CONFIDENTIAL

TIPA READERS SURVEY 2009

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Readership Survey 2009

- 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. The TIPA magazines were directed at heterogeneous target groups, which is why the original draft was adapted to the target groups.

Two versions were created:

- for professional magazines and
- for consumer magazines

1. Skeleton Data - Synopsis

Coordinated readership survey with self-administered questionnaires
Duration: November 2nd 2008 – March 5th 2009

Participants: 17 magazines from 10 countries

Total returns N = 5.666
Analysed returns: Na = 4.108

Returns by mail: 70 %
Returns by fax: 30 %

One magazine published the questionnaire only as an online survey.

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

1. Skeleton Data - Method I

Returns / Formation of units

The returns for each magazine were recorded separately. There was a large degree of fluctuation, with the smallest return consisting of 30 questionnaires and the largest consisting of more than 1.200.

For the purposes of the analysis, the individual magazines were grouped in order to arrive at a sufficient yield. The overall results were calculated from average figures of the 15 units formed.

Reasons for the formation of the units were:

- a high degree of fluctuation in the returns
- some deviations in the questionnaires
- the heterogeneous character of the magazines
- different living conditions in the participating countries

Each unit achieved an average return rate of 270 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, both by target group and by European region.

Each target group distinguished between:

- magazines aimed chiefly at professionals.
  More than 40 % of the readers took photographs in their capacity as professional photographers or in the course of their work

- magazines aimed chiefly at consumers.
  More than 75 % took photographs privately or semi-professionally

The photo magazines were also grouped by European region:

Western Europe: the Netherlands (Holland), France, the United Kingdom
Central Europe: (1) Switzerland, Germany, Poland, Hungary; (2) Switzerland, Germany
Southern Europe: Spain, Italy, Greece

1. Skeleton Data - Magazines for Professionals

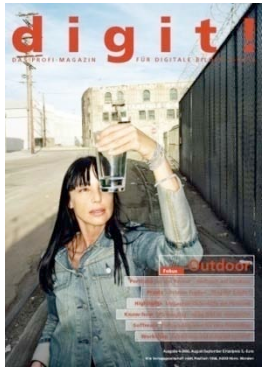
Magazines aimed chiefly at **professionals**

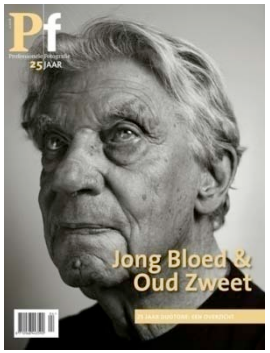
- “I take photographs as a professional photographer”
- “I take photographs as a professional user”

> 40 %

6 Magazines
6 Units
5 Countries

average of 281 questionnaires/unit





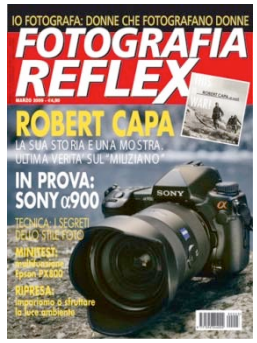
1. Skeleton Data - Magazines for Consumers

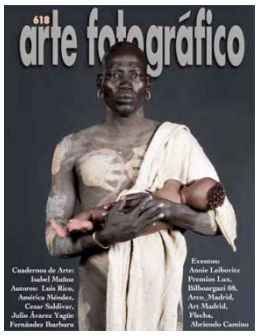
Magazines aimed chiefly at **consumers**

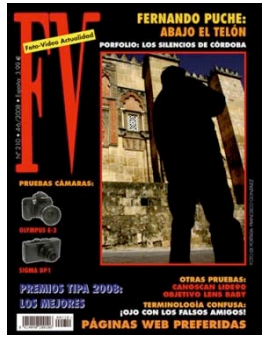
"I take photographs privately"
> 75 %

11 Magazines
9 Units
8 Countries

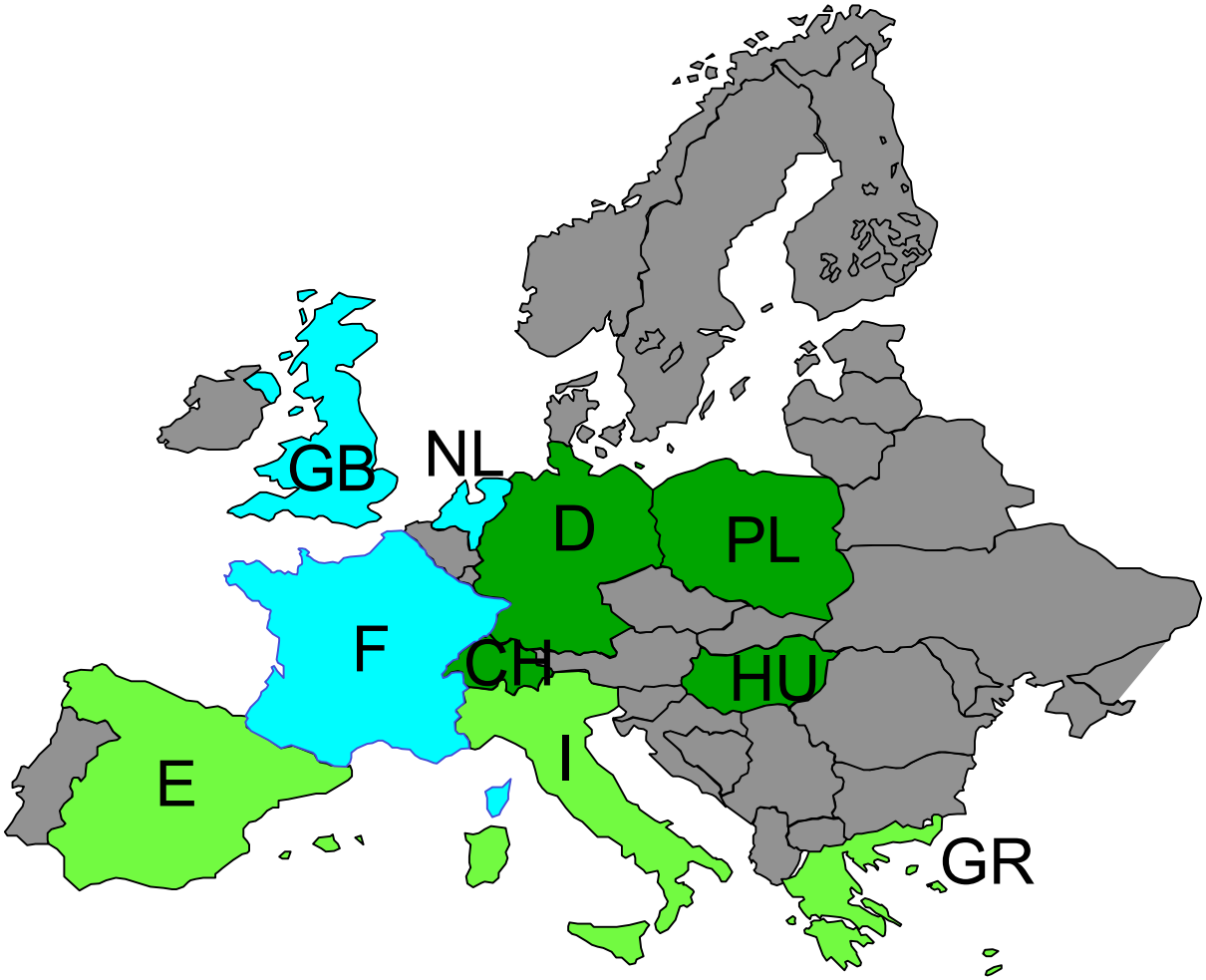
average of 269 questionnaires/unit







1. Skeleton Data - Magazines by Regions



Central
3 Professionals
3 Consumers

West
2 Professionals
2 Consumers

South
1 Professional
6 Consumers

2. Personal Information - Overall Results

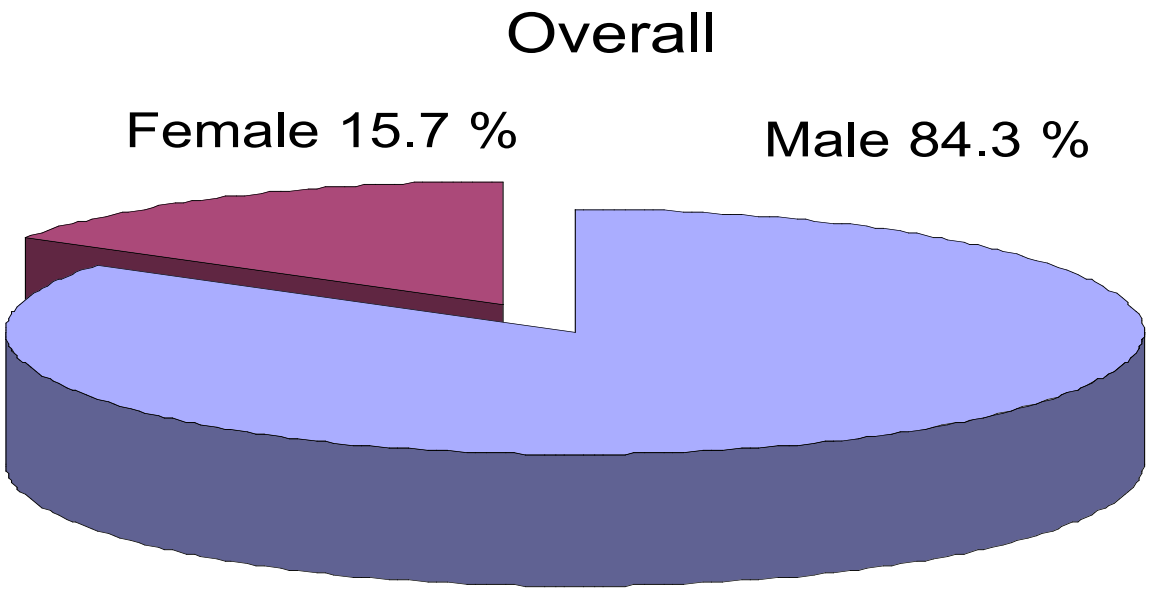
Initial comment: In the surveys the readers often left questions unanswered. The results with the personal information are presented without these missing data and extrapolated to 100%.

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

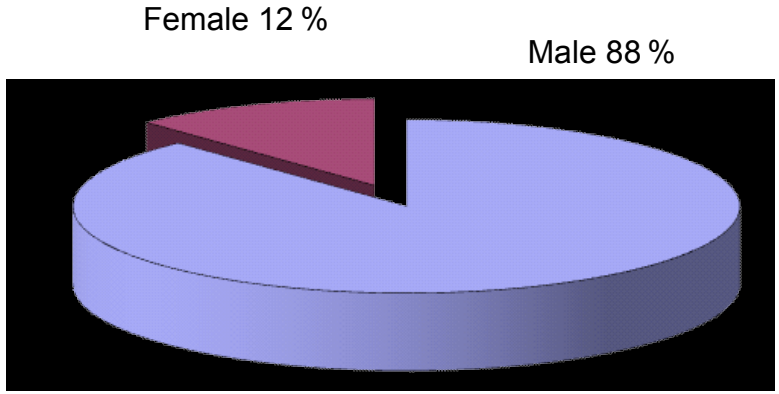
- The average reader is 44 years old. On average, the women are clearly younger than the men (36 to 45 years). Half of the readers are between 30 and 50 years of age.

