Readership Survey 2011
- 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 19 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 19 magazines.

Duration: October 22nd 2010 – February 24th 2011

Participants: 23 magazines from 14 countries

Total returns N = 10 281
Analysed returns: Na = 8 195

Returns by mail: 41.1 %
Returns by fax: 11.6 %
Returns online: 47.0 %

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 103 questionnaires and the largest consisting of 2 695. The analysed returns ranged from 103 to 1436.

On average, each magazine achieved an return rate of 446 questionnaires.

1. Skeleton Data - Method II

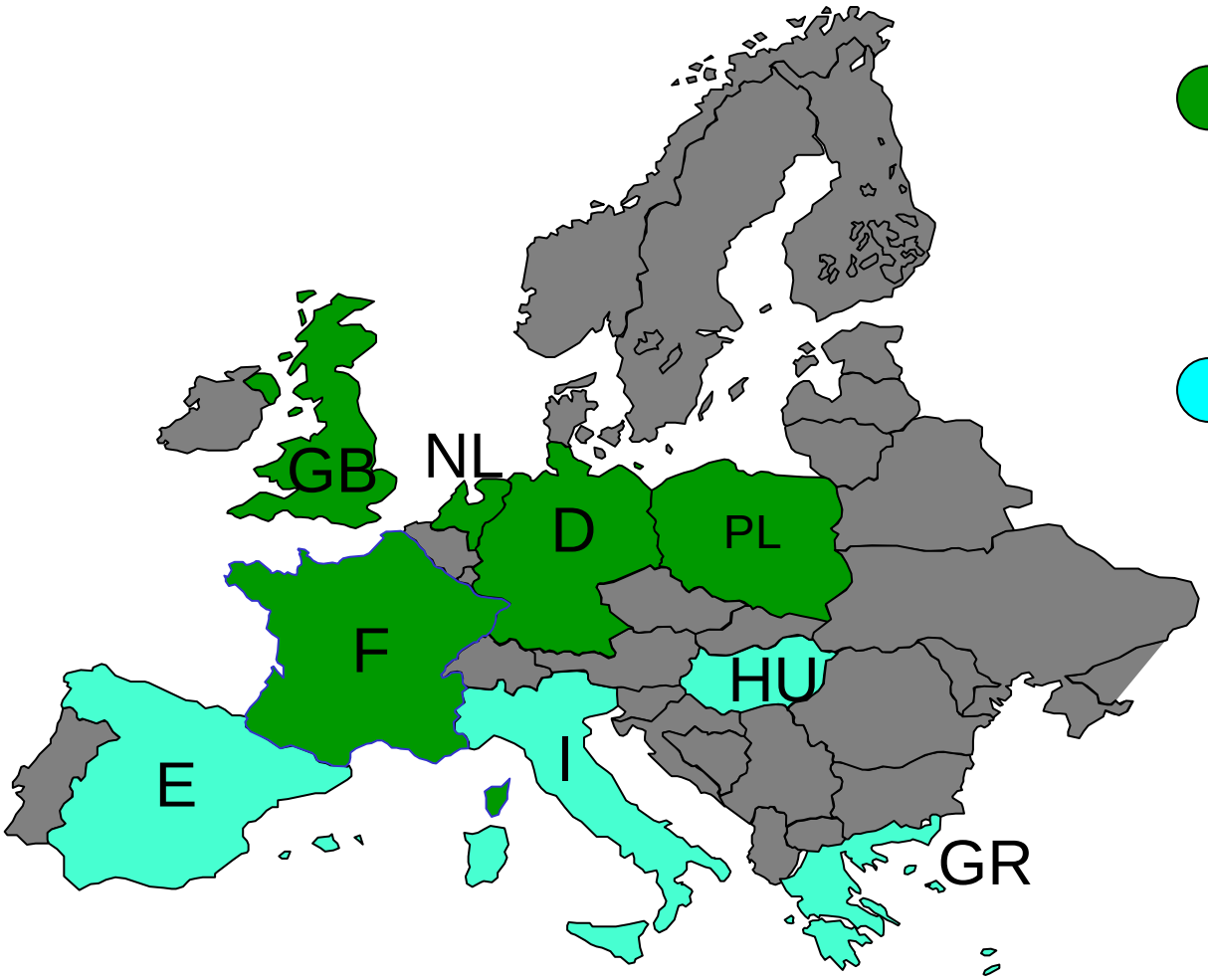
Presentation of the Results

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
  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
9 Magazines

Southern Europe
4 Countries
9 Magazines

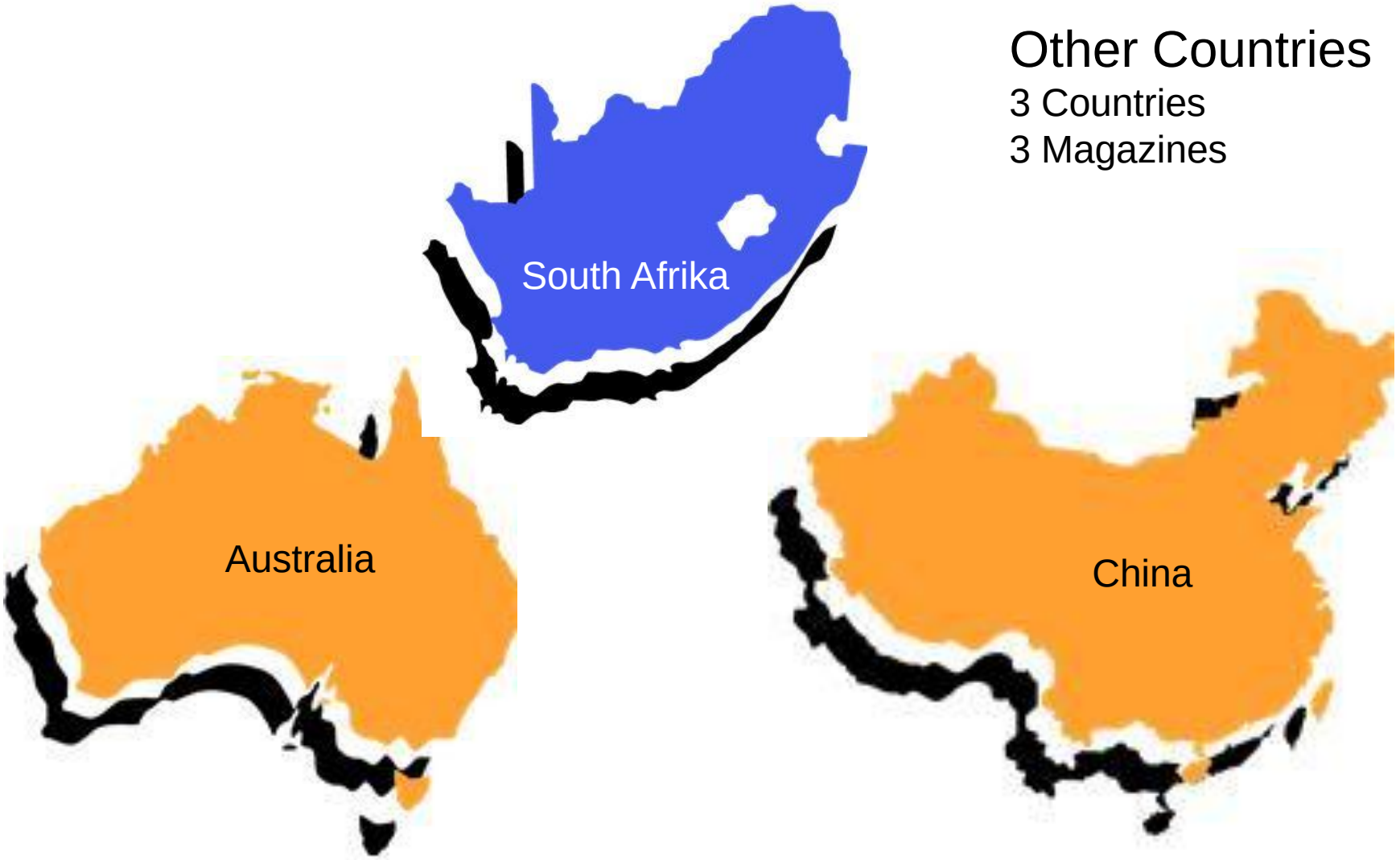
1. Skeleton Data - Magazines by Regions

Northern America

2 Countries

2 Magazines

1. Skeleton Data - Magazines by Regions



Other Countries

3 Countries
3 Magazines

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%.

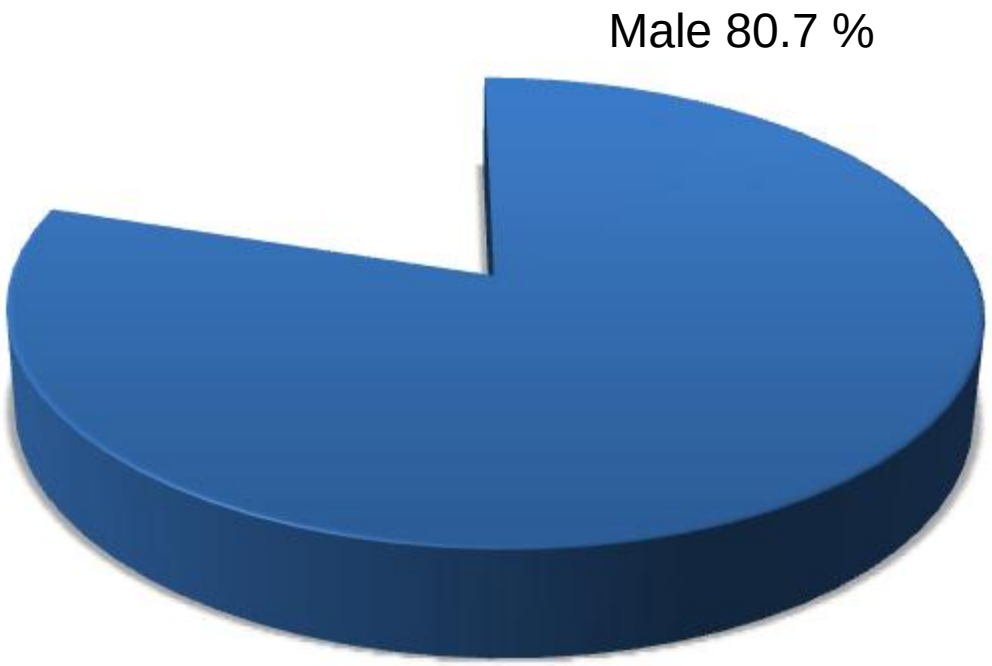
- The readers of the TIPA-magazines are predominantly male. Only nearly every fifth reader is female.

- The average reader is 44.7 years old. On average, the women are clearly younger than the men (38 to 46 years). 61 percent of the readers are younger than 50 years of age.

- 44 percent of readers reported a net monthly household income of 2 500 Euros or more. 29 Percent of households have an income of under 1 500 Euros.

