TIPA READERS SURVEY 2015
(C) TIPA, 2015
Readership Survey 2015
- Final Report -
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1. Skeleton Data - Preliminary Remark

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: November 7\textsuperscript{nd} 2014 – February 06\textsuperscript{th} 2015

Participants: 23 magazines from 14 countries

Total returns \( N = 7\,690 \)
Analysed returns: \( Na = 6\,813 \)

Returns by mail: 31.6 %
Returns by fax: 12.9 %
Returns online: 55.5 %

Implementation of the survey - concept, recording, analysis:
WIP Wissenschaftliches Institut für Presseforschung und Medienberatung, Cologne
Returns

The returns for each magazine were recorded separately with one exception: The two magazines of the English publisher Archant discontinued in the meantime and were pooled together.

On average, each magazine achieved a return rate of 350 questionnaires.
1. Skeleton Data - Method II

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**
  France, Netherlands, Great Britain, Germany

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

- **Northern America**
  Canada, USA

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

- **Central Europe**: 4 Countries, 11 Magazines
- **Southern Europe**: 4 Countries, 6 Magazines
1. Skeleton Data - Magazines by Regions

Northern America
2 Countries
2 Magazines

- USA
- CANADA
1. Skeleton Data - Magazines by Regions

Other Countries
4 Countries
4 Magazines

- India
- Brazil
- South Africa
- Australia
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 sixth reader is female.

- The average reader is 49.6 years old. On average, the women are clearly younger than the men (43 to 50.9 years). 45 percent of the readers are younger than 50 years of age.

- 68 percent of readers reported a net monthly household income which is more than the OECD-Mean of their country. 46 percent of readers reported more than 150 percent, 30 percent of readers reported more than 200 percent of the OECD-Mean.
2. Personal Information - Sex

Overall

Female 16.2 %
Male 83.8 %
2. Personal Information – Readership by Gender in Each Region

Central Europe
- Male: 85.1 percent
- Female: 14.9 percent

Southern Europe
- Male: 79.7 percent
- Female: 20.3 percent

Northern America
- Male: 84.2 percent
- Female: 15.8 percent

Other Countries
- Male: 86.9 percent
- Female: 13.1 percent
2. Personal Information - Average Age

Average Age Overall

Total: 49.6 years

Male: 50.9 years
Female: 43.0 years
2. Personal Information - Average Age by Region

### Central Europe
- **Total**: 52.2 years
  - Male: 53.3 years
  - Female: 45.9 years

### Southern Europe
- **Total**: 43.5 years
  - Male: 45.5 years
  - Female: 37.1 years

### Northern America
- **Total**: 60.0 years
  - Male: 60.8 years
  - Female: 54.4 years

### Other Countries
- **Total**: 46.9 years
  - Male: 48.1 years
  - Female: 39.0 years
2. Personal Information - Age Distribution

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

Central Europe:
- Under 29: 6.7%
- 30-39: 9.7%
- 40-49: 20.0%
- 50-59: 33.4%
- 60-69: 23.8%
- 70+ : 6.4%

Southern Europe:
- Under 29: 21.2%
- 30-39: 19.4%
- 40-49: 22.6%
- 50-59: 20.4%
- 60-69: 12.9%
- 70+ : 3.6%

Northern America:
- Under 29: 2.8%
- 30-39: 4.6%
- 40-49: 11.4%
- 50-59: 23.0%
- 60-69: 33.8%
- 70+ : 24.4%

Other Countries:
- Under 29: 15.6%
- 30-39: 18.4%
- 40-49: 21.2%
- 50-59: 19.9%
- 60-69: 17.2%
- 70+ : 7.7%
2. Personal Information – Income Consumers

Net monthly household income 2015 – according to OECD-Index 2014

30 % of the households have an income above 200 Percent higher than the average income in their country according to the OECD Better-Life-Index 2014 (n/a: 9.1 %)
2. Personal Information - Income Consumers by Regions I

Central Europe
(n/a: 8.5%)

Southern Europe
(n/a: 14.6%)
2. Personal Information - Income Consumers by Regions II

Northern America
(n/a: 13.2 %)

Other Countries
(n/a: 4.0 %)
3. Photography Practice: Overall Results

- 66 per cent of the readers take photos daily or several times a week.
- 43 per cent of the respondents answer: “Photography is my favourite activity”.
- 66 per cent of the readers generate their pictures often in a RAW file format.
- Every second reader (53 %) creates printed photobooks. Each of these readers in average creates 5.8 printed photobooks per year.
- 58 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. 62 per cent regularly advice others on the purchase of photographic equipment.
3. Photography Practice: “I take photos…”

The majority of readers take photos daily or several times a week.