- In the group of magazines for consumers more than every second reader (53 percent) reported a net monthly household income of 2,000 Euros or more. Nearly every third (31,5 %) household has an income of under 1,500 Euros.

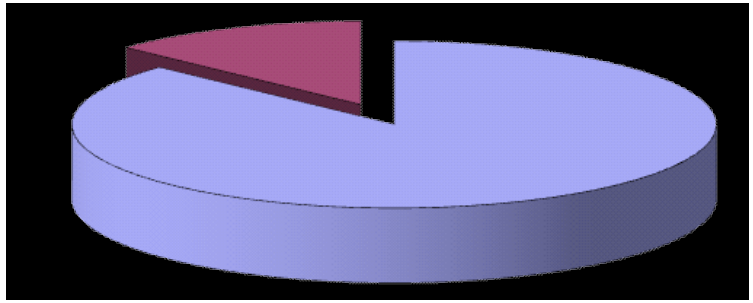
2. Personal Information - Sex



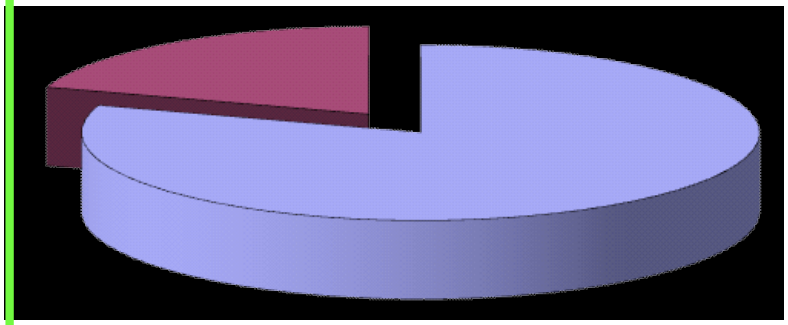
2. Personal Information - Readership by Gender in Each Region I



West



Central



South

Western European magazines have the smallest percentage of female readers.

The magazines in Southern Europe have the highest proportion of women readers.

2. Personal Information - Average Age

Average Age Overall

Total	43.9 years
Male	45.3 years
Female	36.3 years

2. Personal Information - Average Age by Target Group

Average Age - Professionals		Average Age - Consumers	
Total	46.0 years	Total	42.6 years
Male	47.7 years	Male	43.7 years
Female	36.9 years	Female	36.0 years

The average age of the male consumers differs significantly from that of the male professionals.

2. Personal Information - Average Age by Region

Average Age West

Total 48.1 years

Male 49.2 years
Female 39.4 years

Average Age Central

Total 44.6 years

Male 46.2 years
Female 34.4 years

Average Age - South

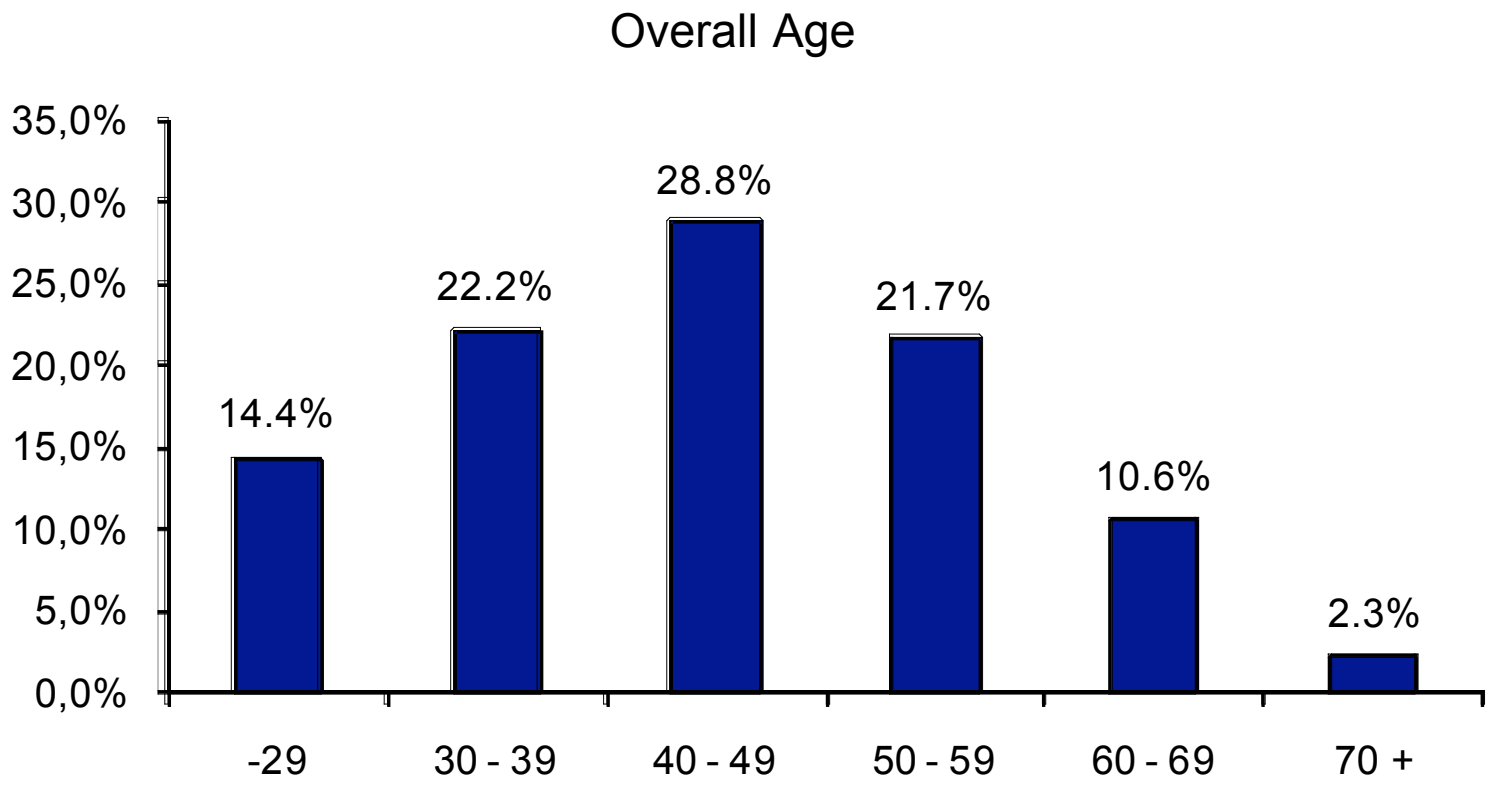
Total 41.3 years

Male 42.5 years
Female 36.7 years

Readers in Western Europe are approximately four years older than the average.

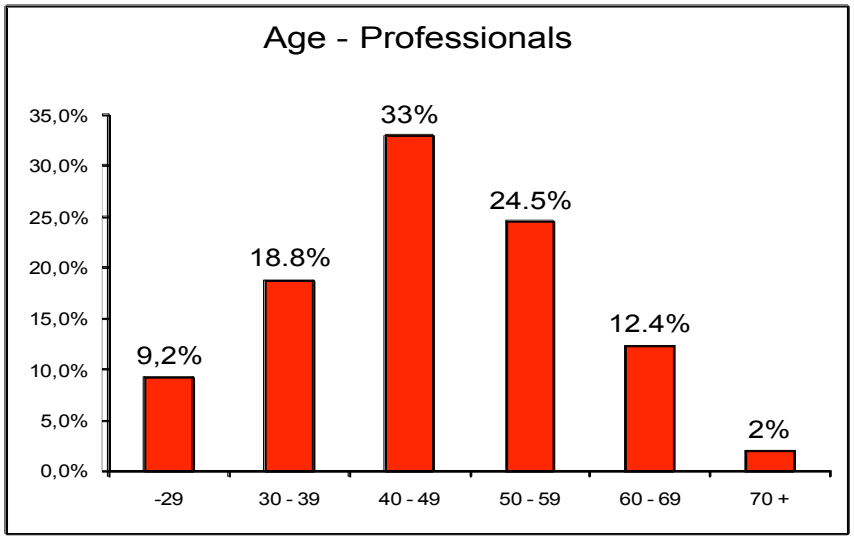
In Southern Europe, the readers are 2.6 years younger than average.

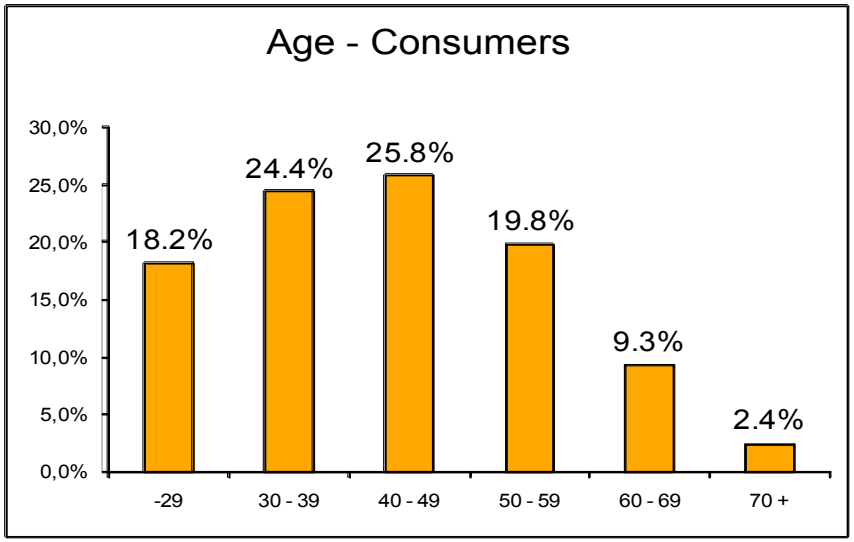
2. Personal Information - Age Distribution



The reader group under 29 years of age is larger than the over-60's.