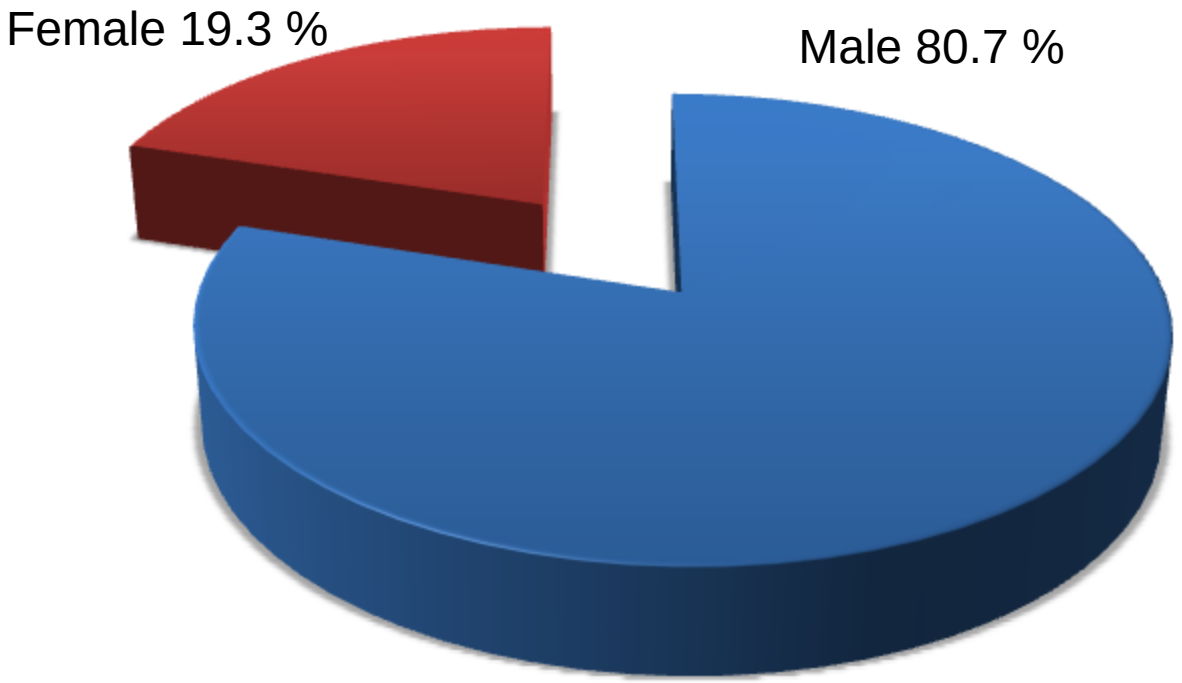
2. Personal Information - Sex

Overall



2. Personal Information - Sex

Overall



2. Personal Information – Readership by Gender in Each Region

Central Europe

Male 86.7 percent
Female 13.3 percent

Southern Europe

Male 75.7 percent
Female 24.3 percent

Northern America

Male 77.7 percent
Female 22.3 percent

Other Countries

Male 80.3 percent
Female 19.7 percent

2. Personal Information - Average Age

Average Age Overall

Total	44.7 years
Male	46.2 years
Female	38.4 years

2. Personal Information - Average Age by Region

Average Age Central Europe

Total	**46.3 years**
Male	47.3 years
Female	40.1 years

Average Age Southern Europe

Total	**40.0 years**
Male	42.0 years
Female	33.9 years

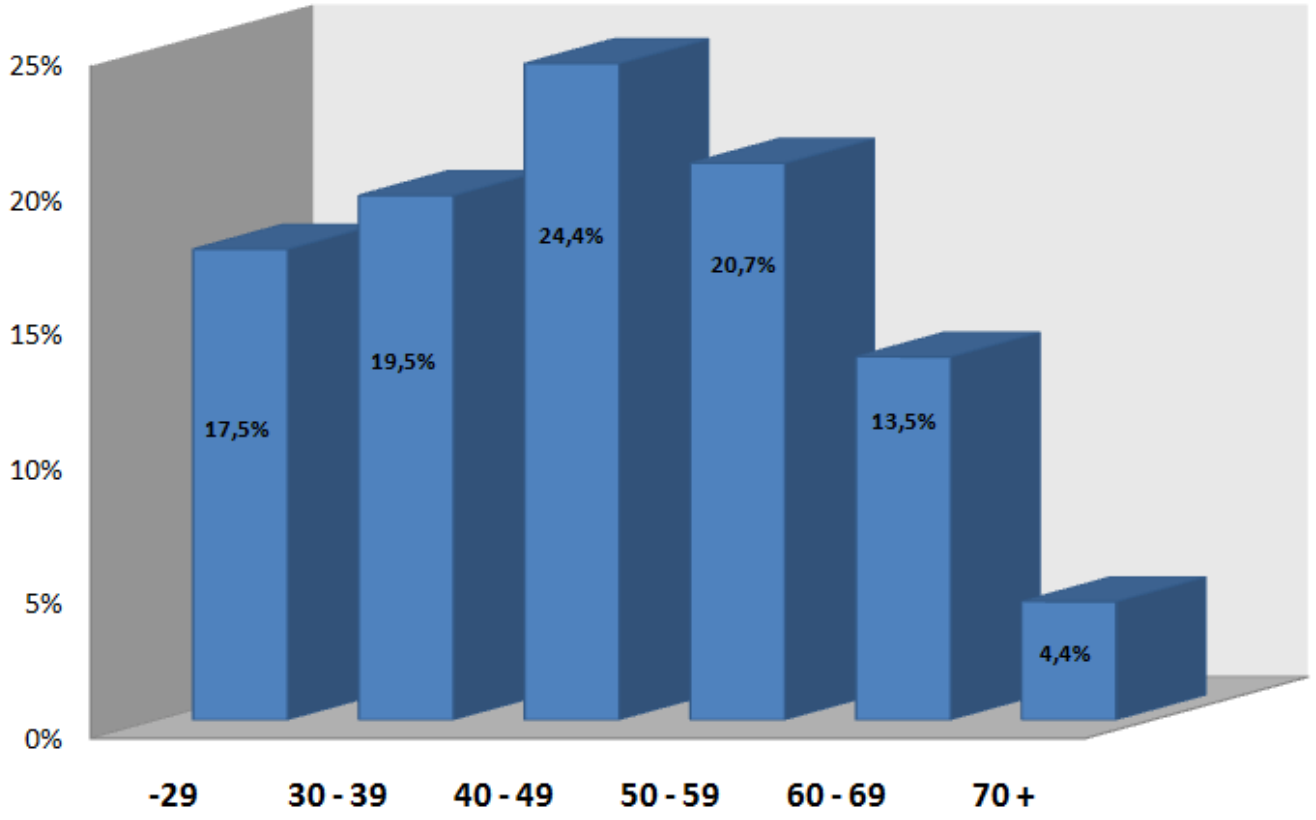
Average Age Northern America

Total	**56.4 years**
Male	57.9 years
Female	49.8 years

Average Age Other Countries

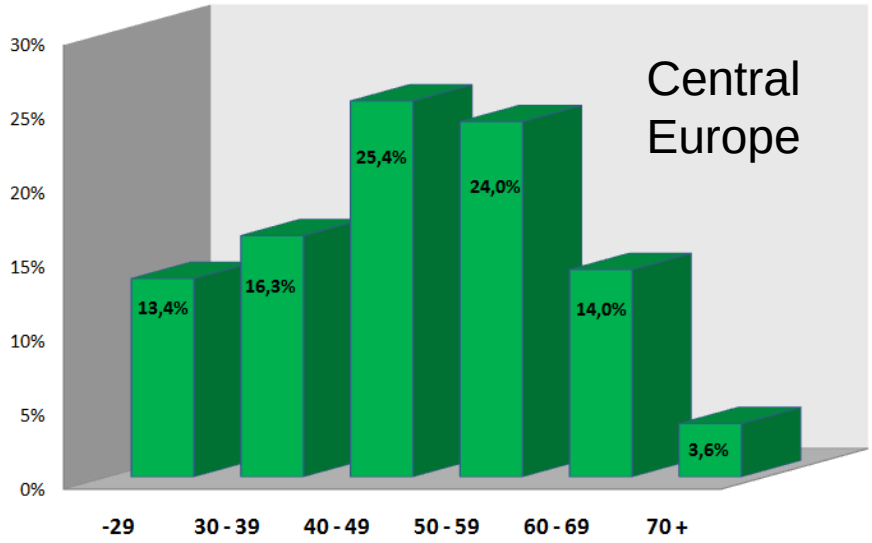
Total	**45.8 years**
Male	47.4 years
Female	39.3 years

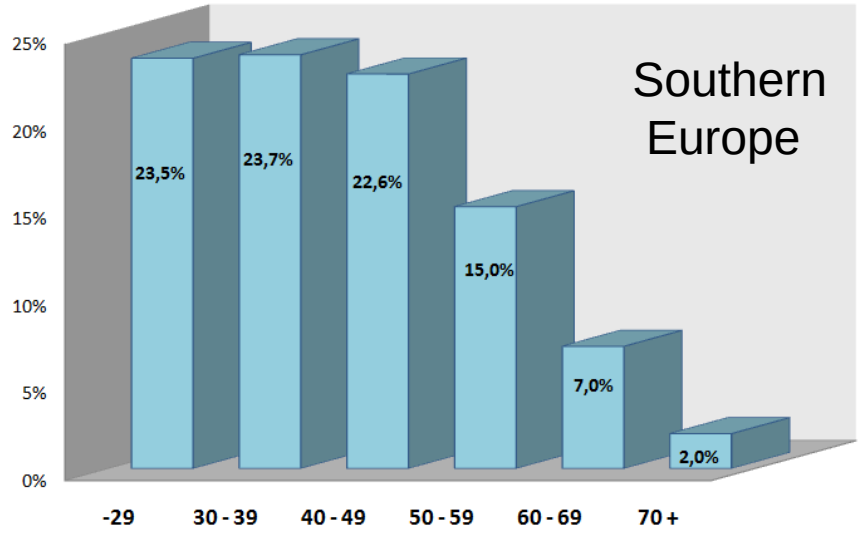
2. Personal Information - Age Distribution

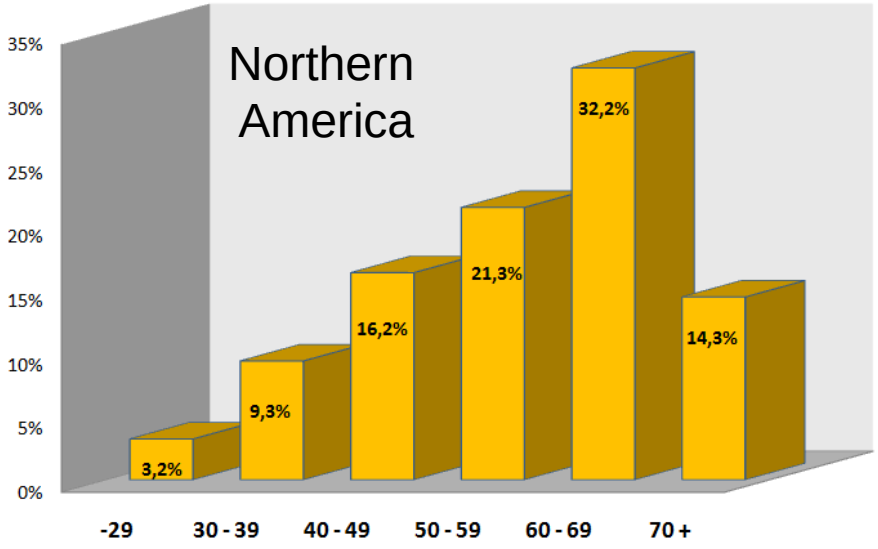


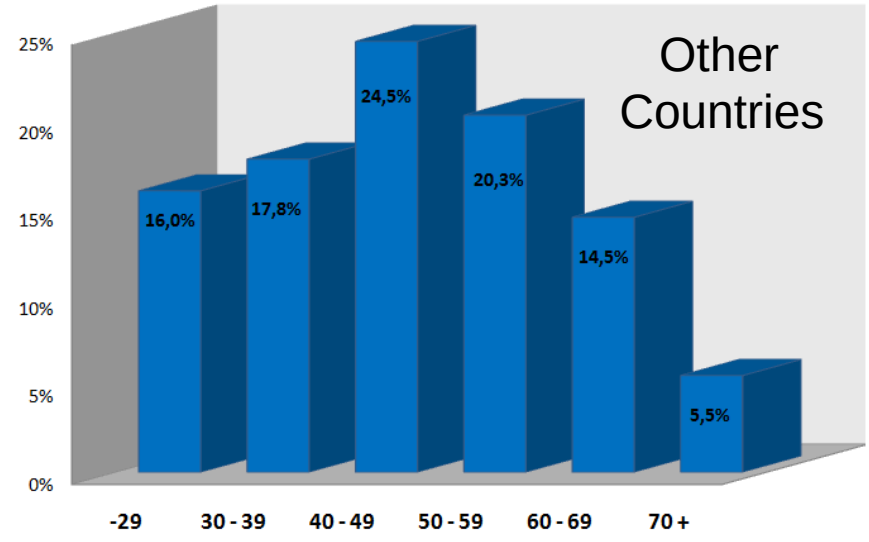
The reader group under 29 years of age is as large as the over-60's.