- Daily: 18%
- Several times a week: 4%
- Once a week: 2%
- Several times a month: 10%
- Less often: 2%
- Rather seasonal: 23%

The majority of readers take photos daily or several times a week.
3. Photography Practice: “I take photos…”

- **Central Europe**
  - Daily: 23%
  - Several times a week: 47%
  - Once a week: 15%
  - Several times a month: 10%
  - Less often: 4%
  - Rather seasonal: 3%

- **Southern Europe**
  - Daily: 24%
  - Several times a week: 39%
  - Once a week: 18%
  - Several times a month: 9%
  - Less often: 6%
  - Rather seasonal: 4%

- **Northern America**
  - Daily: 23%
  - Several times a week: 46%
  - Once a week: 14%
  - Several times a month: 10%
  - Less often: 4%
  - Rather seasonal: 3%

- **Other Countries**
  - Daily: 25%
  - Several times a week: 39%
  - Once a week: 19%
  - Several times a month: 12%
  - Less often: 3%
  - Rather seasonal: 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:
“Per year I create ... printed photo-books”

Mean / Base: persons who create one or more photo-books
3. Photography Practice:
“I use the following camera functions”

Note: More than one answer was possible
### 3. Photography Practice:
„I characterise myself as follows“ (I)

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Statement</th>
</tr>
</thead>
<tbody>
<tr>
<td>42.8 %</td>
<td>“Photography is my favourite activity”</td>
</tr>
<tr>
<td>35.9 %</td>
<td>“I specialise in a few subjects” (nature, fashion…)</td>
</tr>
<tr>
<td>34.1 %</td>
<td>“I am an all-rounder without a main focus”</td>
</tr>
<tr>
<td>17.1 %</td>
<td>“I take pictures mainly of everyday life” (friends, family…)</td>
</tr>
</tbody>
</table>

Note: More than one answer was possible
3. Photography Practice: „I characterise myself as follows“ (II)

Statements:

18.2 %: “I am a trained photographer”

18.0 %: “Photography is my main profession”

9.4 %: “I take photos within my profession” (graphic design, media production…)

„I regularly use 2.1 different cameras (mean) to take pictures“

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

**Statements:**

- “I prefer to buy photographic products of a specific brand”
- “I advise others on the purchase of photographic equipment“
- “I never go out without my camera”
- “I keep my photographic equipment in line with state-of-the-art technology”
- “I spend at least as much money on photographic accessories as on my camera(s)”
3. Photography Practice: “The following applies to me” (II)

- Prefer to buy photographic products of a specific brand: 76.8%
  - Often: 36.9%
  - Occasionally: 39.9%
- Advise others on the purchase of photographic equipment: 62.4%
  - Often: 36.4%
  - Occasionally: 26.0%
- Never go out without my camera: 62.3%
  - Often: 37.6%
  - Occasionally: 24.7%
- Keep my photographic equipment in line...: 55.4%
  - Often: 39.5%
  - Occasionally: 15.9%
- Spend at least as much on accessories as on...: 48.0%
  - Often: 31.5%
  - Occasionally: 16.5%
3. Photography Practice: “In the next years...”

In the next 2 to 3 years:
I will spend time on photography...

- as much time as I do today: 40%
- rather more time: 59%
- rather less time: 1%

In future the majority of reader will spend more time on photography.
4. Reading Behaviour - Overall Results

• 48.7 per cent of the respondents in the survey were subscribers, 38.6 per cent were single copy buyers.

• The readers pick up their photo magazine an average of 5.7 times and read it for a total of 79 minutes. *(Due to the difference in periodic variation, no distinctions were made by region.)*

• Overall, all TIPA titles show an average probability of 85.2 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 64.9 per cent of the readers from the maximum readership.