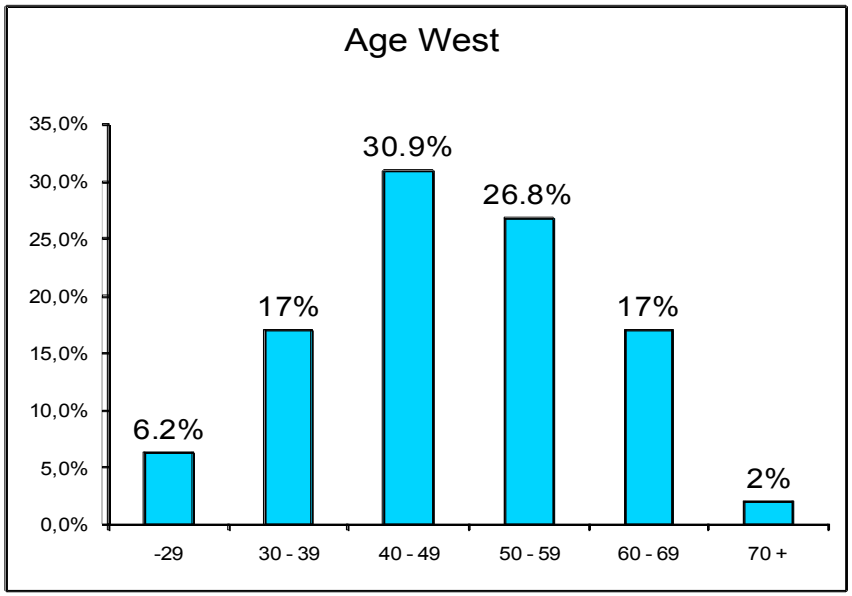
2. Personal Information - Age Distribution by Target Group

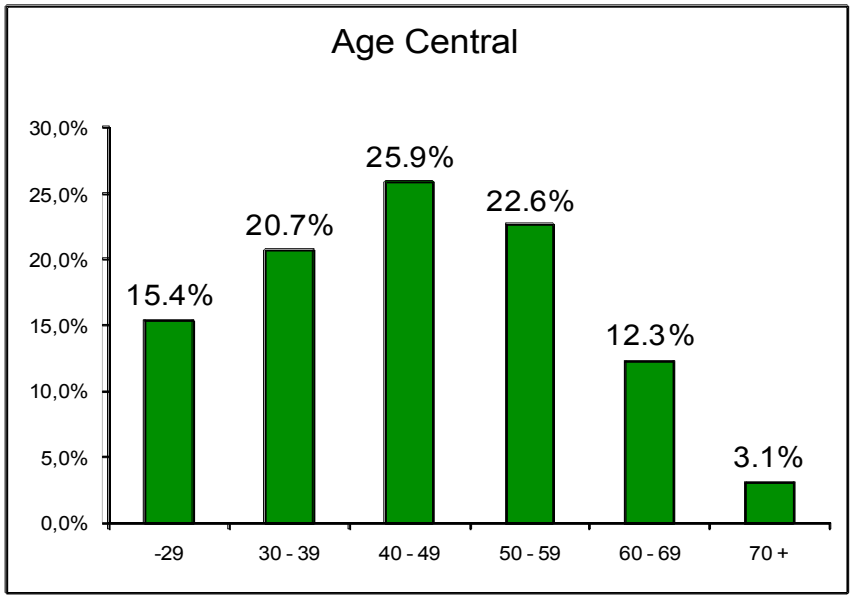




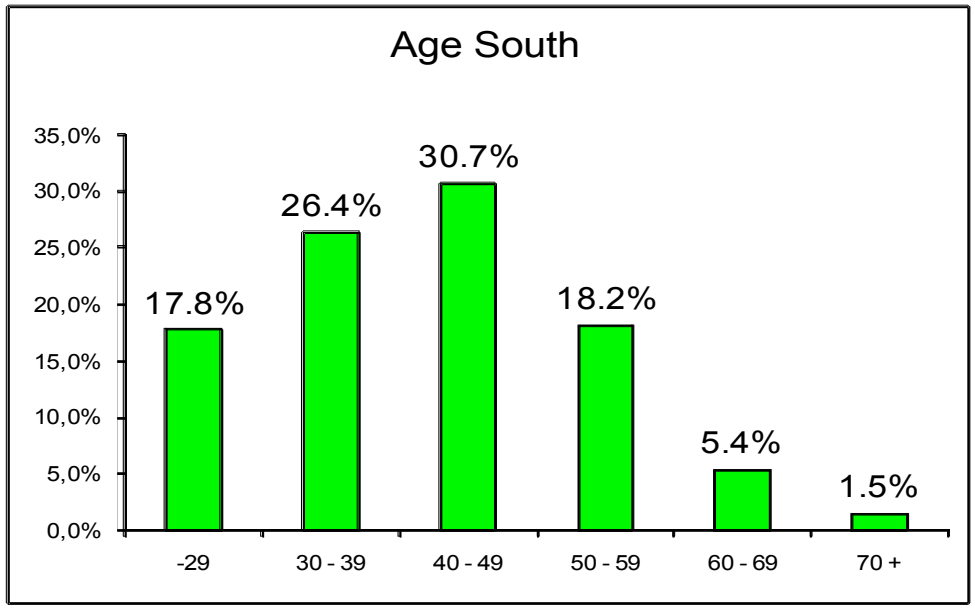
Among the consumers, there are clearly more readers under 40 years than among the professionals.

2. Personal Information - Age Distribution by Region I





2. Personal Information - Age Distribution by Region II

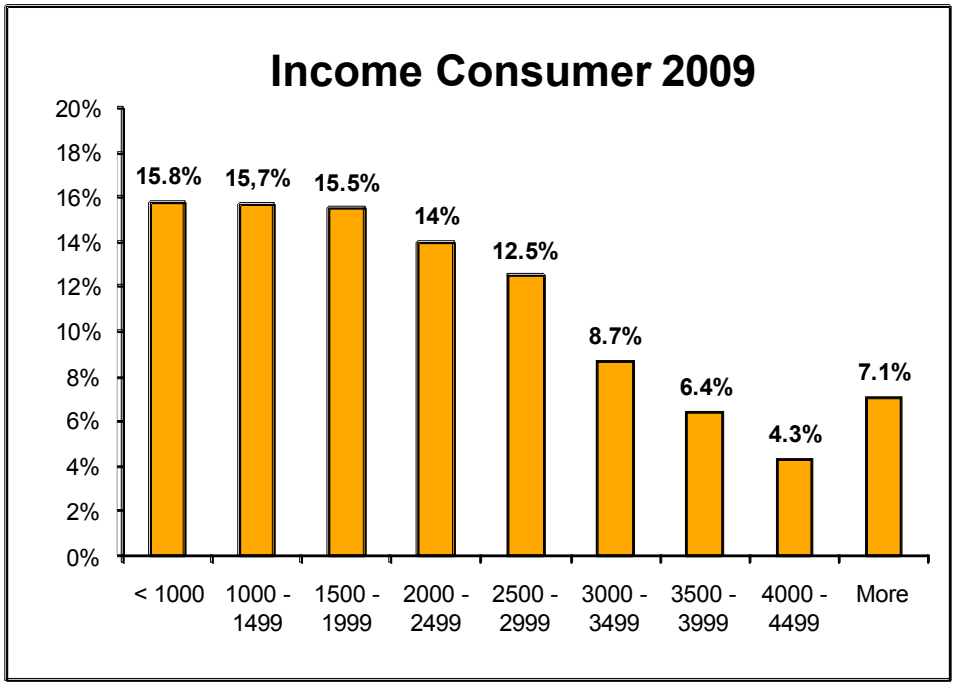


The readership of the magazines in Southern Europe is distinctly younger. 44 percent of the readers are in the age group under 39 years.

These results correspond to the age-structures in the respective populations.

2. Personal Information – Income Consumers

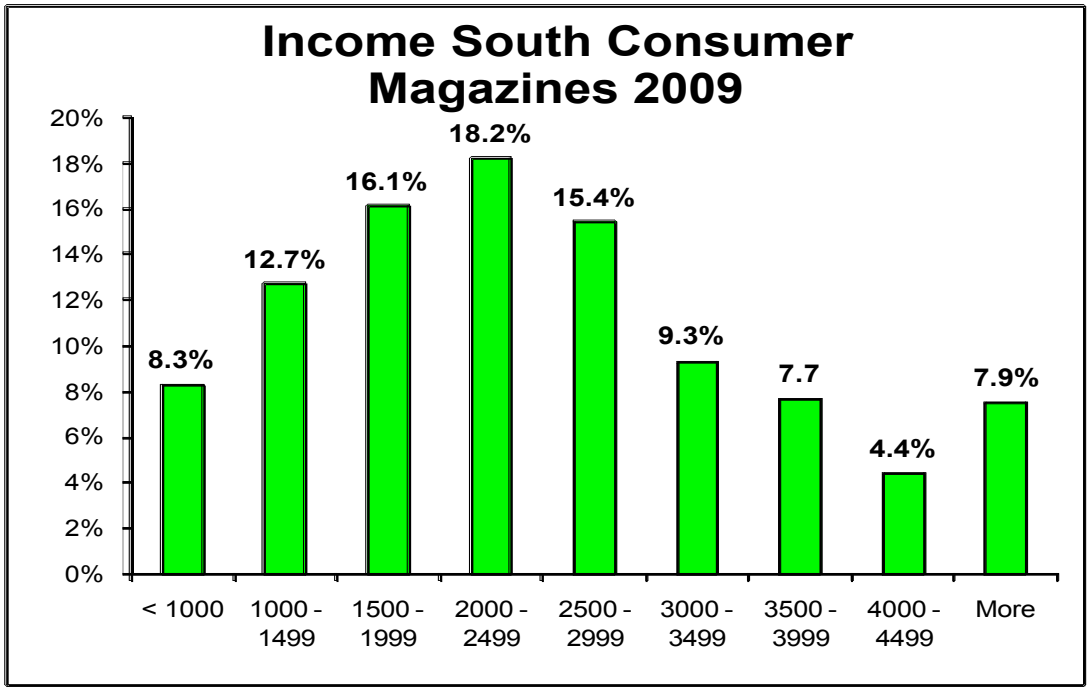
Net Monthly Household Income in Euros



Nearly every third (31,5%) household has an income of under 1,500 Euros.