2. Personal Information - Age Distribution by Region



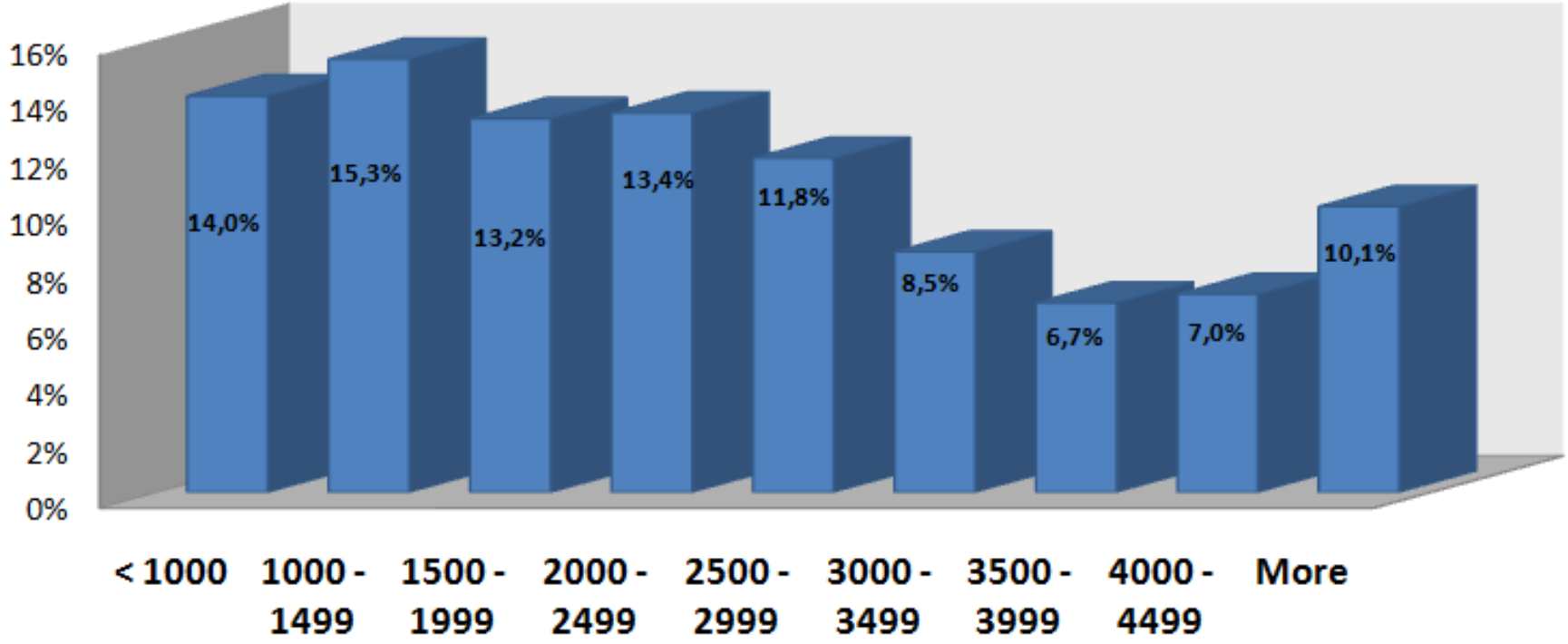






2. Personal Information – Income Consumers

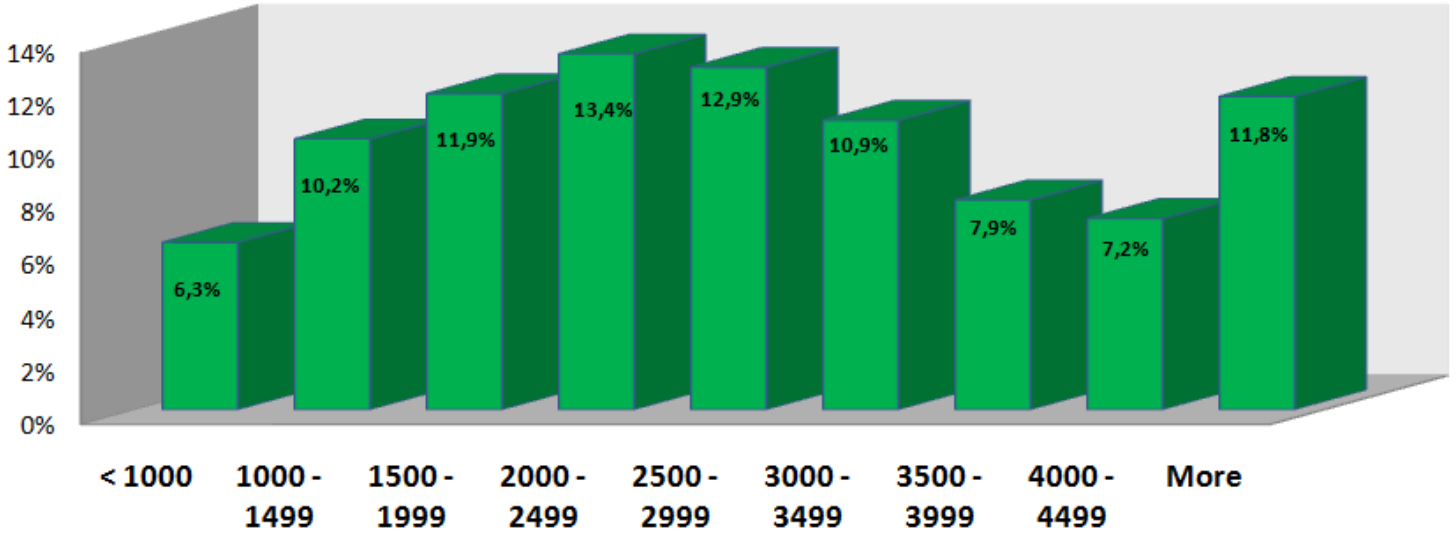
Net monthly household income* 2011 in Euros



