take photos...”

The majority of readers take photos privately.

- Privately: 61%
- Semi-professionally: 21%
- Professional user: 14%
- Professional photographer: 4%
3. Photography Practice: “I take photos...”

- **Central Europe**
  - Privately: 52%
  - Semi-professionally: 26%
  - Professionally: 9%
  - Professional User: 5%
  - Other Countries: 3%

- **Southern Europe**
  - Privately: 69%
  - Semi-professionally: 4%
  - Professionally: 13%
  - Professional User: 4%

- **Northern America**
  - Privately: 58%
  - Semi-professionally: 30%
  - Professionally: 9%
  - Professional User: 3%

- **Other Countries**
  - Privately: 68%
  - Semi-professionally: 20%
  - Professionally: 10%
  - Professional User: 2%
3. Photography Practice:
“My photos are generated in ...”

Note: More than one answer was possible
3. Photography Practice: “My photos are generated …”

Note: More than one answer was possible
### 3. Photography Practice: photos/prints

<table>
<thead>
<tr>
<th>Question</th>
<th>Mean</th>
<th>Median</th>
</tr>
</thead>
<tbody>
<tr>
<td>“I take ... photos per month”</td>
<td>879</td>
<td>339</td>
</tr>
<tr>
<td>“I print out myself”</td>
<td>49</td>
<td></td>
</tr>
<tr>
<td>...% of prints larger than half magazine page</td>
<td>37,5%</td>
<td></td>
</tr>
<tr>
<td>“I order as pictures from a laboratory”</td>
<td>54</td>
<td></td>
</tr>
<tr>
<td>...% of prints larger than half magazine page</td>
<td>39,5%</td>
<td></td>
</tr>
</tbody>
</table>

For this purpose on average the readers use 2.0 cameras.

There is a wide range of answers, beginning with 10 photographs up to 15 000.
3. Photography Practice:
“Per year I create ... printed photo-books”

Mean / Base: persons who create one or more photo-books
3. Photography Practice:
“To present my photographs, I use…”

Note: More than one answer was possible
3. Photography Practice:
“TIPA Survey 2013”

Note: More than one answer was possible
3. Photography Practice: „The following applies to me“ (I)

**Statements:**

“I frequently participate in photographic competitions”

“I keep my photographic equipment in line with state-of-the-art technology”

“I spend at least as much on photographic accessories as for my camera(s)”

“I regularly advice others on the purchase of photographic equipment”
3. Photography Practice: “The following applies to me” (II)

Readers as multipliers

- Regularly advise others on the...: 54.1% often, 30.8% occasionally
- Keep equipment in line...: 49.0% often, 13.4% occasionally
- Spend as much on accessories as...: 45.5% often, 14.7% occasionally
- Participate in competitions: 24.1% often, 9.4% occasionally
4. Reading Behaviour - Overall Results

- 42.3 per cent of the respondents in the survey were subscribers, 41.4 per cent were single copy buyers.

- The readers pick up their photo magazine an average of 6.2 times and read it for a total of 84 minutes. *(Due to the difference in periodic variation, no distinctions were made by region.)*

- Overall, all TIPA titles show an average probability of 84.3 per cent page exposure. This means that advertising customers can be fairly certain that their own advertisements will not be skipped over.

- The majority of readers take every issue. Referred to all titles, every single issue on a statistical average reaches almost 60.3 per cent of the readers from the maximum readership.

- On average, every copy of a magazine is read by 2.4 people.
4. Reading Behaviour: Magazine Purchases

- Subscription: 41.6%
- Single copy sales: 12.2%
- Free copy: 3.6%
- Another way: 42.6%
4. Reading Behaviour:

“Of any one issue I normally read...”