2. Personal Information - Income Consumers by Regions I

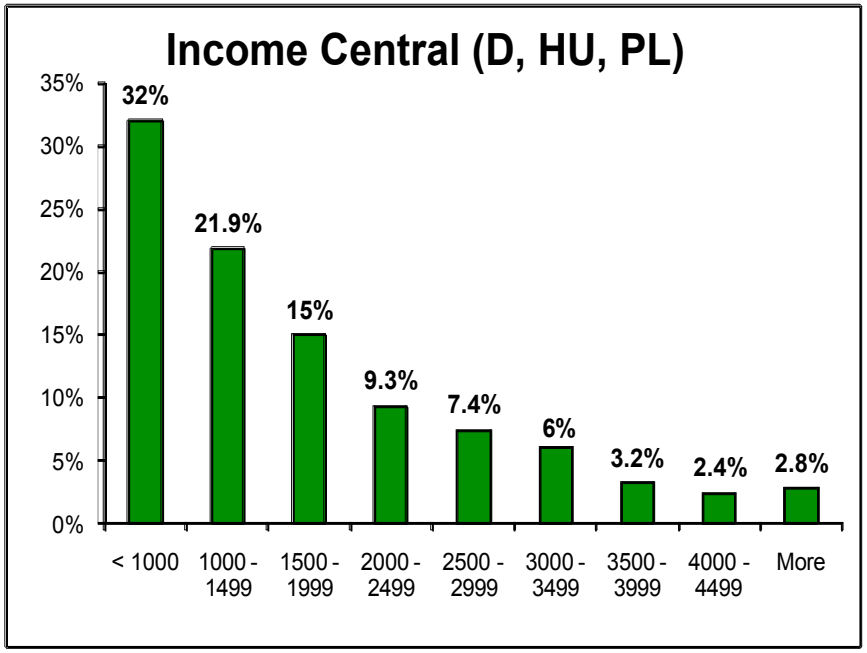
Net Monthly Household Income in Euros

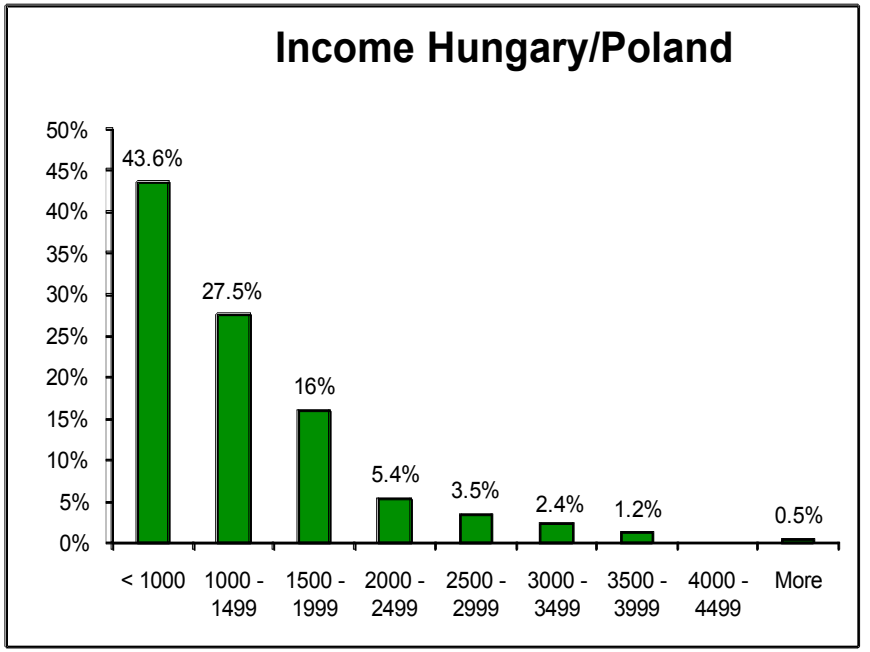


Income Region West: Results only for one magazine

2. Personal Information - Income Consumers by Regions II

Net Monthly Household Income in Euros





Lower incomes in Hungary and Poland

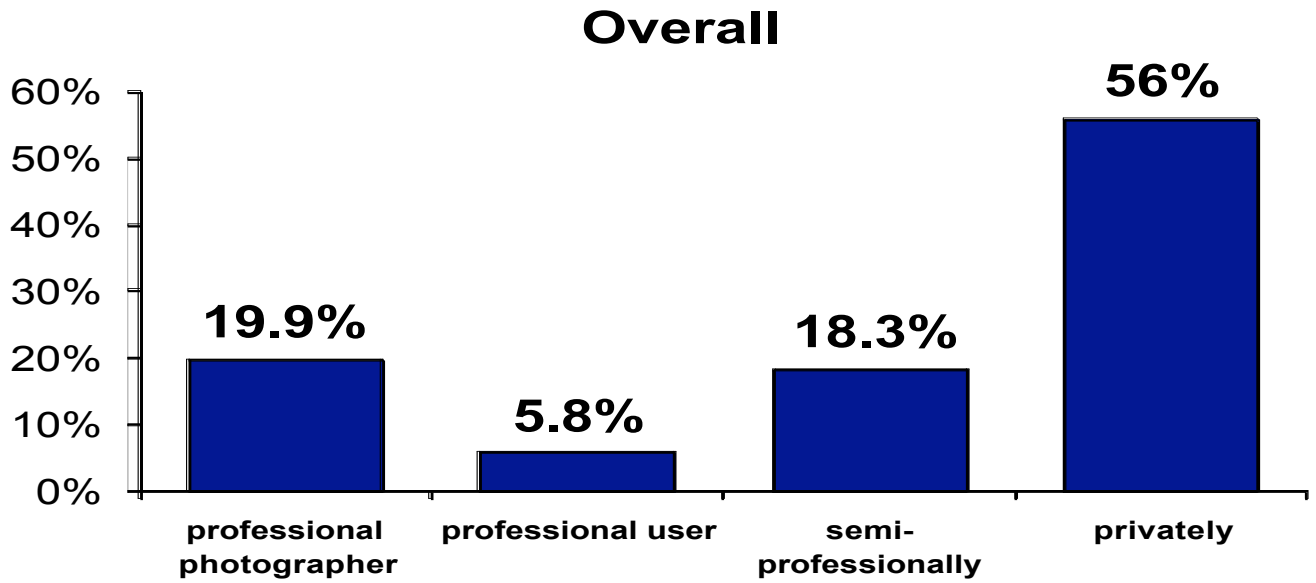
3. Photography Practice Professionals - Overall Results

- The majority of readers – three of four – described themselves as amateurs or as semi-professional photographers.

- Readers of TIPA magazines confirmed their role as multipliers.

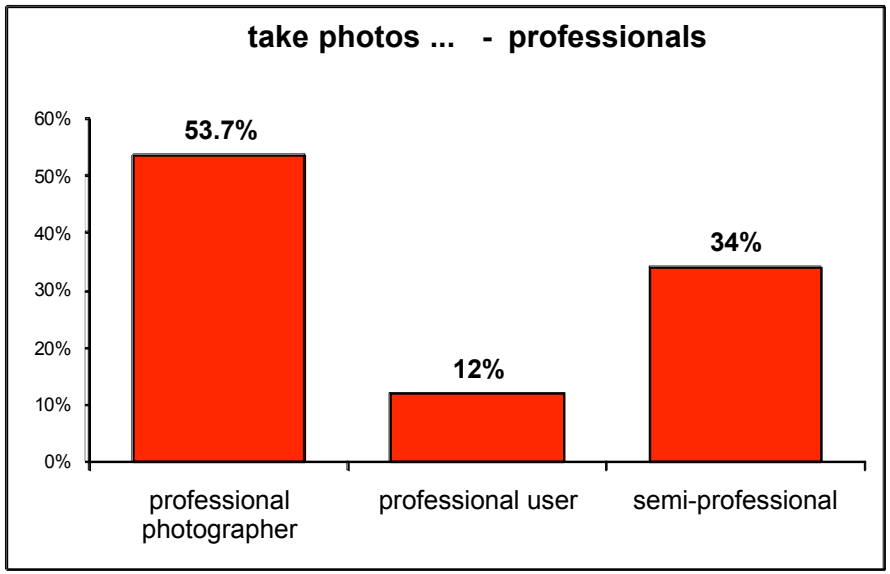
3. Photography Practice: “I take photos...”, I

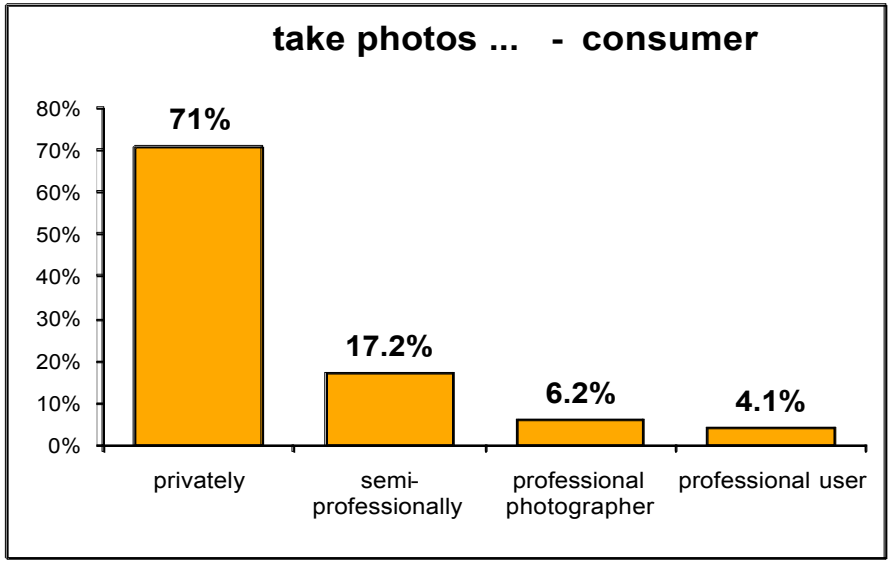
... as a professional photographer
... as a professional user
... semi-professionally
... privately



Some 26 percent of all readers take photographs in a professional capacity. The majority of readers take photos privately.

3. Photography Practice: “I take photos...”, II

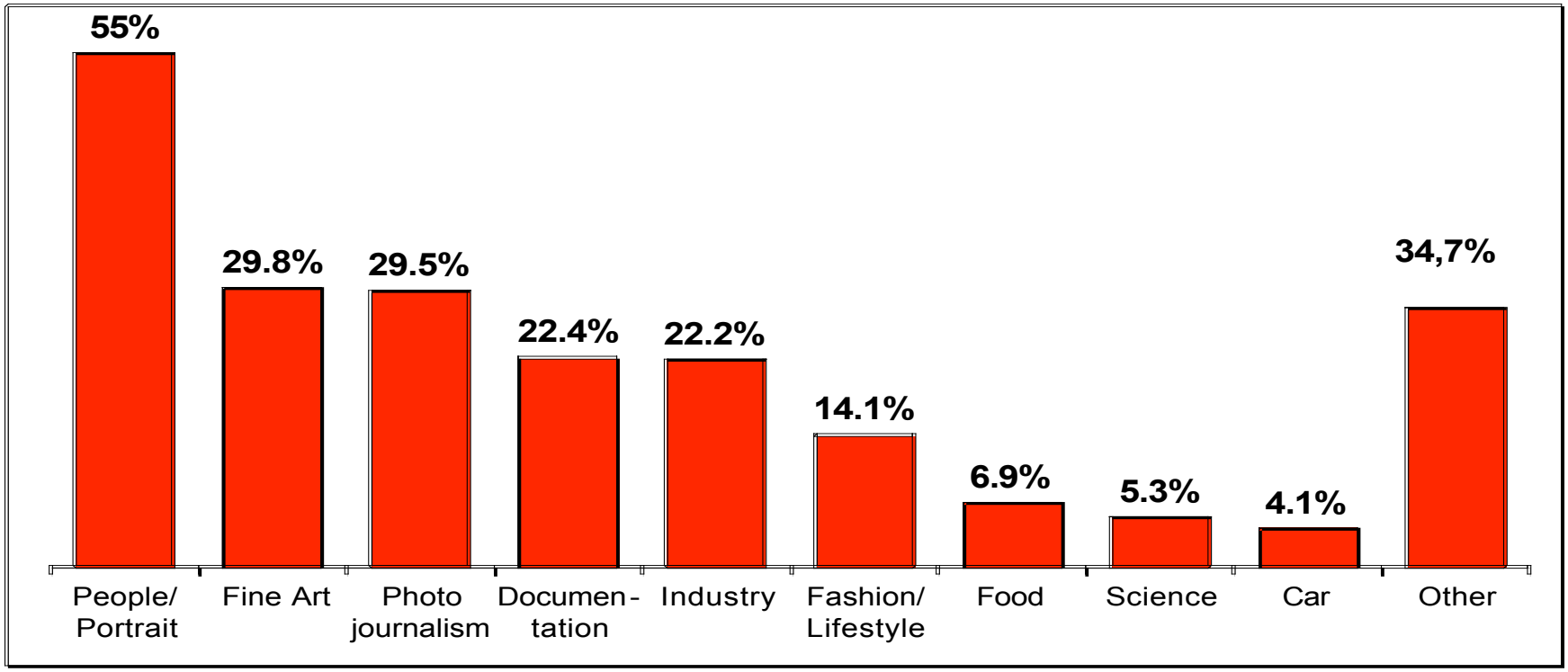




Nearly every third reader of the magazines for professionals is an amateur.