44 % of the households have an income above 2 500 Euros

*China: individual income

2. Personal Information - Income Consumers by Regions I

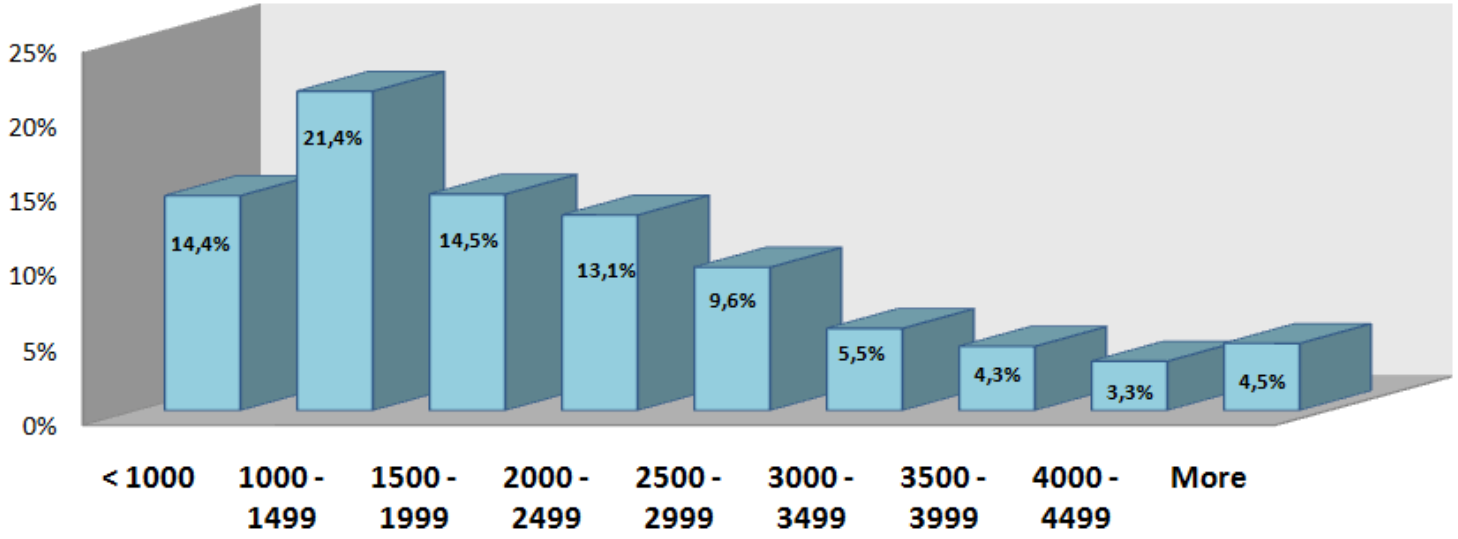


Central Europe

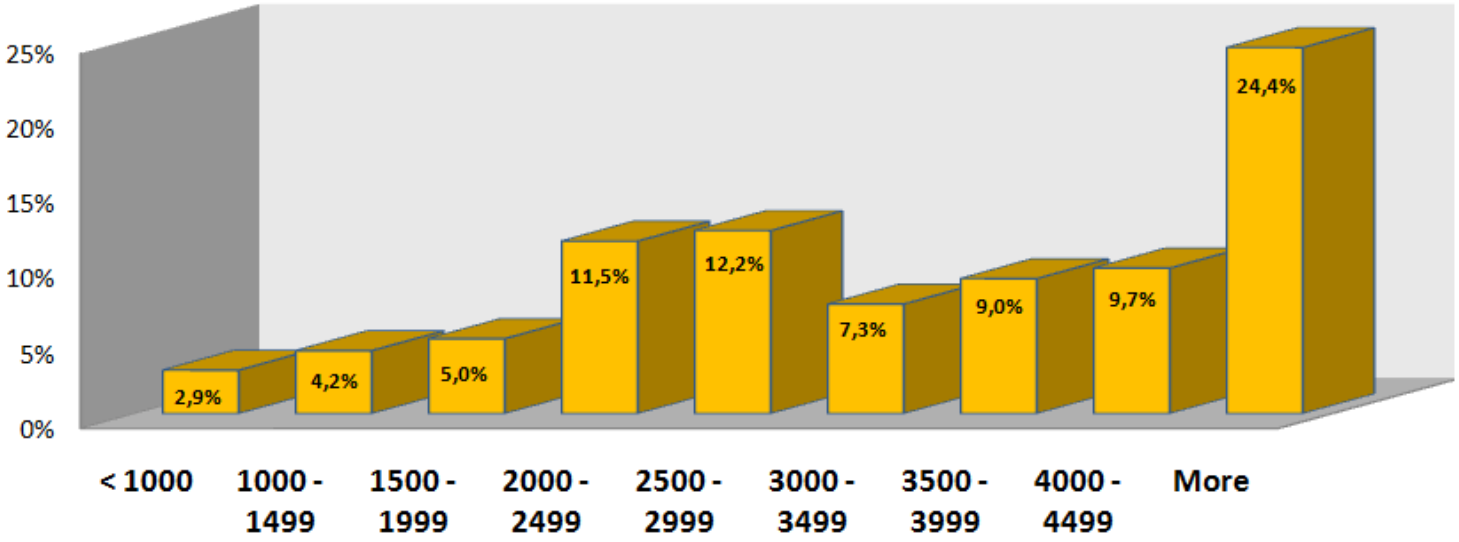
n/a: 7.5%

Southern Europe

n/a: 9.4%



2. Personal Information - Income Consumers by Regions II

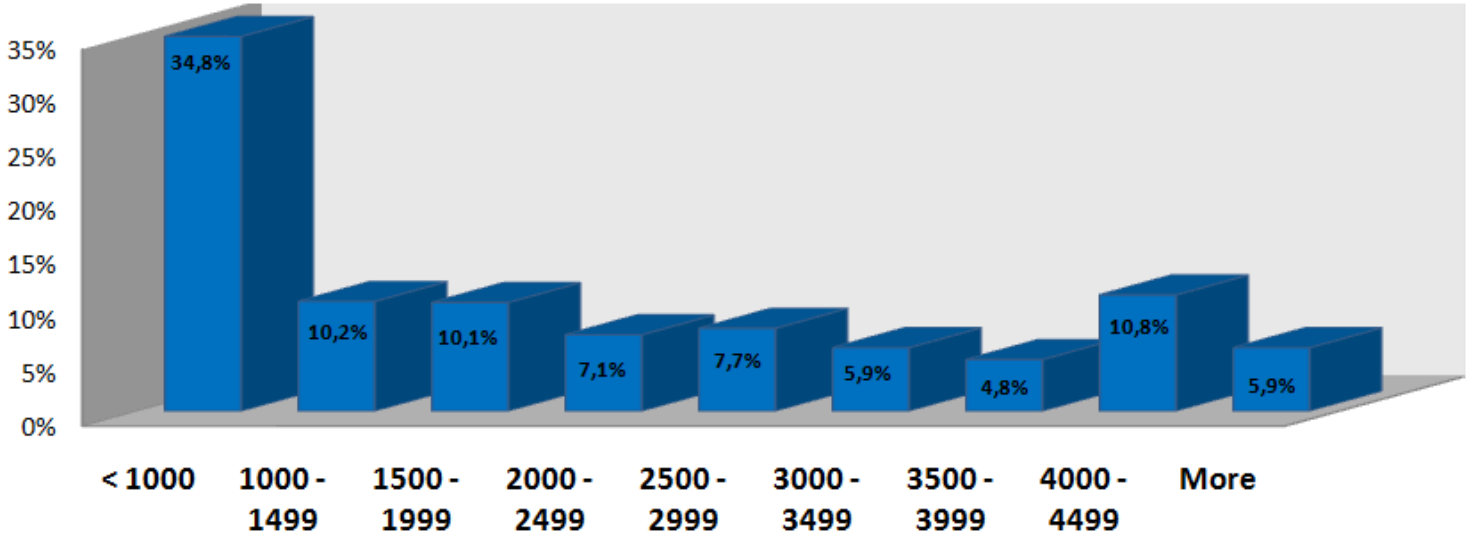


Northern America

n/a: 14,1 %

Other Countries

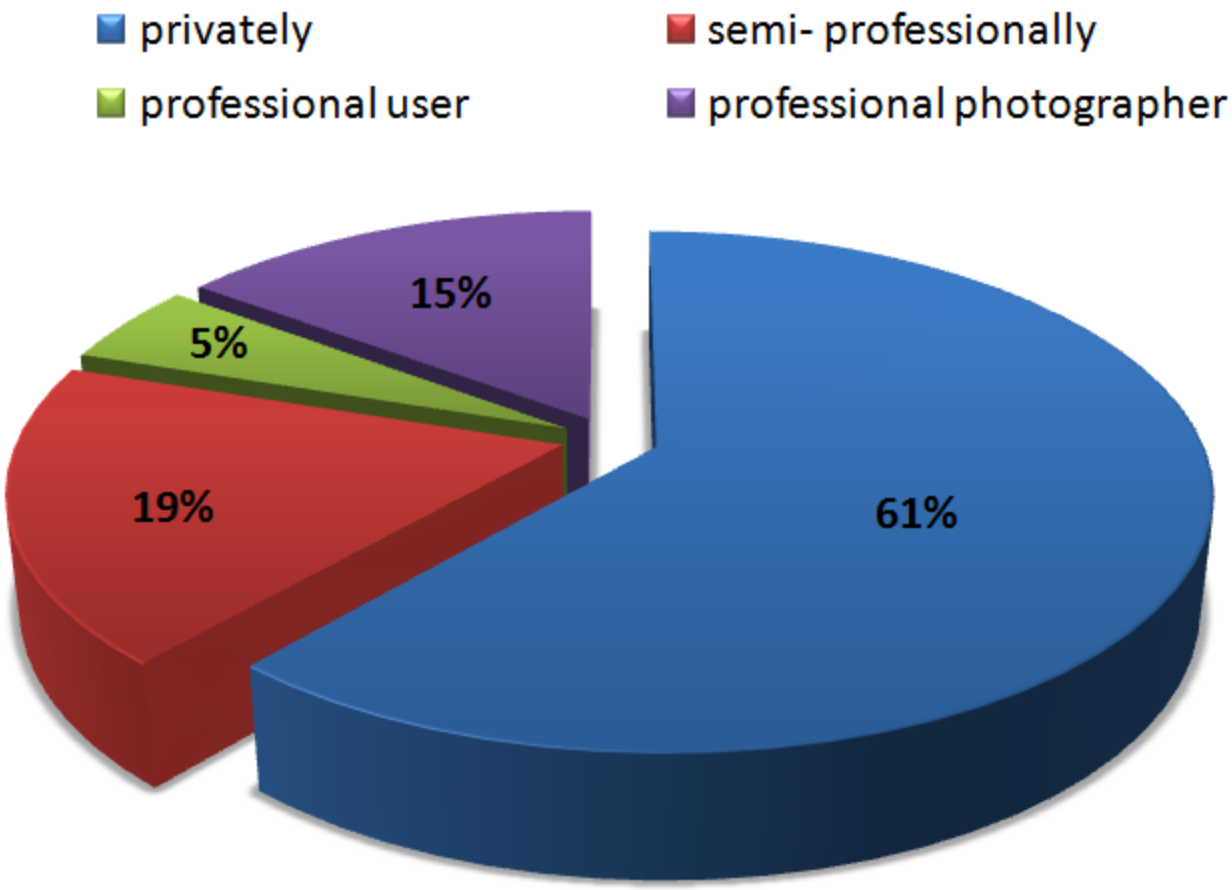
n/a: 2,7%



3. Photography Practice: Overall Results

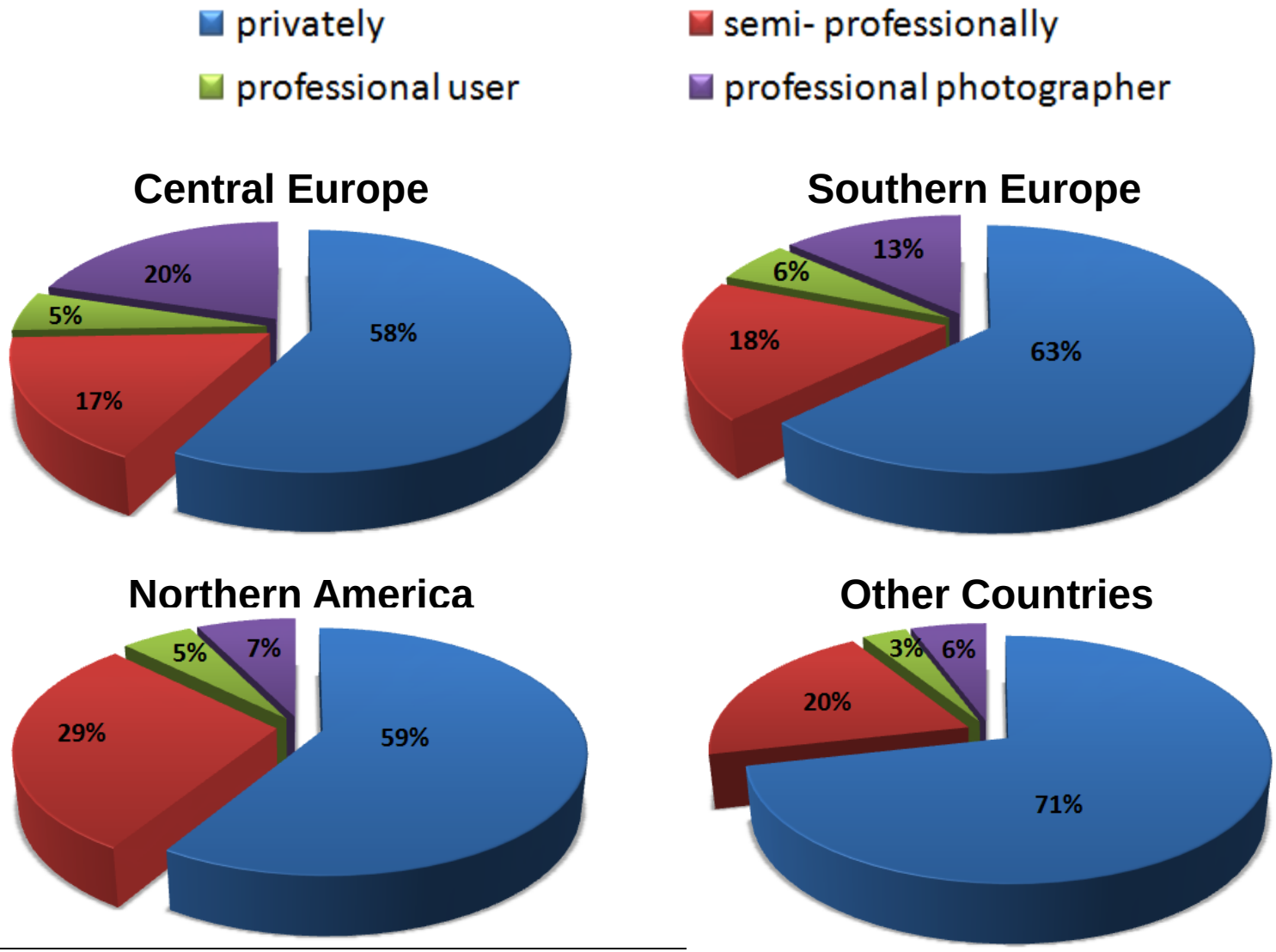
- 61 per cent of the respondents in the survey take photos privately.
- 64 per cent of the readers generate their pictures often in a RAW file format.
- The average reader takes 595 photographs a month. Around 61 photographs he prints out himself. Monthly he orders around 72 prints from a shop.
- Nearly every second reader creates printed photobooks. Each of these readers in average creates per year 4.8 printed photobooks.
- 24 per cent of the readers often use free photo communities to present photographs. Likewise 24 per cent often use other internet sites.
- Every fifth reader frequently uses the video 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...”

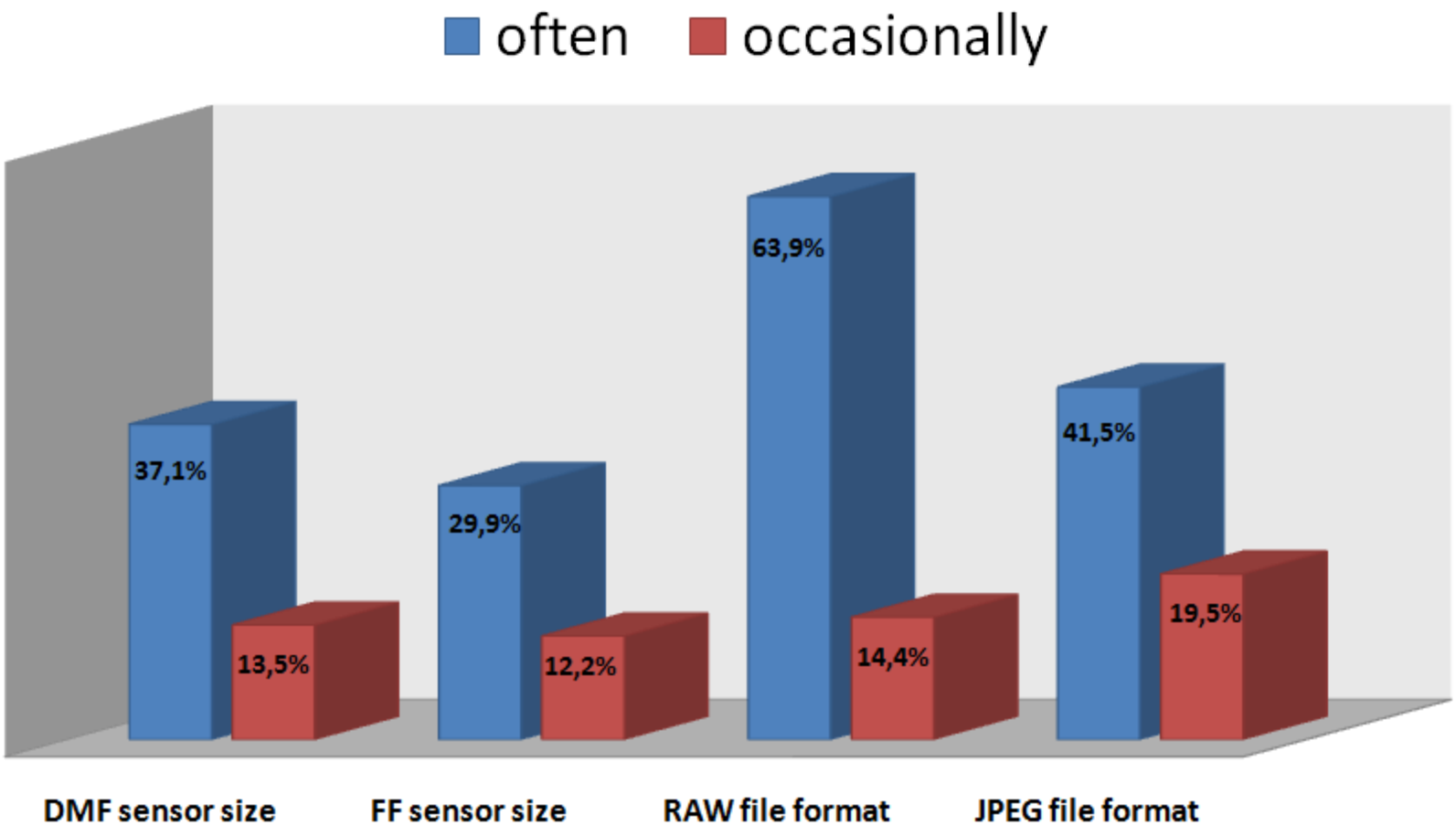


The majority of readers take photos privately.