Probability of page exposure: 84.3 %  (70 % - 94 %)
4. Reading Behaviour:

<table>
<thead>
<tr>
<th>Reading Behaviour</th>
<th>Minimum Mean</th>
<th>Maximum Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reading time: 84.0 minutes</td>
<td>43 min.</td>
<td>127 min.</td>
</tr>
<tr>
<td>Frequency of utilisation per copy: 6.2</td>
<td>3.0</td>
<td>8.3</td>
</tr>
<tr>
<td>Readers per copy: 2.4</td>
<td>1.6</td>
<td>5.7</td>
</tr>
<tr>
<td>Readers of any issue: 60.3 %</td>
<td>First time reader: 8.8%</td>
<td></td>
</tr>
</tbody>
</table>
5. Attitudes to the Magazines: Overall Results

• Overall, the TIPA readers have a positive opinion of their photo magazine. Every second respondent agrees with all provided statements.

• 94 per cent of the readers classify their magazine as an “important magazine”, another 94 per cent as “reliable and competent”.

• Seen objectively, photo magazines are the most important sources of information for the readers. Fully 94 per cent of respondents say they regularly obtain information from this source.

• 55.5 per cent of respondents say they rely on photo magazines the most. A further 10 per cent did not give any details on the source they trust the most.
## 5. Attitudes to the Magazines: ratings

### I rate the magazine as follows:
(completely true / true)

<table>
<thead>
<tr>
<th></th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>reliable and competent</td>
<td>93.9 %</td>
</tr>
<tr>
<td>important magazine</td>
<td>93.6 %</td>
</tr>
<tr>
<td>inspiring magazine</td>
<td>85.1 %</td>
</tr>
<tr>
<td>tips for buying cameras</td>
<td>84.1 %</td>
</tr>
<tr>
<td>high level of practical use</td>
<td>83.9 %</td>
</tr>
<tr>
<td>I would miss it</td>
<td>82.1 %</td>
</tr>
<tr>
<td>makes market transparent</td>
<td>69.7 %</td>
</tr>
<tr>
<td>tips for selecting accessories</td>
<td>47.7 %</td>
</tr>
</tbody>
</table>
5. Attitudes to the Magazines: information sources

- After photo magazines, the internet is the second most important source of information, being used by 89.8 per cent of readers.

- The readers’ specialist retailer and trade fairs follow.

- Only every fifth reader uses multi-topic magazines or computer magazines to obtain information about photographic equipment.
5. Attitudes to the Magazines: Information sources by region

“I regularly obtain information…”

<table>
<thead>
<tr>
<th>Information Source</th>
<th>Total</th>
<th>Europe</th>
<th>Central</th>
<th>Southern</th>
</tr>
</thead>
<tbody>
<tr>
<td>photo magazines</td>
<td>94.0</td>
<td>96.0</td>
<td>89.5</td>
<td></td>
</tr>
<tr>
<td>internet</td>
<td>89.8</td>
<td>93.0</td>
<td>87.1</td>
<td></td>
</tr>
<tr>
<td>my specialist retailer</td>
<td>25.5</td>
<td>25.5</td>
<td>22.9</td>
<td></td>
</tr>
<tr>
<td>trade fairs</td>
<td>24.8</td>
<td>27.6</td>
<td>21.9</td>
<td></td>
</tr>
<tr>
<td>multi-topic magazines</td>
<td>22.8</td>
<td>17.9</td>
<td>27.4</td>
<td></td>
</tr>
<tr>
<td>company brochures</td>
<td>22.6</td>
<td>23.6</td>
<td>21.9</td>
<td></td>
</tr>
<tr>
<td>computer magazines</td>
<td>21.0</td>
<td>19.9</td>
<td>19.3</td>
<td></td>
</tr>
</tbody>
</table>
5. Attitudes to the Magazines: Information sources by region

“I regularly obtain information…”