By way of contrast, 10 percent of the readership of the consumer magazines are professionals.

3. Photography Practice Professionals - "I primarily work in the following fields…"



The greatest number of readers of the magazines for professionals work in people/portrait photography. Nearly every third reader is also active in fine art or photo journalism.

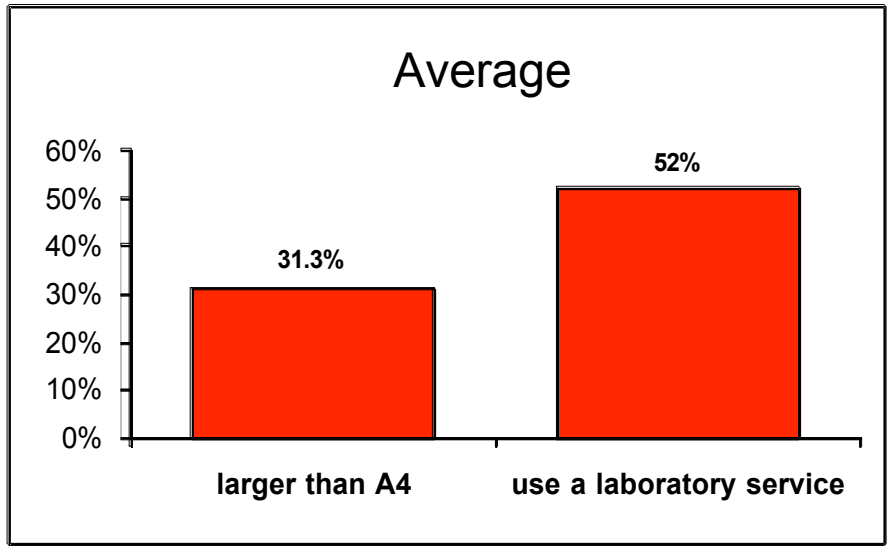
Note: More than one answer was possible

3. Photography Practice Professionals – number of prints per month

All Regions

For my own purposes
Average per month: 119 Prints

For clients/exhibitions
Average per month: 231 Prints



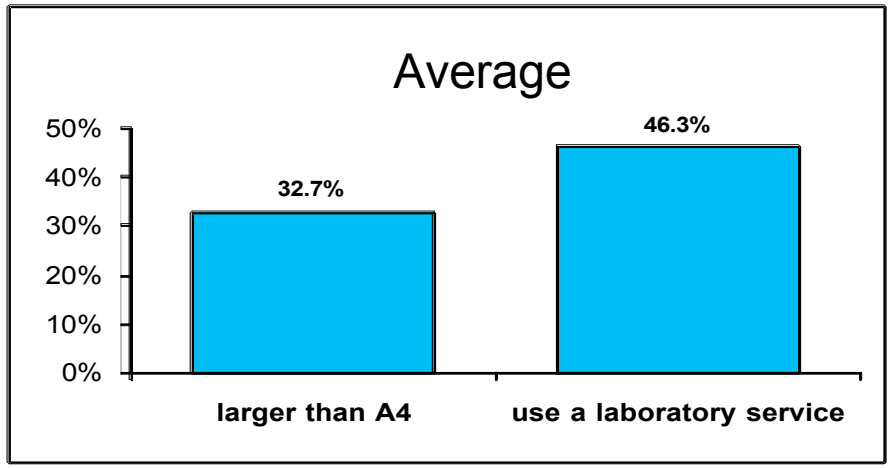
Note: This number may be too high due to a possible translation error in a magazine in the South Region.

3. Photography Practice Professionals – number of prints per month by Regions

WEST

For my own purposes
Average per month: 30 Prints

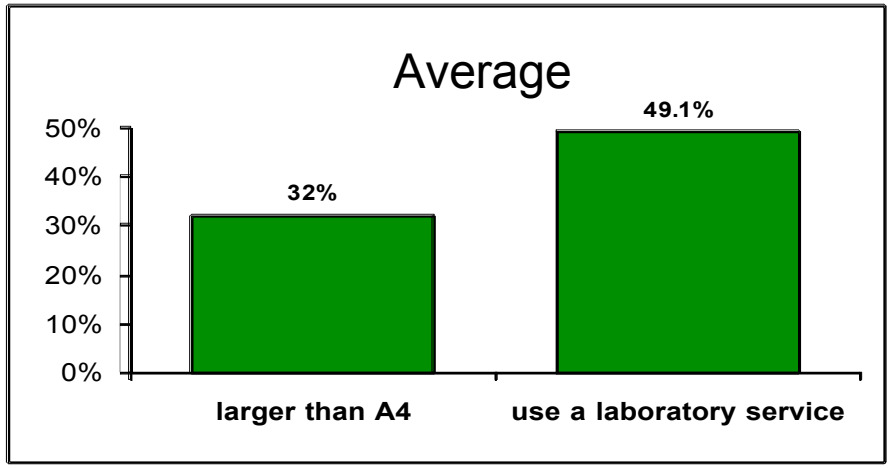
For clients/exhibitions
Average per month: 79 Prints



CENTRAL

For my own purposes
Average per month: 94 Prints

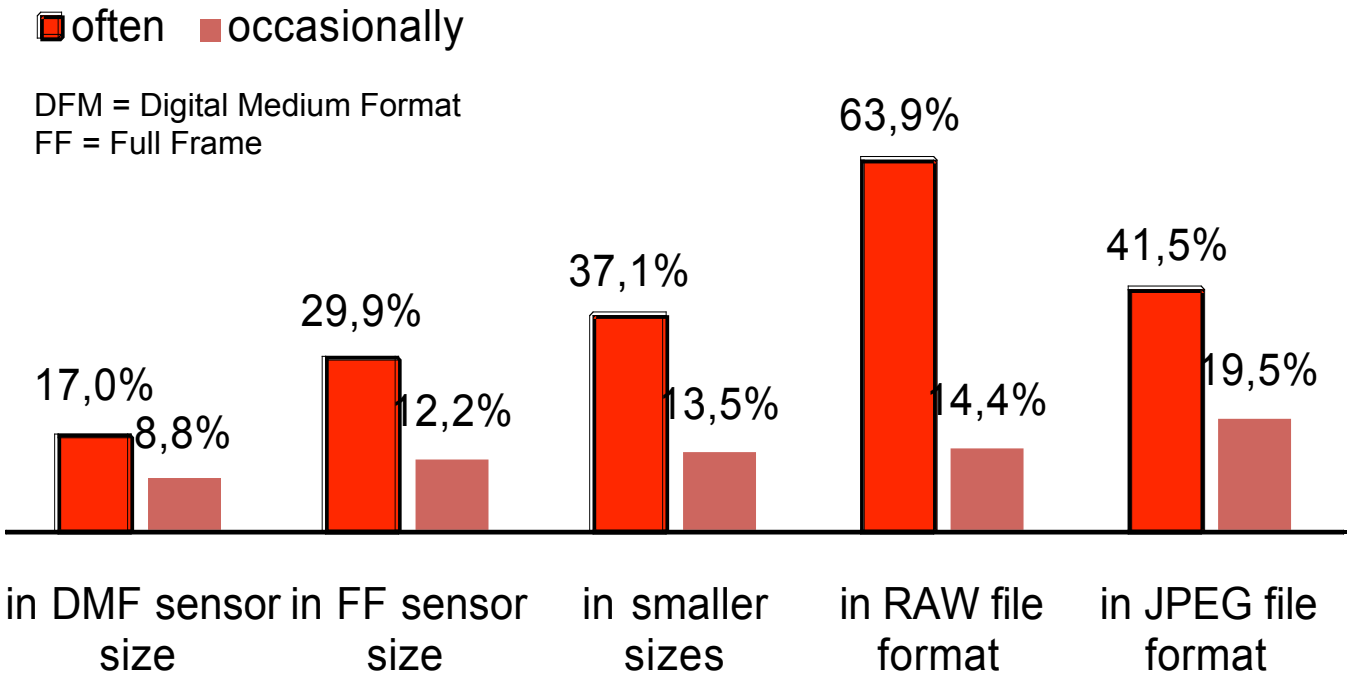
For clients/exhibitions
Average per month: 160 Prints



Region South: Results only for one magazine.

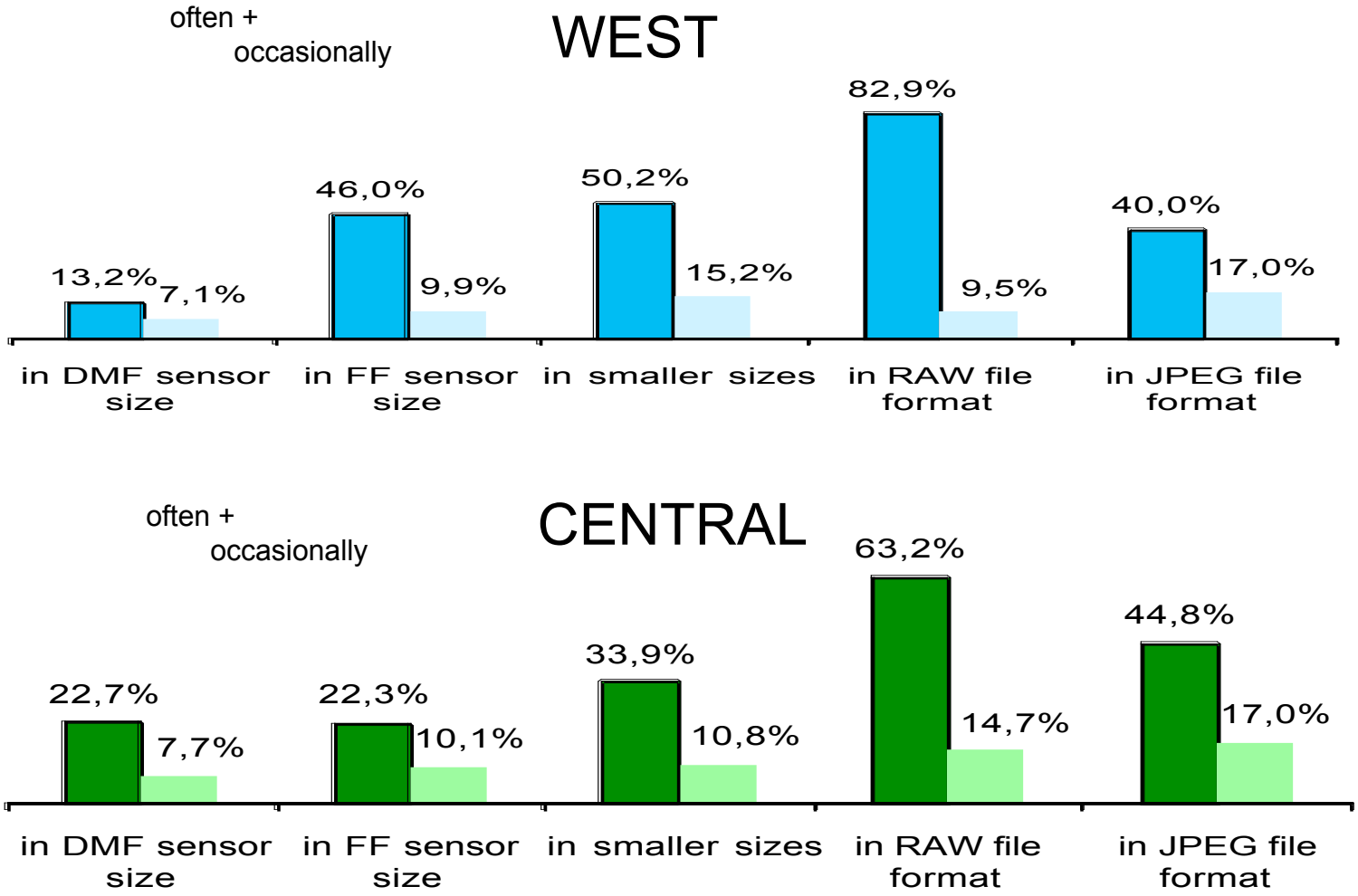
3. Photography Practice Professionals - “My photos are generated ...”, I