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



3. Photography Practice: “My photos are generated in ...”



Note: More than one answer was possible

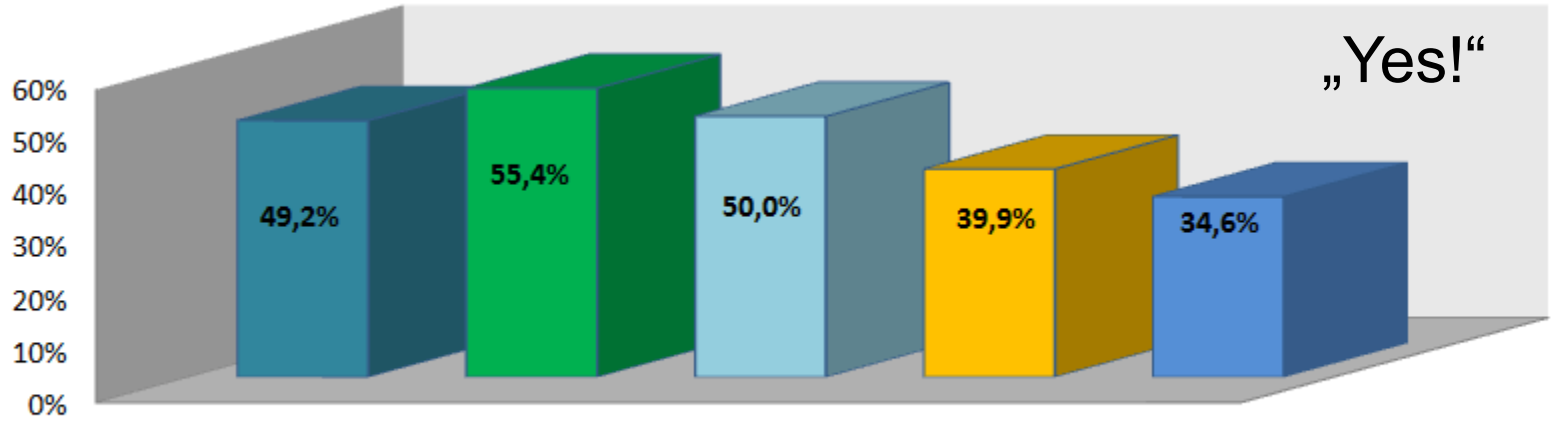
3. Photography Practice: photos/prints

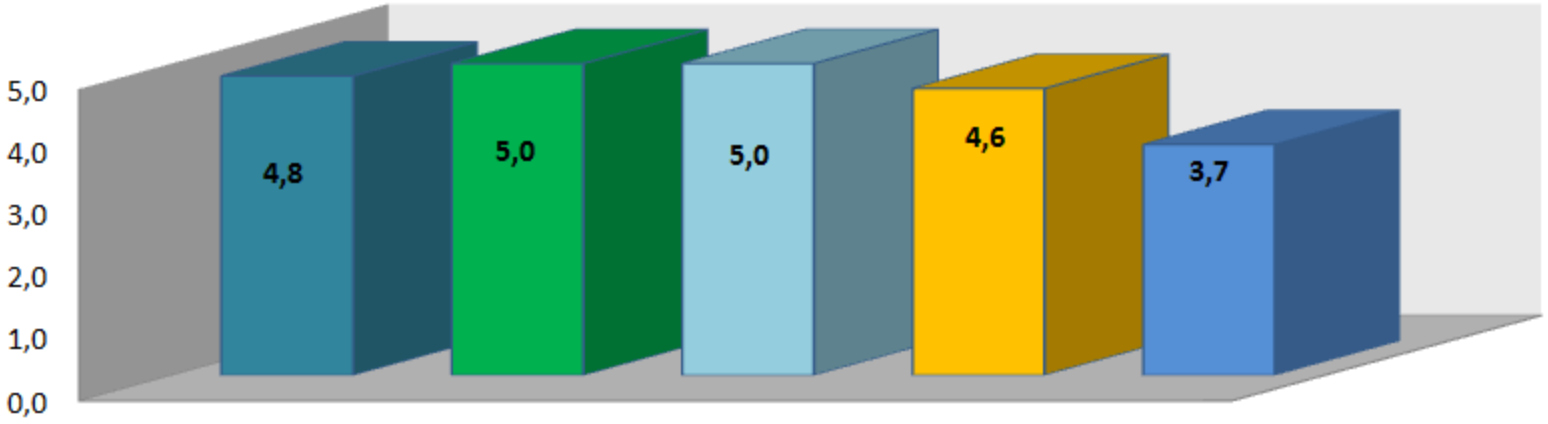
	(*mean*)	(*median*)	
"I take ... photos per month"	595	264	photos
"I print out myself"	61	16	prints
... of prints larger than half magazine page	26	7	
"I order as pictures from a laboratory"	72	17	prints
... of prints larger than half magazine page	25	5	

For this purpose on average **the readers use 1.9 cameras**.

There is a wide range of answers, beginning with 2 photographs up to 10 000.

3. Photography Practice: “Per year I create ... printed photo-books”

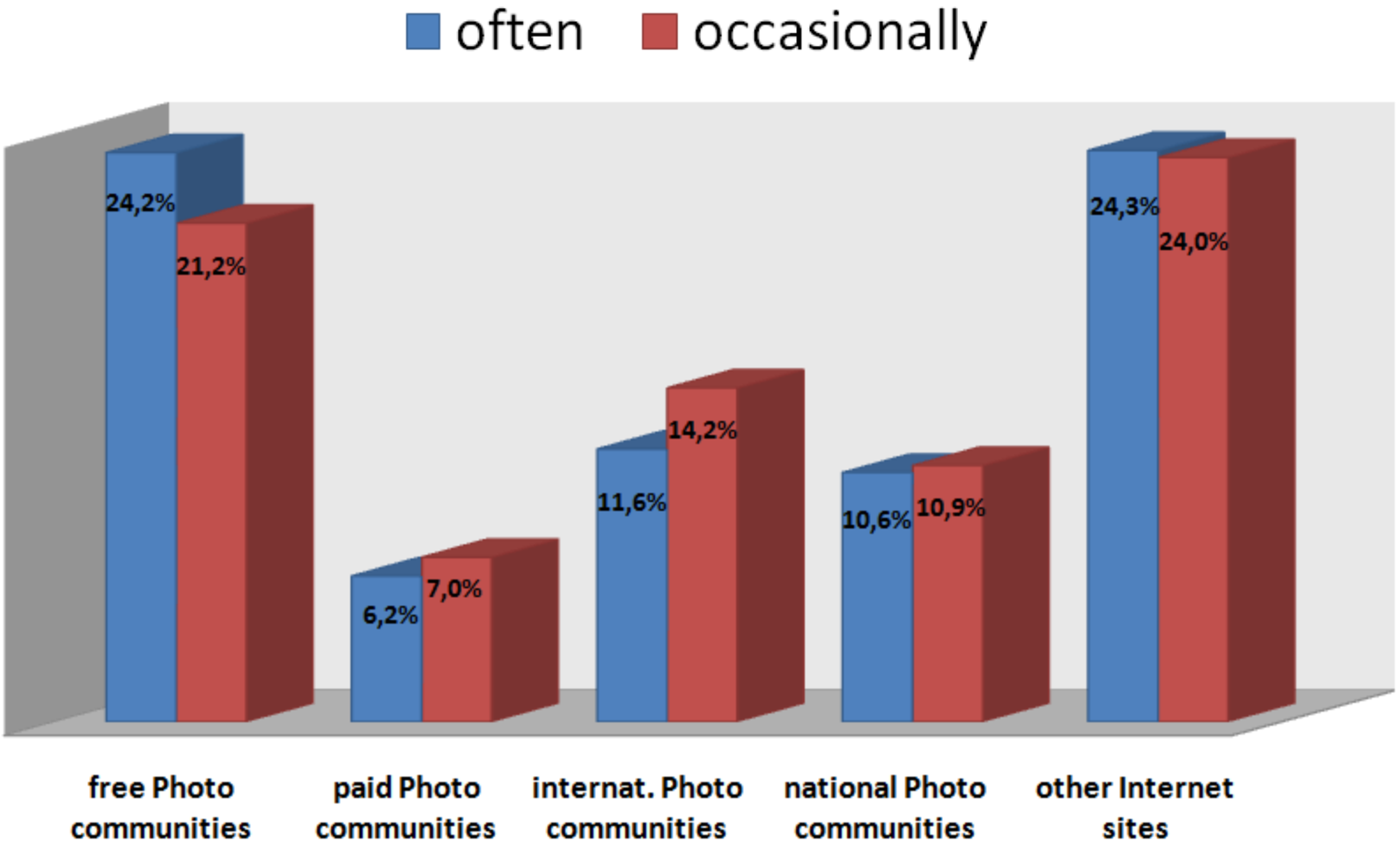




books per year

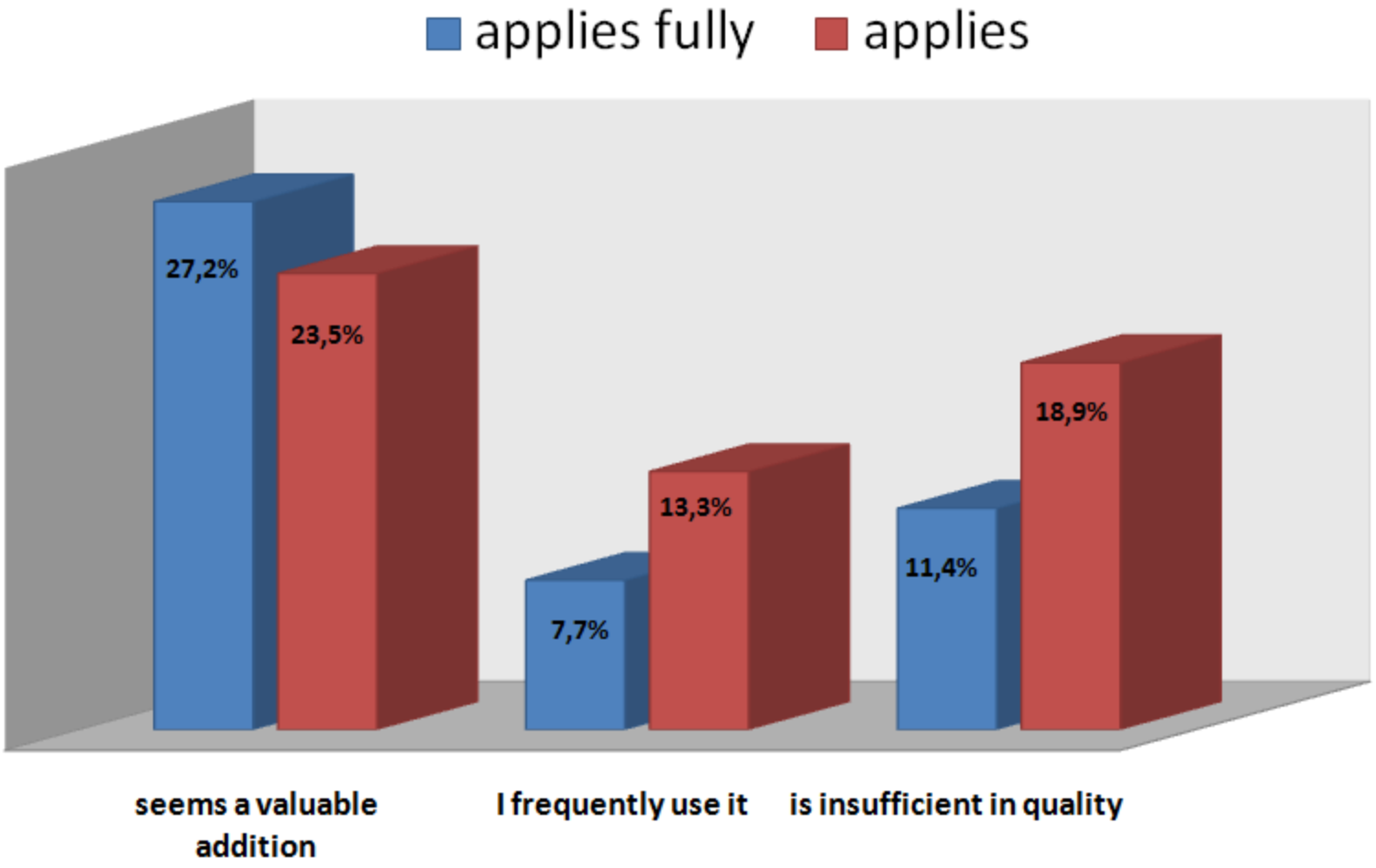
Mean / Base: persons who create one or more photo-books

3. Photography Practice: “To present my photographs, I use...”



Note: More than one answer was possible

3. Photography Practice: “The video function ...”



Note: More than one answer was possible

3. Photography Practice: „The following applies to me“ (I)

Statements:

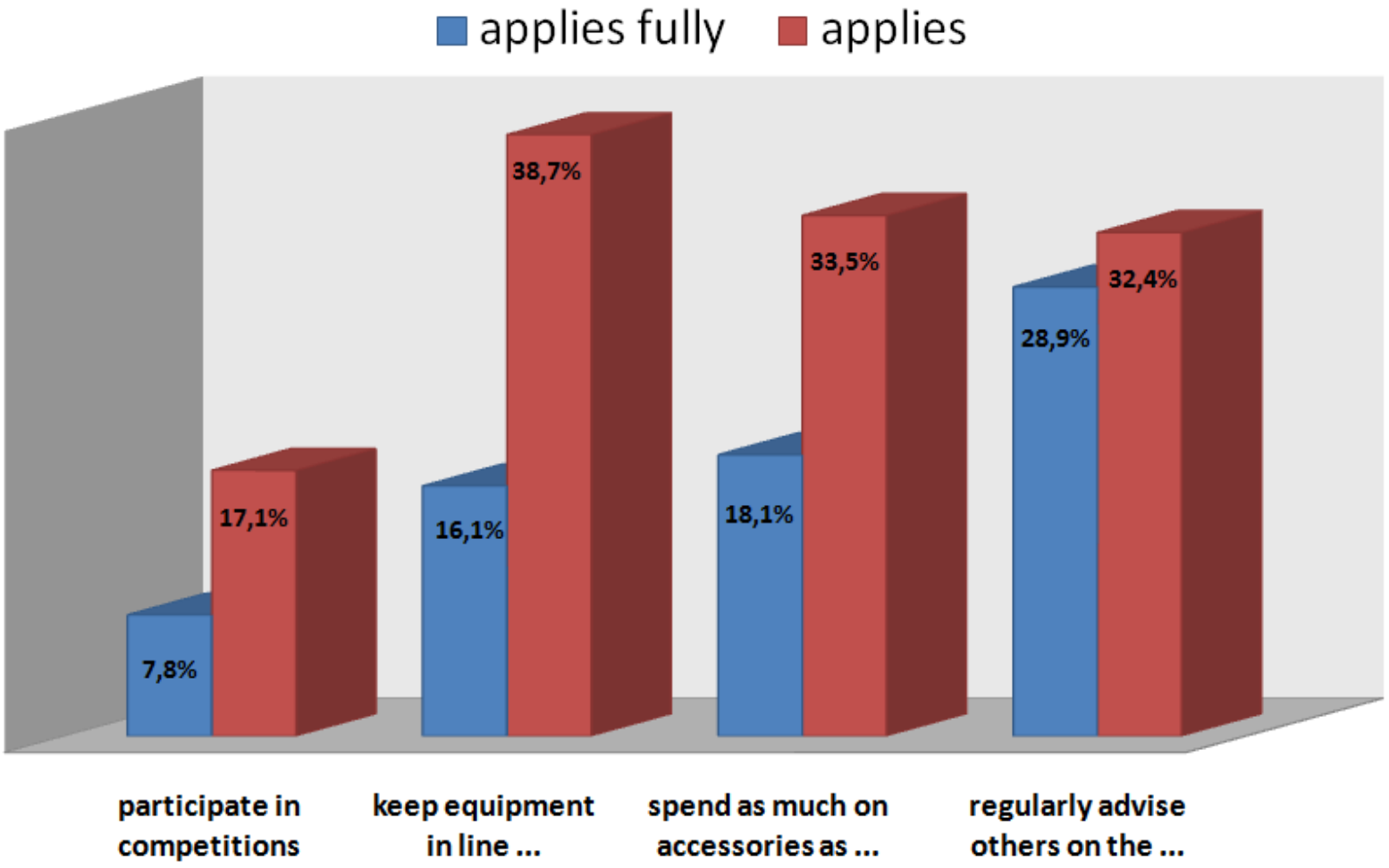
“I frequently participate in photographic competitions”

“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)

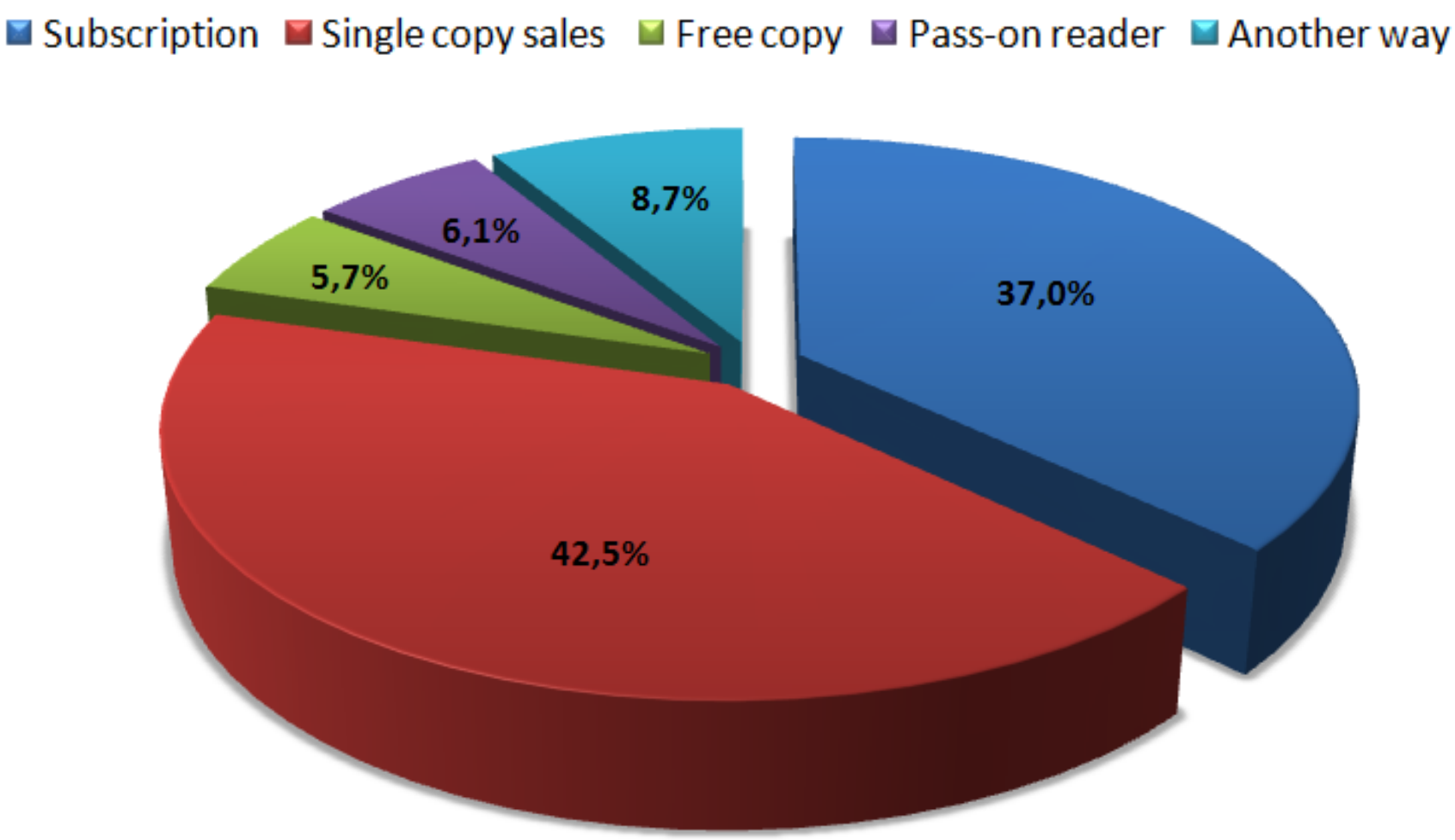


Readers as multipliers

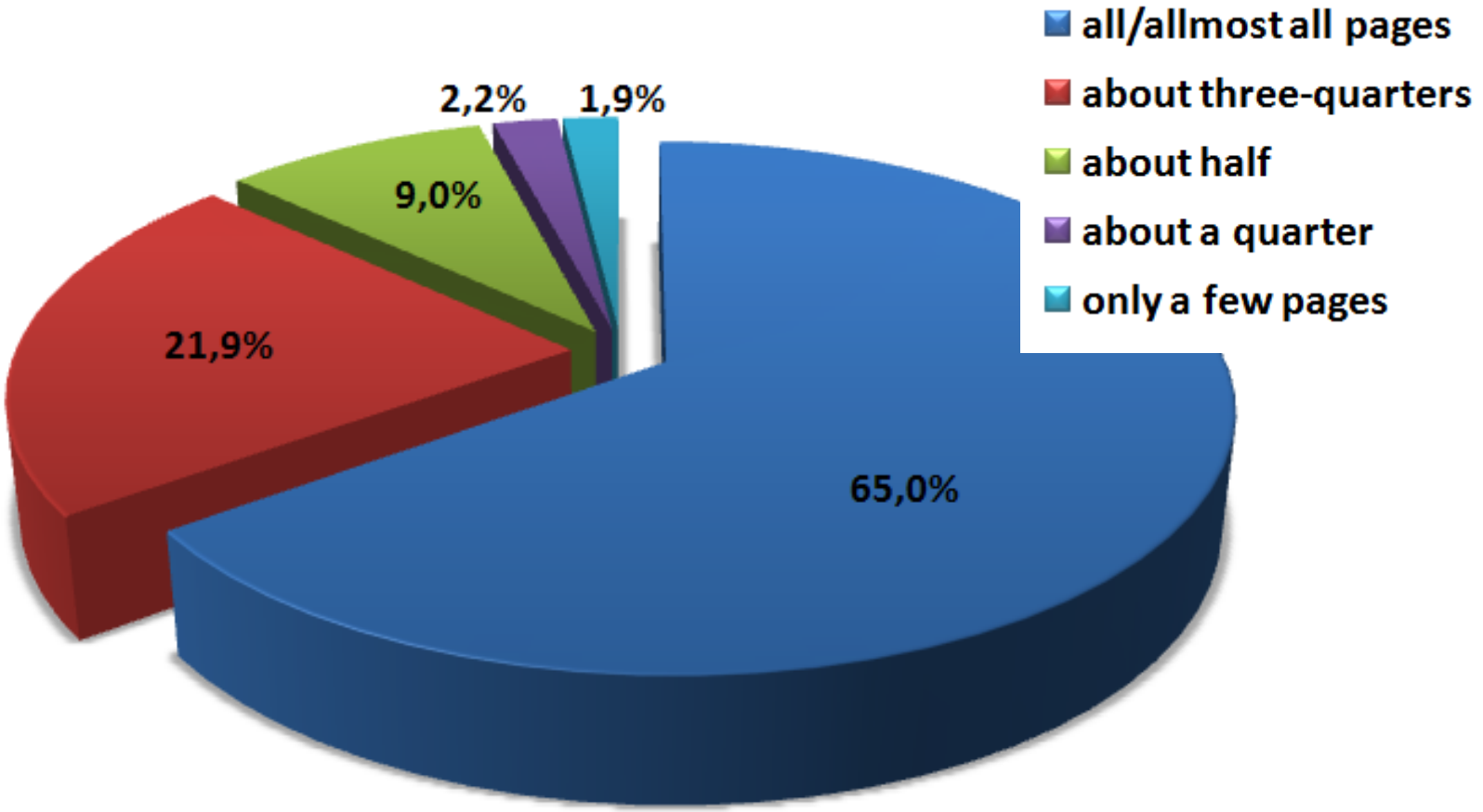
4. Reading Behaviour - Overall Results

- 42.5 per cent of the respondents in the survey were single copy buyers, 37 per cent were subscribers.
- The readers pick up their photo magazine an average of 6 times and read it for a total of 83 minutes.
  (Due to the difference in periodic variation, no distinctions were made by region.)
- Overall, all TIPA titles show an average probability of 86.5 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 63 per cent of the readers from the maximum readership.
- On average, every copy of a magazine is read by 2.5 people.

4. Reading Behaviour: Magazine Purchases



4. Reading Behaviour: “Of any one issue I normally read...”



Probability of page exposure: 86.5 % (75.4 % - 94.8 %)

4. Reading Behaviour:

Reading time: 83.2 minutes	• **Minimum mean: 29 min.** • **Maximum mean: 132 min.**
Frequency of utilisation per copy: 6.1	• **Minimum mean: 2.9** • **Maximum mean: 9.0**
Readers per copy: 2.5	• **Minimum mean: 1.6** • **Maximum mean: 5.0**
Readers of any issue: 63.3 %	• **First time reader: 8,1 %**

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”, 92 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.

- 53 per cent of respondents say they rely on photo magazines the most. A further 13 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	93.9 %
reliable and competent	91.5 %
I would miss it	84.3 %
high level of practical use	83.9 %
inspiring magazine	83.4 %
tips for buying cameras	83.2 %
makes market transparent	71.7 %
tips for selecting accessories	51.6 %

5. Attitudes to the Magazines: information sources

- After photo magazines, the internet is the second most important source of information, being used by 87 per cent of readers.
- The readers' specialist dealers and company brochures follow.
- Only every fourth 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...”