• On average, every copy of a magazine is read by 2.3 people.
4. Reading Behaviour: Magazine Purchases

- Single copy sales: 39.3%
- Pass-on reader: 11.0%
- Subscription: 49.6%
4. Reading Behaviour:
“Of any one issue I normally read…”

Probability of page exposure: 85.2 % (75 % - 95 %)
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: 79 minutes</td>
<td>38 min.</td>
<td>114 min.</td>
</tr>
<tr>
<td>Frequency of utilisation per copy: 5.7</td>
<td>3.5</td>
<td>8.6</td>
</tr>
<tr>
<td>Readers per copy: 2.3</td>
<td>1.6</td>
<td>4.8</td>
</tr>
<tr>
<td>Readers of any issue: 64.9 %</td>
<td>First time reader: 8.2 %</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. Two out of three respondents agree with all provided statements.

- 88 per cent of the readers classify their magazine as “competent”, another 86 per cent as an “important magazine”.

- 84.5 per cent of respondents say they would miss their magazine “very strong” or “strong”, if the magazine were no longer published.

- Seen objectively, photo magazines are the most important sources of information for the readers. Fully 92 per cent of respondents say they regularly obtain information from this source.

- 50.3 per cent of respondents say they rely on photo magazines the most. A further 13.4 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:

- important
- inspiring
- competent
- high utility value
- clear
- independent
- current
- entertaining
- likable
- varied
- unimportant
- not inspiring
- incompetent
- low utility value
- confusing
- dependent
- not current
- boring
- dislikable
- unvaried
5. Attitudes to the Magazines: “would miss”

If the magazine were no longer published
I would miss it ...

- very strong: 36.3%
- strong: 48.9%
- less/not at all: 14.7%
5. Attitudes to the Magazines: information sources

• After photo magazines, the internet is the second most important source of information, being used by 86.8 per cent of readers.

• Trade fairs and the readers’ specialist retailer follow.

• Less than 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></th>
<th>Total</th>
<th>Europe</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Central</td>
<td>Southern</td>
<td></td>
</tr>
<tr>
<td>photo magazines</td>
<td>92.3</td>
<td>94.0</td>
<td>86.5</td>
<td></td>
</tr>
<tr>
<td>internet</td>
<td>86.8</td>
<td>87.8</td>
<td>85.3</td>
<td></td>
</tr>
<tr>
<td>trade fairs</td>
<td>27.0</td>
<td>29.5</td>
<td>22.3</td>
<td></td>
</tr>
<tr>
<td>my specialist retailer</td>
<td>23.5</td>
<td>25.8</td>
<td>17.5</td>
<td></td>
</tr>
<tr>
<td>company brochures</td>
<td>22.3</td>
<td>20.2</td>
<td>21.8</td>
<td></td>
</tr>
<tr>
<td>multi-topic magazines</td>
<td>17.7</td>
<td>14.4</td>
<td>19.6</td>
<td></td>
</tr>
<tr>
<td>computer magazines</td>
<td>17.4</td>
<td>17.0</td>
<td>17.2</td>
<td></td>
</tr>
</tbody>
</table>
### 5. Attitudes to the Magazines: Information sources by region

**“I regularly obtain information...”**

<table>
<thead>
<tr>
<th>Information Source</th>
<th>Total (in %)</th>
<th>Northern America</th>
<th>Other Countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>photo magazines</td>
<td>92.3</td>
<td>98.6</td>
<td>93.6</td>
</tr>
<tr>
<td>internet</td>
<td>86.8</td>
<td>88.4</td>
<td>86.0</td>
</tr>
<tr>
<td>trade fairs</td>
<td>27.0</td>
<td>15.9</td>
<td>33.6</td>
</tr>
<tr>
<td>my specialist retailer</td>
<td>23.5</td>
<td>30.5</td>
<td>23.3</td>
</tr>
<tr>
<td>company brochures</td>
<td>22.3</td>
<td>21.0</td>
<td>29.3</td>
</tr>
<tr>
<td>multi-topic magazines</td>
<td>17.7</td>
<td>17.6</td>
<td>23.5</td>
</tr>
<tr>
<td>computer magazines</td>
<td>17.4</td>
<td>19.5</td>
<td>17.8</td>
</tr>
</tbody>
</table>
5. Attitudes to the Magazines: “I trust most in …”

• The readers rely mostly on the photo magazines. 50.3 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 19.7 per cent of readers. The dealers follow in third place with 7.4 per cent of responses.