Overall



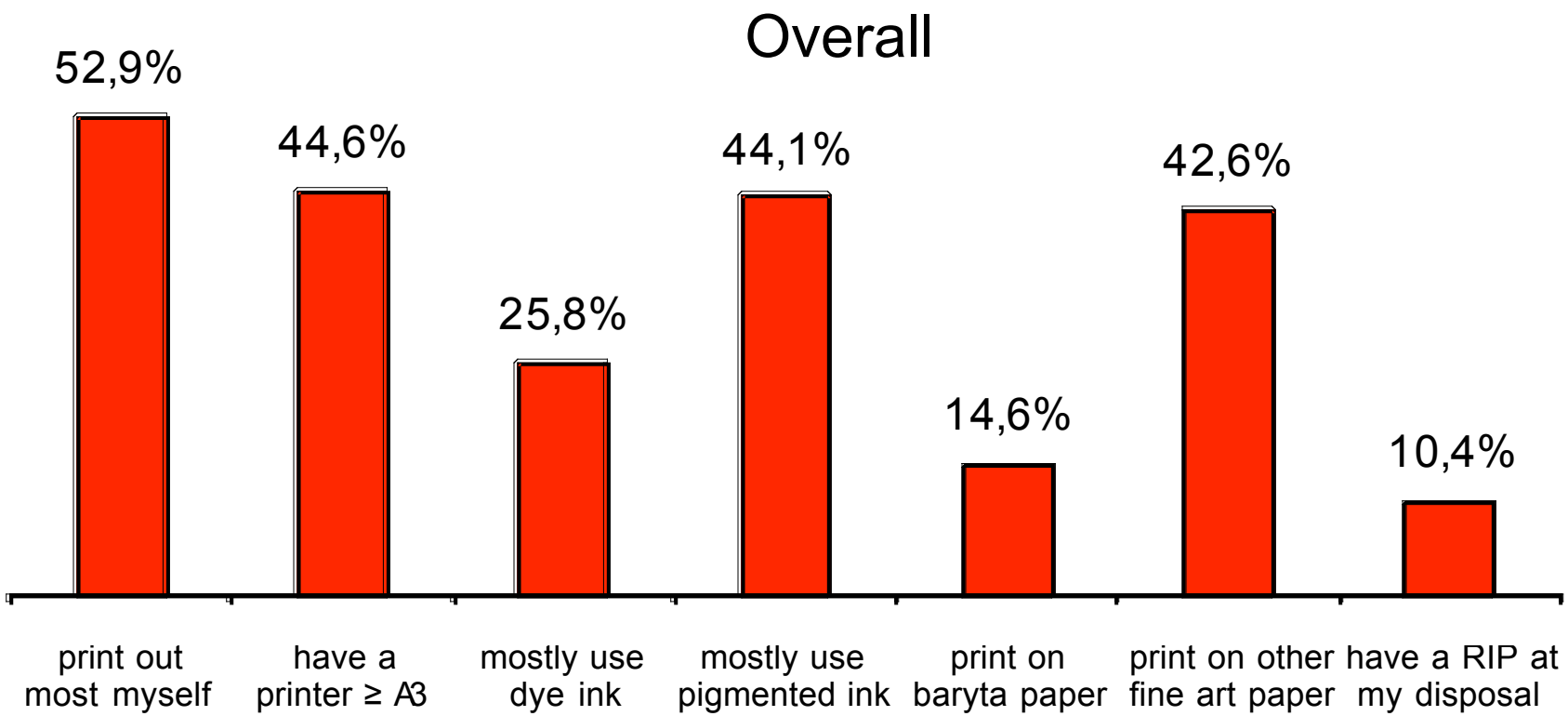
Note: More than one answer was possible

3. Photography Practice Professionals - “My photos are generated ...”, II



Note: More than one answer was possible

3. Photography Practice Professionals - “My prints are generated ...”, I



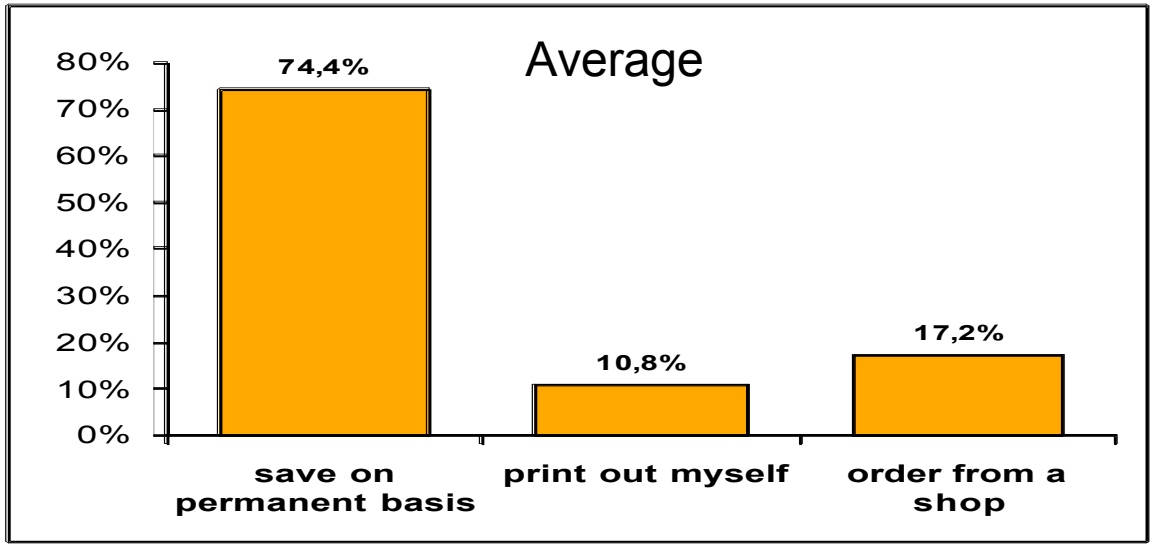
Note: More than one answer was possible

3. Photography Practice Consumers – number of photographs month

All Regions

Average per month:

310 Photographs



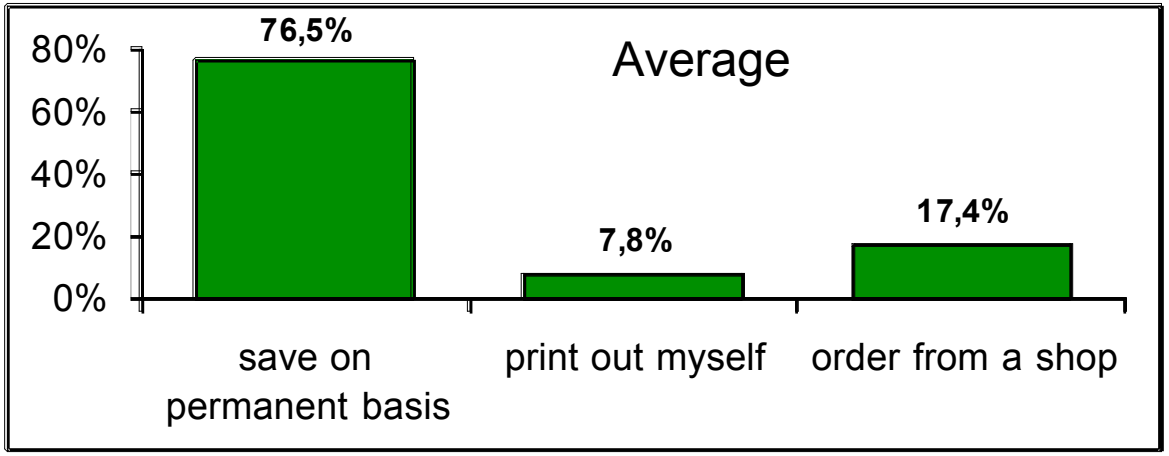
The average consumer takes 310 photographs a month. Around 230 he saves on permanent basis. Around 33 photographs he prints out himself. Around 53 prints he orders from a shop monthly.

3. Photography Practice Consumers –photographs per month by Regions

CENTRAL

Average per month:

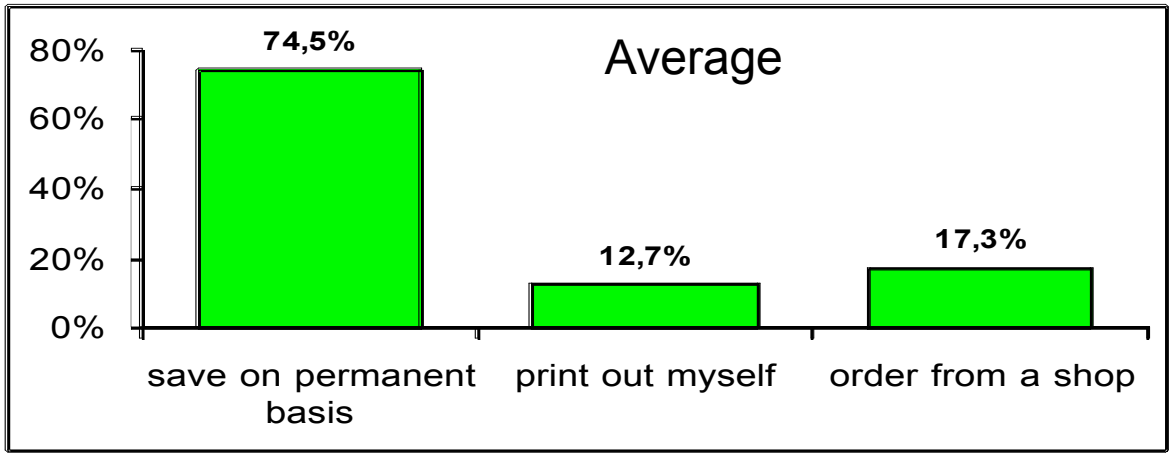
303 Photographs



SOUTH

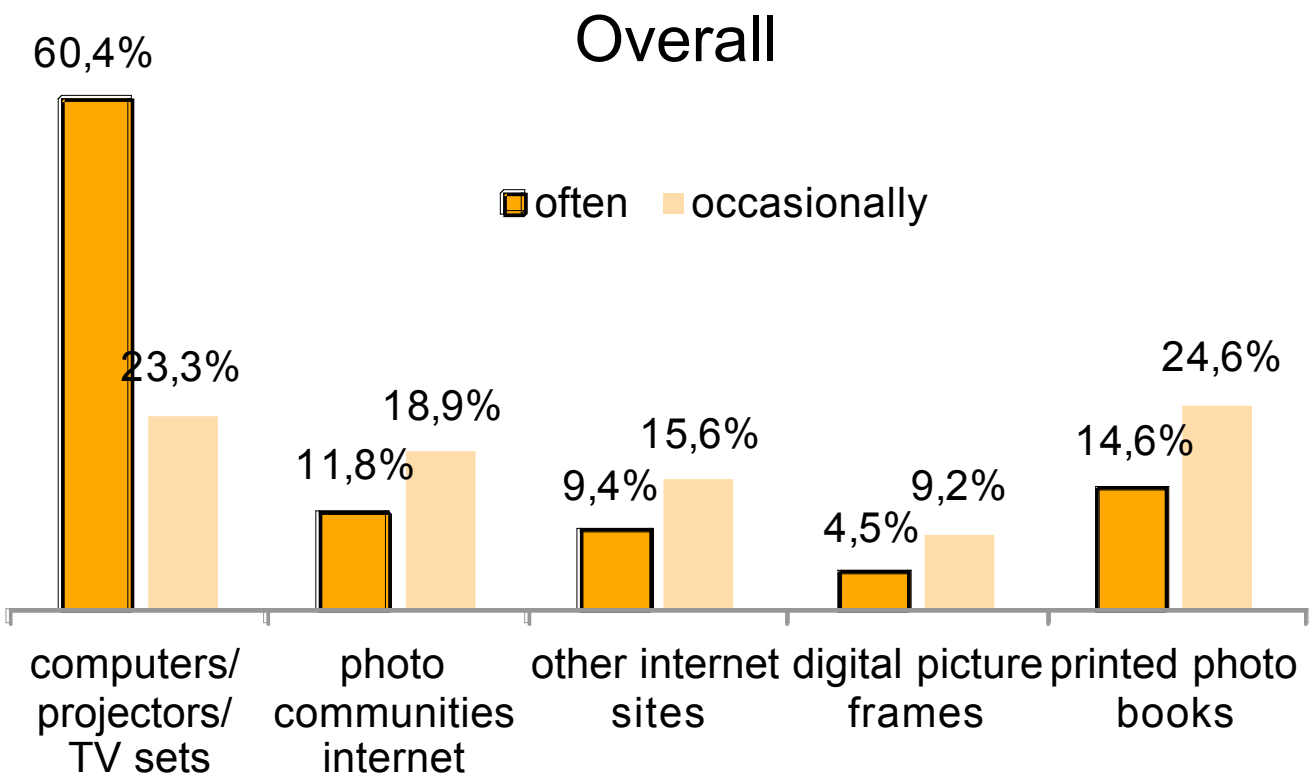
Average per month:

306 Photographs



Region West: Results only for one magazine.

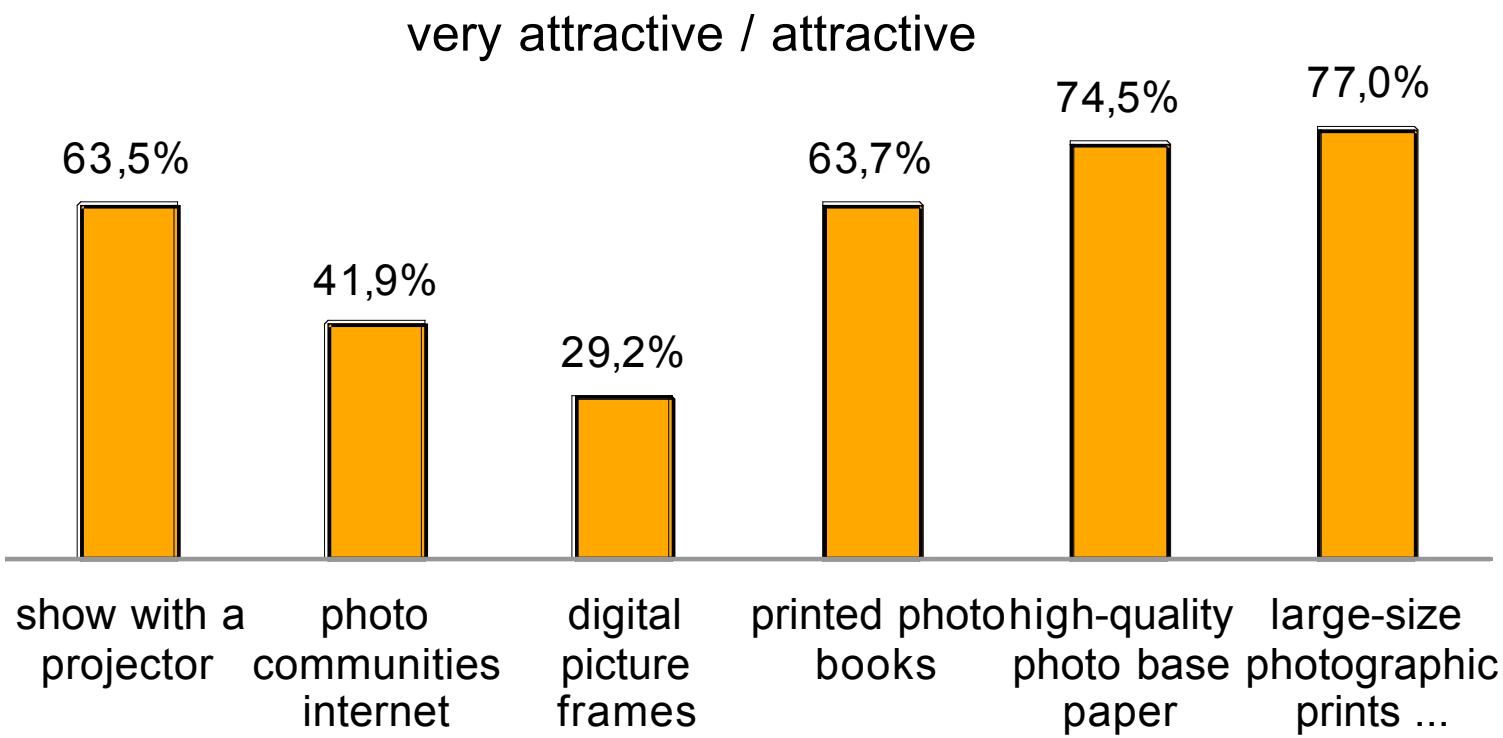
3. Photography Practice Consumers - "To present my photographs, I use..."



Note: More than one answer was possible

3. Photography Practice Consumers - “How attractive are these techniques ...”

Overall



Note: More than one answer was possible

3. Photography Practice Consumers - „The following applies to me“; I

These statements made:

“I frequently participate in **photographic competitions**”

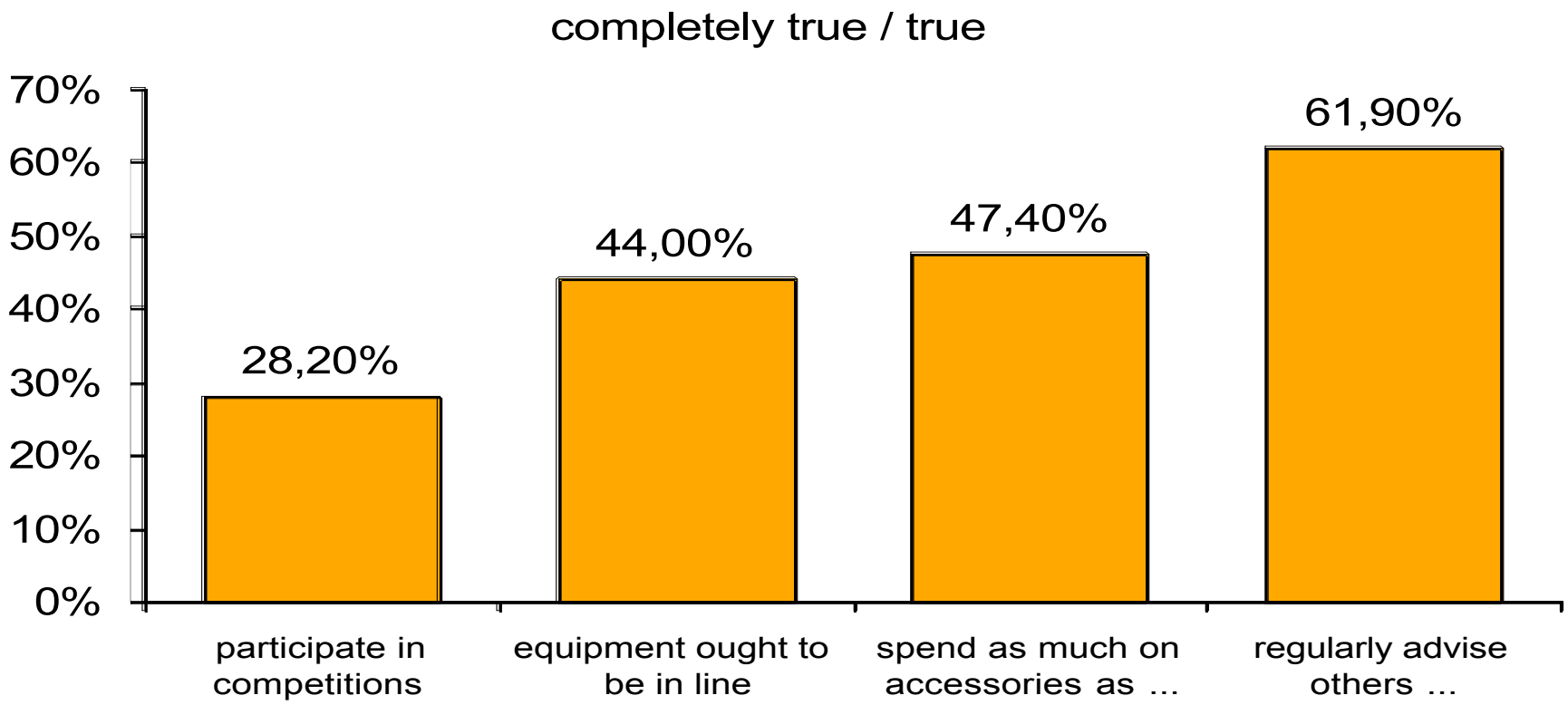
“My photographic equipment ought to be in line with state-of-the art technology”

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

“I regularly **advice** others on the purchase of photographic equipment”