(in %)	Total	Europe	
		Central	Southern
photo magazines	93.7	95,1	89.9
internet	86.3	88.3	84.5
my specialist dealer	28.5	28.4	25.6
company brochures	28.4	31.4	25.7
trade fairs	26.1	30.1	26.0
multi-topic magazines	24.9	21.0	27.1
computer magazines	23.6	23.8	21.8

5. Attitudes to the Magazines: Information sources by region

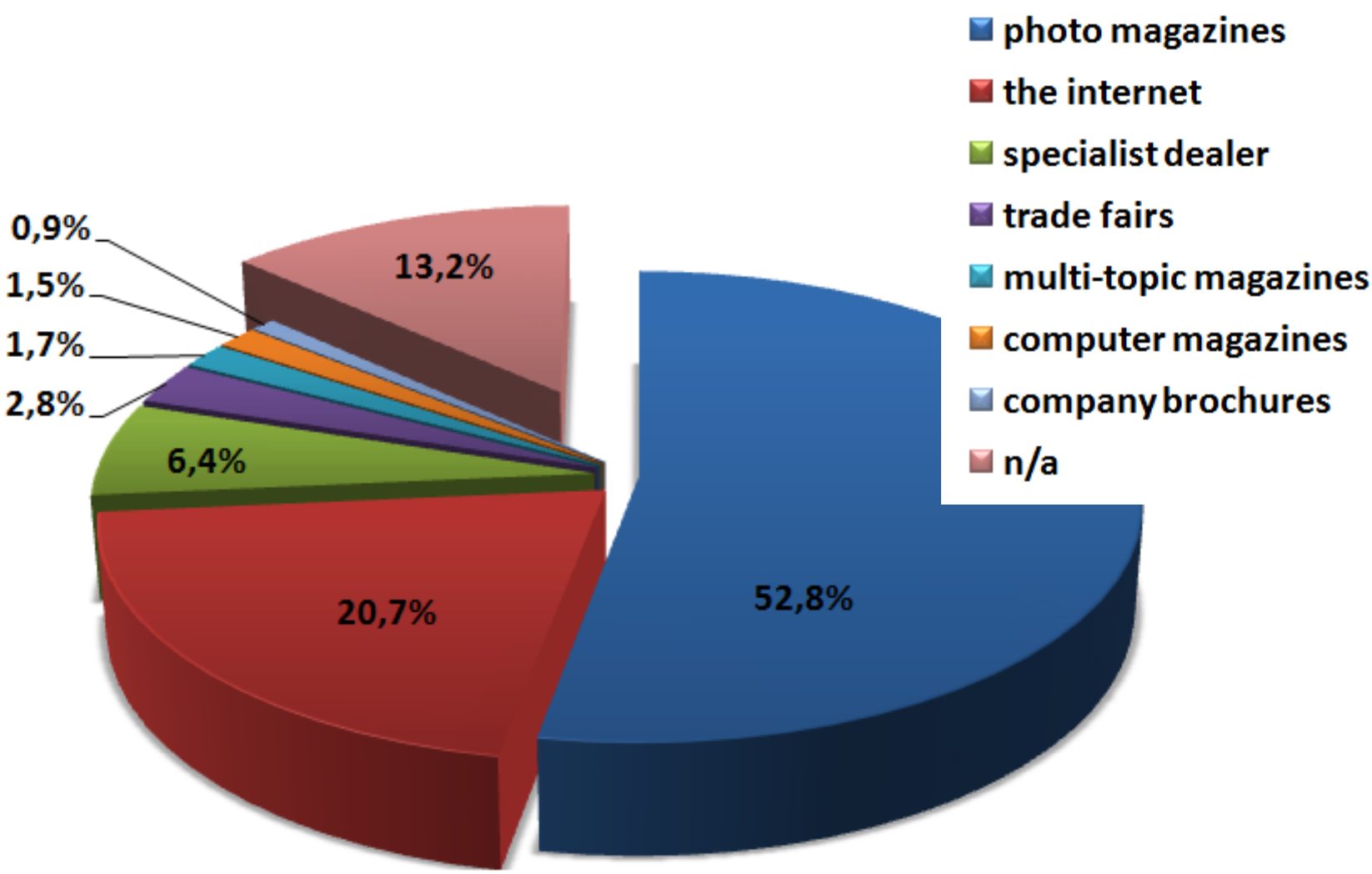
“I regularly obtain information...”

(in %)	Total	Northern America	Other Countries
photo magazines	93.7	99,4	97.1
internet	86.3	86.7	85.7
my specialist dealer	28.5	39.4	30.6
company brochures	28.4	31.4	25.4
trade fairs	26.1	21.7	17.1
multi-topic magazines	24.9	27.4	28.3
computer magazines	23.6	27.7	26.1

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

- The readers rely mostly on the photo magazines. 53 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 21 per cent of readers. The dealers follow in third place with 6 per cent of responses.
- 13 per cent of readers did not give an unambiguous answer.
- The ratings of credibility for computer magazines or multi-topic magazines are very poor (<1,7 %).

5. Attitudes to the Magazines: "I trust most in ..."



5. Attitudes to the Magazines:

“I trust most in ...”

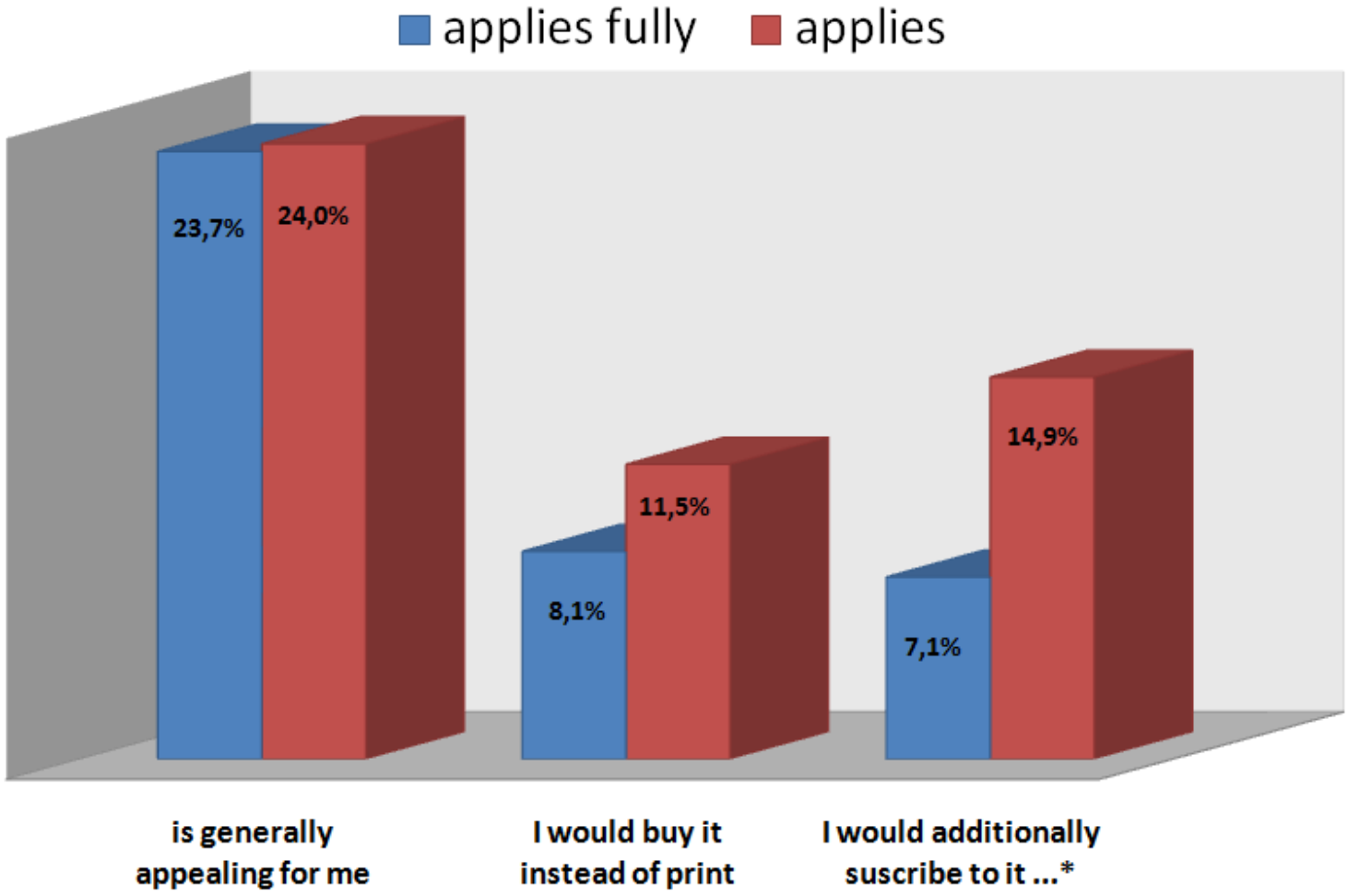
(in %)	Total	Europe	
		Central	Southern
photo magazines	52.9	58.7	42.5
internet	20.7	19.6	24.6
my specialist dealer	6.4	6.7	5.9
trade fairs	2.8	3.6	3.4
multi-topic magazines	1.7	1.0	3.0
computer magazines	1.5	0.8	2.7
company brochures	0.9	0.8	0.9
n/a	*13.2*	*8.8*	*17.0*

5. Attitudes to the Magazines:

“I trust most in ...”

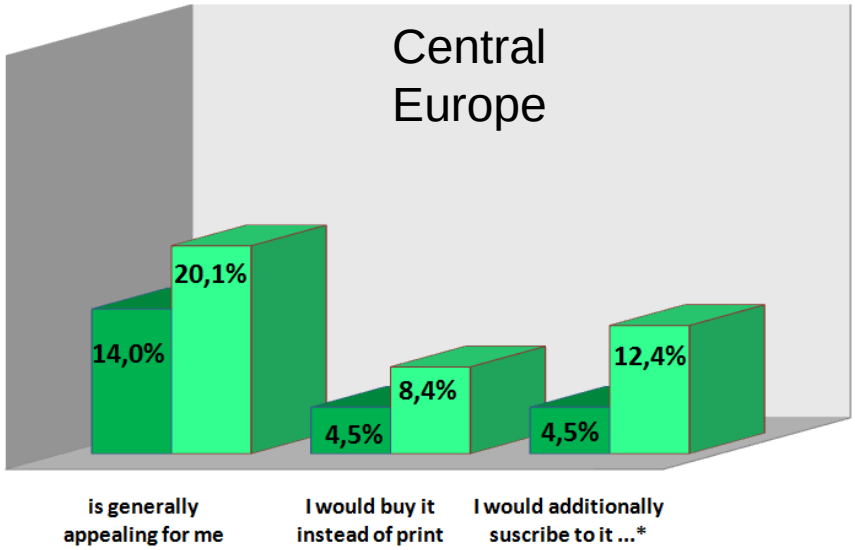
(in %)	Total	Northern America	Other Countries
photo magazines	52.9	63.0	59.6
internet	20.7	14.6	16.2
my specialist dealer	6.4	11.4	3.8
trade fairs	2.8	0.8	0.2
multi-topic magazines	1.7	0.3	0.7
computer magazines	1.5	0.8	0.3
company brochures	0.9	1.5	1.0
n/a	*13.2*	*7.8*	*18.1*

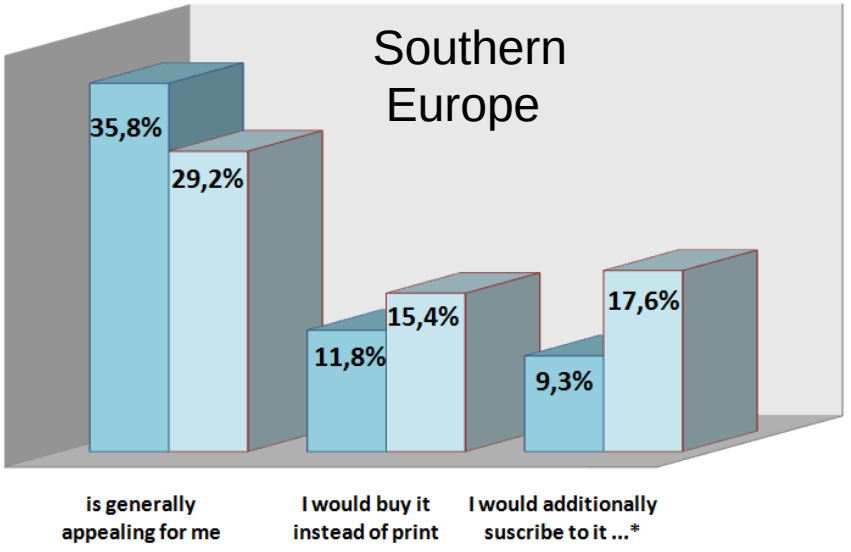
5. Attitudes to the Magazines: “An epaper version...”