• 13.4 per cent of readers did not give an unambiguous answer.

• The ratings of credibility for computer magazines or multi-topic magazines are very poor (< 3 per cent).
5. Attitudes to the Magazines:
“I trust most in ...”

- Specialist retailer
- Trade fairs
- Multi-topic magazines
- Computer magazines
- Company brochures

- Photo magazines: 50.3%
- The internet: 19.7%
- n/a: 13.4%
- 1.6%
- 2.5%
- 1.1%
- 1.8%
5. Attitudes to the Magazines:

“I trust most in ...”
(in %)

<table>
<thead>
<tr>
<th>Source</th>
<th>Total</th>
<th>Europe</th>
<th>Central</th>
<th>Southern</th>
</tr>
</thead>
<tbody>
<tr>
<td>photo magazines</td>
<td>50.3</td>
<td>53.7</td>
<td>43.7</td>
<td></td>
</tr>
<tr>
<td>internet</td>
<td>19.7</td>
<td>19.2</td>
<td>21.0</td>
<td></td>
</tr>
<tr>
<td>my specialist dealer</td>
<td>7.4</td>
<td>9.5</td>
<td>5.7</td>
<td></td>
</tr>
<tr>
<td>trade fairs</td>
<td>2.6</td>
<td>3.1</td>
<td>2.8</td>
<td></td>
</tr>
<tr>
<td>multi-topic magazines</td>
<td>2.9</td>
<td>1.6</td>
<td>4.0</td>
<td></td>
</tr>
<tr>
<td>computer magazines</td>
<td>2.2</td>
<td>1.5</td>
<td>2.5</td>
<td></td>
</tr>
<tr>
<td>company brochures</td>
<td>1.5</td>
<td>1.1</td>
<td>1.3</td>
<td></td>
</tr>
<tr>
<td>n/a</td>
<td>13.4</td>
<td>10.4</td>
<td>19.0</td>
<td></td>
</tr>
</tbody>
</table>
5. Attitudes to the Magazines:

“I trust most in ...”
(in %)                             Total       Northern America Other Countries
photo magazines                   50.3        49.9            52.2
internet                         19.7        22.1            18.1
my specialist dealer             7.4         10.8             2.9
trade fairs                      2.6         1.3             2.1
multi-topic magazines            2.9         2.6             4.6
computer magazines               2.2         2.2             3.3
company brochures                1.5         1.5             2.8
n/a                              13.4        9.9             14.3
5. Attitudes to the Magazines:

About these topics I want to read (I):
5. Attitudes to the Magazines:

About these topics I want to read (II):

- Tests of accessoires
- Exhibitions
- Competitions
- Market overviews
6. Attitudes to the Digital Media: Use of the magazine-website

“I visit the website of the magazine …”

- never 22,8%
- several times a week 5,5%
- several times a month 18,7%
- once a month 17,2%
- less often 23,5%
- every 2-3 month 12,4%
6. Attitudes to the Digital Media: “An epaper version…”

- I already use it regularly*: 18.1% (10.2% fully, 7.9% applies)
- is generally appealing for me: 26.2% (14.2% fully, 12% applies)
- I would buy it instead of print: 17.3% (10.1% fully, 7.2% applies)
- I would additionally subscribe to it: 20.1% (14.2% fully, 5.9% applies)

* N = 18

... with special features at extra charge
6. Attitudes to the Digital Media: “An epaper version…” applies fully / applies

<table>
<thead>
<tr>
<th>Region</th>
<th>Already Use It Regularly (N=9)</th>
<th>Is Generally Appealing for Me</th>
<th>Would Buy It Instead of Print</th>
<th>Would Additionally Subscribe to It</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central Europe</td>
<td>15.7%</td>
<td>36.9%</td>
<td>13.9%</td>
<td>16.7%</td>
</tr>
<tr>
<td></td>
<td>8.1%</td>
<td>24.6%</td>
<td>8.4%</td>
<td>4.9%</td>
</tr>
<tr>
<td></td>
<td>7.6%</td>
<td>12.3%</td>
<td>5.5%</td>
<td>11.8%</td>
</tr>
</tbody>
</table>