<table>
<thead>
<tr>
<th>Information Sources</th>
<th>Total</th>
<th>Northern America</th>
<th>Other Countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>photo magazines</td>
<td>94.0</td>
<td>98.5</td>
<td>96.7</td>
</tr>
<tr>
<td>internet</td>
<td>89.8</td>
<td>90.0</td>
<td>86.3</td>
</tr>
<tr>
<td>my specialist retailer</td>
<td>25.5</td>
<td>35.0</td>
<td>26.1</td>
</tr>
<tr>
<td>trade fairs</td>
<td>24.8</td>
<td>20.0</td>
<td>26.0</td>
</tr>
<tr>
<td>multi-topic magazines</td>
<td>22.8</td>
<td>23.0</td>
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<tr>
<td>company brochures</td>
<td>22.6</td>
<td>24.5</td>
<td>19.9</td>
</tr>
<tr>
<td>computer magazines</td>
<td>21.0</td>
<td>27.0</td>
<td>25.3</td>
</tr>
</tbody>
</table>
5. Attitudes to the Magazines: “I trust most in ...”

- The readers rely mostly on the photo magazines. 55.5 per cent of respondents said they trust in this source of information the most.

- The internet, very important as a source of information, enjoys a high level of confidence for 22 per cent of readers. The dealers follow in third place with 6 per cent of responses.

- 10 per cent of readers did not give an unambiguous answer.

- The ratings of credibility for computer magazines or multi-topic magazines are very poor (<2 %).
5. Attitudes to the Magazines: “I trust most in ...”
5. Attitudes to the Magazines:

“I trust most in ...”

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Europe</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Central</td>
</tr>
<tr>
<td>photo magazines</td>
<td>55.5</td>
<td>58.7</td>
</tr>
<tr>
<td>internet</td>
<td>22.0</td>
<td>23.1</td>
</tr>
<tr>
<td>my specialist dealer</td>
<td>6.1</td>
<td>6.4</td>
</tr>
<tr>
<td>trade fairs</td>
<td>2.5</td>
<td>2.6</td>
</tr>
<tr>
<td>computer magazines</td>
<td>1.8</td>
<td>1.4</td>
</tr>
<tr>
<td>multi-topic magazines</td>
<td>1.6</td>
<td>1.2</td>
</tr>
<tr>
<td>company brochures</td>
<td>1.1</td>
<td>1.3</td>
</tr>
<tr>
<td>n/a</td>
<td>9.5</td>
<td>5.4</td>
</tr>
</tbody>
</table>
5. Attitudes to the Magazines:

“*I trust most in ...*”

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Northern America</th>
<th>Other Countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>photo magazines</td>
<td>55.5</td>
<td>60.0</td>
<td>54.1</td>
</tr>
<tr>
<td>internet</td>
<td>22.0</td>
<td>20.1</td>
<td>15.3</td>
</tr>
<tr>
<td>my specialist dealer</td>
<td>6.1</td>
<td>9.3</td>
<td>5.3</td>
</tr>
<tr>
<td>trade fairs</td>
<td>2.5</td>
<td>2.5</td>
<td>1.3</td>
</tr>
<tr>
<td>computer magazines</td>
<td>1.8</td>
<td>1.9</td>
<td>1.0</td>
</tr>
<tr>
<td>multi-topic magazines</td>
<td>1.6</td>
<td>1.0</td>
<td>1.0</td>
</tr>
<tr>
<td>company brochures</td>
<td>1.1</td>
<td>1.0</td>
<td>1.0</td>
</tr>
<tr>
<td>n/a</td>
<td>9.5</td>
<td>4.4</td>
<td>11.0</td>
</tr>
</tbody>
</table>
5. Attitudes to the Magazines: “An epaper version…”

- 52.3% applies fully
- 26.2% applies

- 26.1% is generally appealing for me
- 13.1% I would buy it instead of print
- 8.4% I would additionally subscribe to it...

* ... with special features at extra charge
5. Attitudes to the Magazines:
“An epaper version…” applies fully / applies

Central Europe

- Is generally appealing for me: 46.9%
- I would buy it instead of print: 22.0%
- I would additionally subscribe to it: 21.3%

Southern Europe

- Is generally appealing for me: 62.8%
- I would buy it instead of print: 23.9%
- I would additionally subscribe to it: 25.8%

Northern America

- Is generally appealing for me: 44.0%
- I would buy it instead of print: 15.8%
- I would additionally subscribe to it: 22.5%

Other Countries

- Is generally appealing for me: 55.3%
- I would buy it instead of print: 33.3%
- I would additionally subscribe to it: 26.3%
6. Attitudes to the Magazine websites: overall results

- 20 of 23 magazines put questions for their own websites. The following results refer to them.