3. Photography Practice Consumers - “The following applies to me” II

Readers as multipliers



4. Reading Behaviour - Overall Results

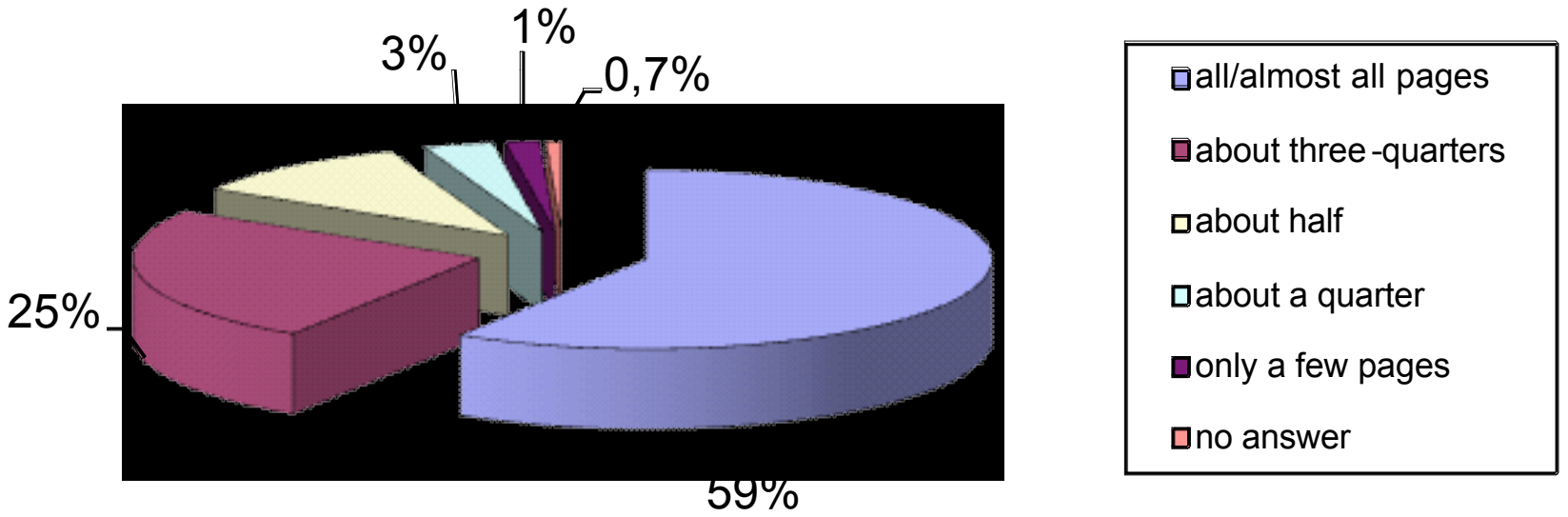
- Every second respondent in the survey was a single copy buyer, 39 percent were subscribers.
  Four Magazines are also distributed as free copies. Every fourth reader in the survey obtained these magazines as free copies.
- The readers pick up their photo magazine an average of 6 times and read it for a total of 82,8 minutes. (Due to the difference in periodic variation, no distinctions were made by target group or by region.)
- Overall, all TIPA titles show an average probability of 84 percent page exposure. This means that advertising customers can be fairly certain that their own advertisements will not be skipped over.
- The vast majority of readers take every issue. Referred to all titles, every single issue on a statistical average reaches almost 72 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

All Magazines:	
Single-copy sales	48.0 %
Subscription	39.1 %
Pass-on reader	4,4 %
Unpaid sample copy	1,4 %
Club or library copy	3,3 %
4 Magazines:	
Free copy	24,7 %

4. Reading Behaviour I

"Of any one issue of {title} I normally read ..."
Overall



Probability of page exposure: 84.0 % (66.0 % - 95.6 %)

4. Reading Behaviour II

Reading Time: 82.8 minutes

Minimum average: 44 minutes
Maximum average: 110 minutes

Frequency of Utilisation per Copy: 6.0

Minimum average: 2.7
Maximum average: 9.0

Readers per Copy: 2.3

Minimum average: 1.6
Maximum average: 3.0

Readers of maximum readership per number:

71.1 % 51.9 % - 96.1 %

5. Attitudes to the Magazines - Overall Results

- Overall, the TIPA readers have a positive opinion of their photo magazine. More than 73 percent of respondents agree with all provided statements.

- 94 percent of the readers classify their magazine as an “important magazine”, 92 percent as “reliable and competent”.

- Seen objectively, photo magazines are the most important sources of information for the readers. Fully 96 percent of respondents say they regularly obtain information from this source.

- 54 percent of respondents say they rely on photo magazines the most. A further 18 per cent did not give any details on the source they trust the most.

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

important magazine	94.3 %
reliable and competent	91.6 %
I would miss it	86.3 %
inspiring magazine	82.7 %
high level of practical use	86.0 %
tips for selecting accessories	80.5 %
tips for buying cameras	83.2 %
makes market transparent	73.1 %

5. Attitudes to the Magazines - Information Sources

- After photo magazines, the internet is the second-most important source of information, being used by 74 percent of readers. Company brochures and the readers' specialist dealers followed.
- What was remarkable was the difference between professionals and consumers in their use of trade fairs and company brochures.
- Overall, the professionals use more sources than the consumers.
- Only every fourth reader uses computer magazines and every fifth reader uses multi-topic magazines to obtain information about photographic equipment.

I regularly obtain information... (in %)

	Total	Profess.	Consumers
photo magazines	95.7	94,9	96.2
internet	74.2	71.6	76.0
company brochures	33.5	43.6	26.8
my specialist dealer	31.2	39.7	25.4
trade fairs	30.8	47.5	19.6
computer magazines	26.5	29.1	24.7
multi-topic magazines	20.6	16.4	23.4

5. Attitudes to the Magazines - “I trust most in ...”

- The readers rely mostly on the photo magazines. 54 percent of respondents said they rely on this source of information the most. The internet, very important as a source of information, enjoys a high level of confidence for only 15 percent of readers. The dealers follow in third place with 7 per cent of responses. 18 per cent of readers did not give an unambiguous answer.
- The professionals’ degree of reliance on photo magazines is less pronounced than that of amateurs. Overall, they are more sceptical and prefer to form their own opinions using information from several sources.
- The ratings of credibility for computer magazines or multi-topic magazines are very poor (<1,5 %).

5. Attitudes to the Magazines - "I trust most in ..." by Target Group

I trust most in... (in %)

	Total	Profess.	Consumers
photo magazines	53.7	48.4	57.3
the internet	14.9	16.1	14.1
my specialist dealer	7.1	10.2	4.9
trade fairs	3.2	6.1	1.3
company brochures	1.0	1.6	0.7
multi-topic magazines	1.5	1.4	1.5
computer magazines	0.9	1.1	0.8
missing values	17.7	15.1	19.4

6. Attitudes to the Magazine-Websites Overall Results

- 15 of 17 magazines have their own Website on the World Wide Web.
- Three of Four readers have already visited the Website of their photo magazine or use it regularly.
- Every second reader visits the Website of his magazine at least once per 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
- Readers who had already visited the internet sites of their photo magazines judged them as very good. Four of five users found them “a successful site” and agreed with the statement “contains additional, relevant information”.
- Consumers visibly use the Websites more extensively than professionals.

6. Attitudes to the Magazine-Websites
Reasons for Use - All Readers I

I visit the [magazine-] **website,**
(several times a month / once a month, all readers):

to keep up-to-date in matters concerning photography	48.0 %
to look up test reports and photos of tested products	39.2 %
to find out about dates (events, exhibitions, etc.)	36.2 %
to read the classified ads *[only sites with ads]*	17.8 %
to exchange views in the forum *[only sites with forum]*	10.7 %
to buy something in the shop *[only sites with shop]*	9.4 %
to use other services (glossary, archive, gallery etc.)	23.5 %

Note: More than one answer was possible

6. Attitudes to the Magazine-Websites
Reasons for Use - All Readers II

I visit the [magazine-] **Website,**
(several times a month / once a month):

	Professionals	**Consumers**
to keep up-to-date ...	41.4 %	53.0 %
to look up test reports and photos of tested products	35.0 %	42.4 %
to find out about dates	32.3 %	39.4 %
to read the classified ads	8.6 %	22.4 %
to exchange views in the forum	6.2 %	12.3 %
to buy something in the shop	4.0 %	11.3 %
to use other services	20.1 %	26.1 %

Note: More than one answer was possible

6. Attitudes to the Magazine-Websites Rating - Only User I

I regard the content of the website as follows:

(completely true / true;

all users of the magazine websites: 75,4 % of the readers

A successful site for the magazine	82.7 %
Contains additional, relevant information	79.2 %
I find my way about easily here	78.6 %
The Website fulfils my expectations	73.3 %

Note: More than one answer was possible

I regard the content of the Website as follows:

(completely true / true):

	Professionals	Consumers
User / Percent of all readers	68.6 %	80.4 %
Only User:		
A successful site for the magazine	79.4 %	85.1 %
Contains additional, relevant information	75.8 %	81.8 %
I find my way about easily here	81.4 %	76.5 %
The website fulfils my expectations	73.6 %	73.7 %

Note: More than one answer was possible

Both target groups think their magazines have successful Websites.

7. Buying Behaviour and Attention to Advertisements - Overall Results

- Interchangeable lenses are the readers' top priority in purchasing intentions, followed by digital SLR cameras. Illustrated photobooks follow in third place for readers of the consumer magazines, photo/graphics software follow in third place for readers of the magazines for professionals.

Adding up everything, **last year every reader of the magazines for professionals spend approximately 8.030 EUR** on his photo equipment, expenditure on consumables and laboratory services.

- 82 per cent of the TIPA readers say that they always or often read advertisements. And four out of five readers also find that advertisements have informational value.

- Every second reader was prompted by an advertisement into buying a photography-related article.

7. Buying Behaviour and Attention to Advertisements - “I intend to buy...” I

	Total	Professionals	Consumers
Interchangeable lenses	55.5%	59.7%	52.7%
Digital SLR cameras	46.9%	50.8%	44.4%
Illustrated photo books			34.9%
Memory modules		28.5%	
Photo/Graphics software	25.1%	32.9%	19.9%
Studio Lighting	17.6%	24.2%	13.2%
Tripod	16.7%	13.8%	18.6%
Photo printer A3 or A3+	15.6%	18.2%	13.8%
Color management system	9.4%	14.4%	6.1%
Color graphics monitor		15.9%	
Digital compact camera			13,0%
Scanner	10.3%	9.6%	10.7%
Photo printer A2 or larger		8.6%	
Projector	7.9%	8.9%	7.3%
Digital medium format system		7.4%	
Digital camera back (alone)		6.1%	
Photo printer A4 or smaller		6.8%	
Superzoom (Bridge) Camera			4.6%

7. Buying Behaviour and Attention to Advertisements - Advertisements I

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

- Every third reader fully agrees (“completely true”) with the statement that advertisements have informational value. A further 42 per cent confirm this with “true”.

- Some 50 percent were prompted by an advertisement into buying a photography-related article.

7. Buying Behaviour and Attention to Advertisements - Advertisements II

(always/often in %)

	Total	Profess.	Consumers
I read the advertisements	81.6	80.5	82.4
Advertising in the magazine...			
- have informational value for me	79.0	78.0	79.7
- have prompted me to make a purchase in the past	49.8	51.6	48.5

7. Buying Behaviour and Attention to Advertisements - Advertisements III

(always/often in %)

	West	Central	South
I read the advertisements	78.3	78.4	86.5
Advertising in the magazine...			
- have an informational value for me	74.1	76.7	83.8
- have prompted me to make a purchase in the past	53.1	44.4	53.5

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