*1 Mag: Subscription includes digital version

<table>
<thead>
<tr>
<th>Southern Europe</th>
<th>Already Use It Regularly (N=4)</th>
<th>Is Generally Appealing for Me</th>
<th>Would Buy It Instead of Print</th>
<th>Would Additionally Subscribe to It</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>15.4%</td>
<td>26.2%</td>
<td>15.4%</td>
<td>49.8%</td>
</tr>
<tr>
<td></td>
<td>10.8%</td>
<td>31.0%</td>
<td>10.8%</td>
<td>31.6%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Northern America</th>
<th>Already Use It Regularly</th>
<th>Is Generally Appealing for Me</th>
<th>Would Buy It Instead of Print</th>
<th>Would Additionally Subscribe to It</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>19.2%</td>
<td>28.5%</td>
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<td>11.0%</td>
</tr>
<tr>
<td></td>
<td>8.2%</td>
<td>8.9%</td>
<td>6.5%</td>
<td>28.5%</td>
</tr>
<tr>
<td></td>
<td>8.9%</td>
<td>6.5%</td>
<td>7.1%</td>
<td>13.6%</td>
</tr>
<tr>
<td></td>
<td>12.0%</td>
<td>7.1%</td>
<td>3.2%</td>
<td>13.6%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Countries</th>
<th>Already Use It Regularly (N=3)</th>
<th>Is Generally Appealing for Me</th>
<th>Would Buy It Instead of Print</th>
<th>Would Additionally Subscribe to It</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>8.9%</td>
<td>4.9%</td>
<td>15.8%</td>
<td>23.3%</td>
</tr>
<tr>
<td></td>
<td>13.8%</td>
<td>4.9%</td>
<td>15.8%</td>
<td>23.3%</td>
</tr>
<tr>
<td></td>
<td>27.5%</td>
<td>15.8%</td>
<td>26.4%</td>
<td>23.3%</td>
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<tr>
<td></td>
<td>15.6%</td>
<td>10.8%</td>
<td>15.6%</td>
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</tr>
<tr>
<td></td>
<td>26.4%</td>
<td>15.6%</td>
<td>15.6%</td>
<td>15.6%</td>
</tr>
</tbody>
</table>

TIPA Survey 2015
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.

• 78 per cent of the TIPA readers say that they always or often read advertisements.

• Three out of four readers also find that advertisements have informational value.

• More than every second reader (54.8 %) was prompted by an advertisement into buying a photography-related article.
7. Buying Behaviour:
“"I intend to buy..."”

- Interchangeable lenses 64.9 %
- Accessoires 54.2 %
- Digital SLR photo camera 44.6 %
- Photo/graphics software 31.4 %
- Studio lighting 21.4 %
- Tripod 20.0 %
- Photo printer 17.2 %
- Digital Compact-System camera 14.4 %
- Digital compact camera 9.1 %
- Color Management System 7.9 %
- Scanner 7.8 %
- Digital Medium Format System 5.2 %
- Projector 5.1 %
7. Attention to Advertisements:

- 28.9 per cent of the TIPA readers say they “always” read advertisements, a further 49.5 per cent say they “often” do so.

- Nearly every second reader agrees (“applies”) with the statement that advertisements have informational value. A further 27 per cent confirm this with “applies fully”.

- 70 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 and supplements in the magazine“

- always: 29.3%
- often: 50.1%
- rarely: 18.8%
- never: 1.8%
7. Attention to Advertisements:

„Advertisements in the magazine ...“
7. Attention to Advertisements: by region (applies fully / applies)

Central Europe

- Have informational value for me: 65.8%
- Have previously prompted me to gather further information: 44.4%
- Have previously prompted me to make a purchase: 34.4%

Southern Europe

- Have informational value for me: 78.7%
- Have previously prompted me to gather further information: 42.2%
- Have previously prompted me to make a purchase: 30.0%

Northern America

- Have informational value for me: 86.6%
- Have previously prompted me to gather further information: 49.8%
- Have previously prompted me to make a purchase: 47.8%

Other Countries

- Have informational value for me: 87.2%
- Have previously prompted me to gather further information: 42.7%
- Have previously prompted me to make a purchase: 38.9%
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