- Four out of five readers have already visited the Website of their photo magazine or use it regularly.

- 50 per cent visit the Website of their magazine at least once a month.

- The Websites of the photo magazines are primarily used

  - to keep up-to-date in matters concerning photography
  - to look up test reports and photos of tested products
  - to find out about dates: events, exhibitions, competitions
6. Attitudes to the Magazine websites: reasons for use - all readers

“I visit the magazine-website...”

(several times a month / once a month, all readers):

to keep up-to-date in matters concerning photography 47.9 %
to look up test reports and photos of tested products 42.0 %
to find out about dates (events, exhibitions, etc.) 34.1 %
to use other services (glossary, archive, gallery etc.) 26.2 %
to read the classified ads [only sites with ads] 20.1 %
to exchange views in the forum [only sites with forum] 12.5 %
to buy something in the shop [only sites with shop] 9.2 %

Note: More than one answer was possible
7. Buying Behaviour and Attention to Advertisements: Overall Results

- **Interchangeable lenses** are in future the readers' top priority in purchasing intentions, followed by **accessories**. **Digital SLR cameras** follow in third place, **photo/graphics software** in fourth place.

- 79 per cent of the TIPA readers say that they always or often read advertisements.

- Nearly four out of five readers also find that advertisements have informational value.

- More than every second reader (55.2 %) was prompted by an advertisement into buying a photography-related article.
7. Buying Behaviour:
“I intend to buy...”

<table>
<thead>
<tr>
<th>Product Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interchangeable lenses</td>
<td>66.4 %</td>
</tr>
<tr>
<td>Accessories</td>
<td>59.1 %</td>
</tr>
<tr>
<td>Digital SLR photo camera</td>
<td>48.6 %</td>
</tr>
<tr>
<td>Photo/graphics software</td>
<td>32 %</td>
</tr>
<tr>
<td>Studio lighting</td>
<td>22.9 %</td>
</tr>
<tr>
<td>Tripod</td>
<td>20.6 %</td>
</tr>
<tr>
<td>Photo printer</td>
<td>15.9 %</td>
</tr>
<tr>
<td>Digital Compact-System camera</td>
<td>10.8 %</td>
</tr>
<tr>
<td>Digital compact camera</td>
<td>9.7 %</td>
</tr>
<tr>
<td>Scanner</td>
<td>8.2 %</td>
</tr>
<tr>
<td>Color Management System</td>
<td>8.1 %</td>
</tr>
<tr>
<td>Projector</td>
<td>4.9 %</td>
</tr>
<tr>
<td>Digital Medium Format System</td>
<td>4.3 %</td>
</tr>
</tbody>
</table>
7. Attention to Advertisements:

- 26 per cent of the TIPA readers say they “always” read advertisements, a further 53 per cent say they “often” do so.

- Nearly every second reader agrees (“applies”) with the statement that advertisements have informational value. A further 30 per cent confirm this with “applies fully”.

- 69 per cent of the TIPA-readers agree that advertisements in the magazines “have previously prompted me to gather further information”.

- Nevertheless, some 55 per cent were prompted by an advertisement into buying a photography-related article.
7. Attention to Advertisements:

„I read the advertisements... “

- Often: 52.7%
- Always: 26.0%
- Rarely: 18.4%
- Never: 1.3%
- n/a: 1.5%
7. Attention to Advertisements:

„Advertising in the magazine ... “

*Chart showing percentages of respondents who:
- have information value for me (49.1%)
- have previously prompted me to gather further information (43.3%)
- have previously prompted me to make a purchase (55.1%)*
7. Attention to Advertisements: by region (applies fully / applies)
Cologne, 11 April 2013

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