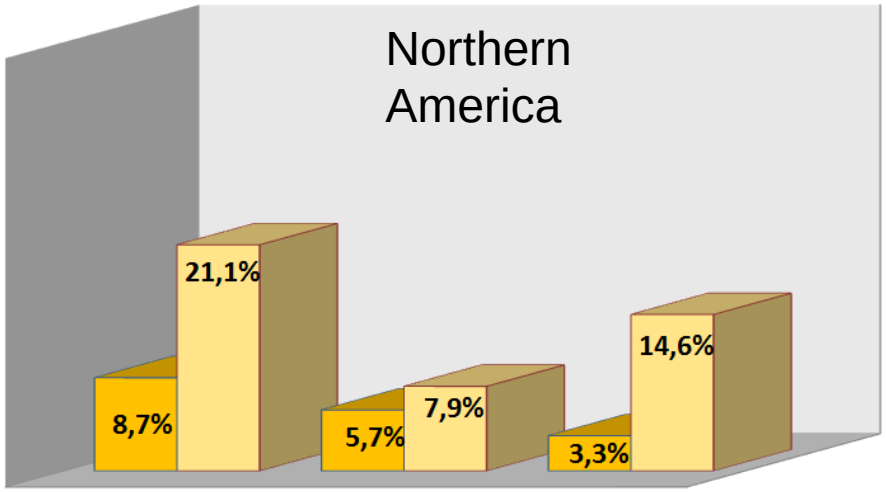


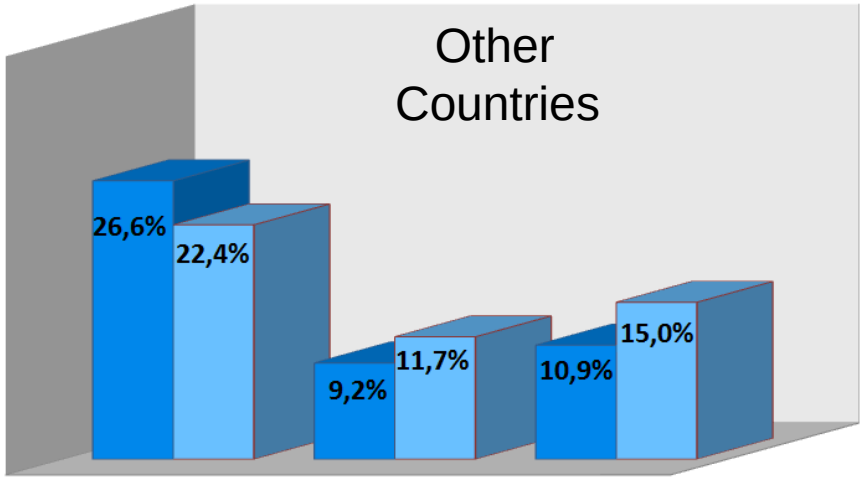
*** ... with special features at extra charge**

5. Attitudes to the Magazines: "An epaper version..." applies fully / applies









6. Attitudes to the Magazine websites: overall results

- 19 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.
- 56 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	45.8 %
to look up test reports and photos of tested products	39.4 %
to find out about dates (events, exhibitions, etc.)	30.7 %
to use other services (glossary, archive, gallery etc.)	25.6 %
to read the classified ads *[only sites with ads]*	16.3 %
to exchange views in the forum *[only sites with forum]*	11.8 %
to buy something in the shop *[only sites with shop]*	7.6 %

Note: More than one answer was possible

7. Buying Behaviour and Attention to Advertisements: Overall Results

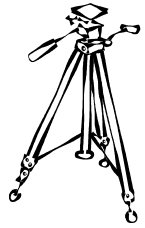
- **Interchangeable lenses** are in future the readers' top priority in purchasing intentions, followed by **accessories**.
  Digital SLR cameras follow in third place, **photo/graphics software** in fourth place.

- 82 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 (55.5 %) was prompted by an advertisement into buying a photography-related article.

7. Buying Behaviour: “I intend to buy...”

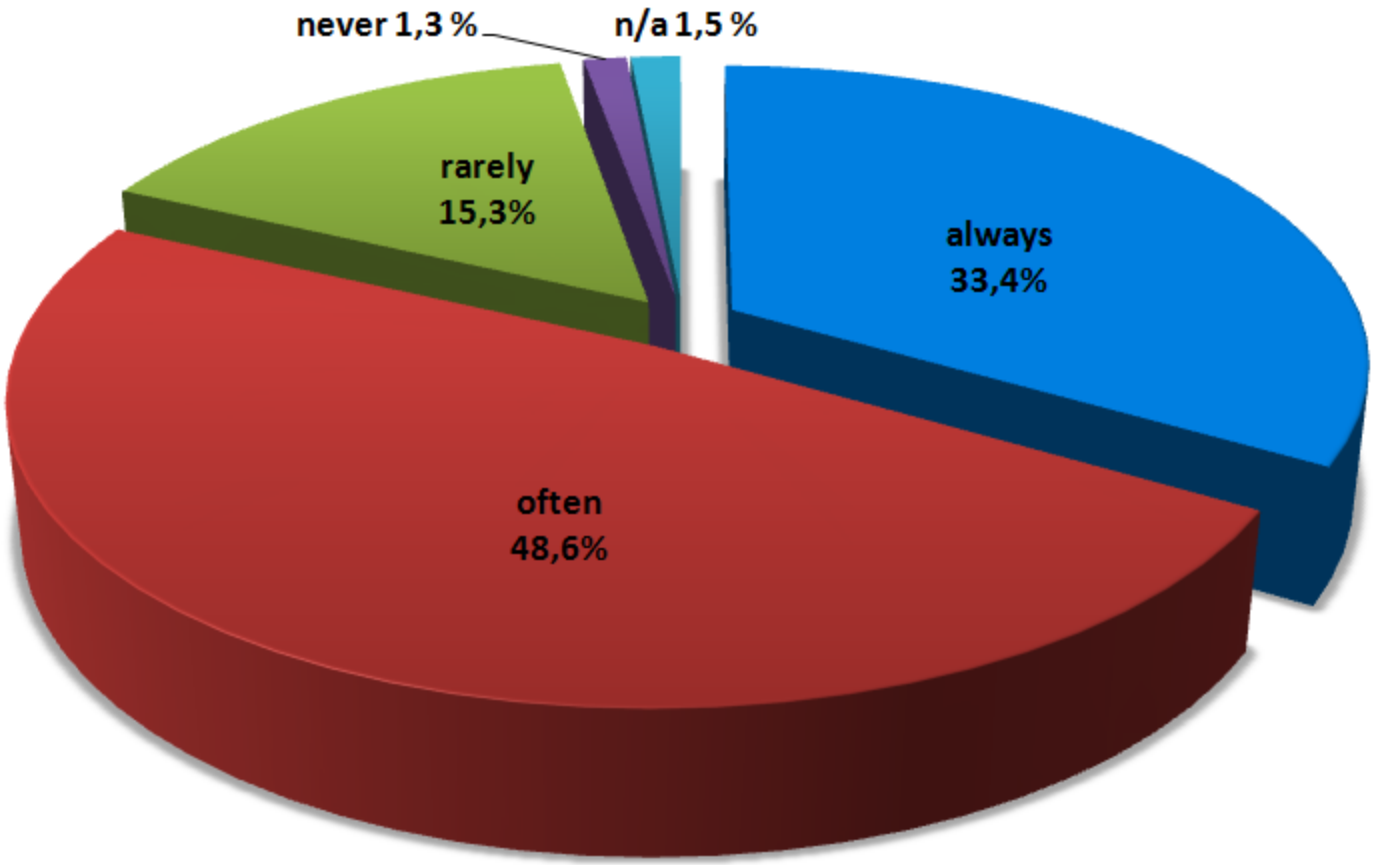
Interchangeable lenses 63 %	Accessories 52,7 %	Digital SLR photo camera 45,9 %	Photo/graphics software 29 %
Tripod 22,7 %	Studio lighting 19,7 %	Photo printer 18,1 %	Digital compact camera 12 %
Digital compact camera interchangeable 9,8 %	Scanner 9,7 %	Color Management System 9,7 %	Digital medium format system 6,9 %
	Projector 6,8 %	Digital large format system 4,1 %	

7. Attention to Advertisements:

- 33 per cent of the TIPA readers say they “always” read advertisements, 49 per cent say they “often” do so.
- Every third reader fully agrees (“completely true”) with the statement that advertisements have informational value. A further 46 per cent confirm this with “true”.
- 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.

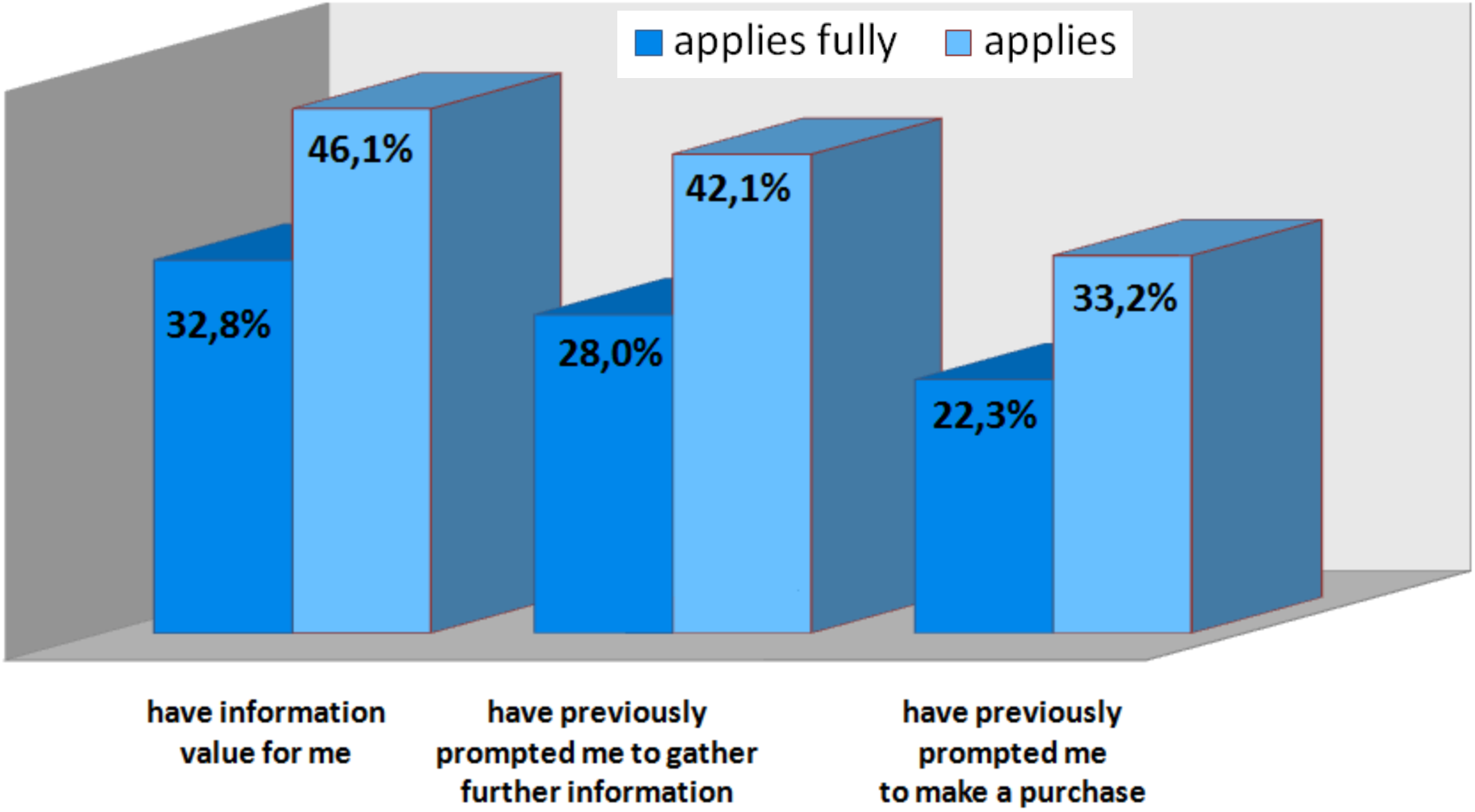
7. Attention to Advertisements:

„I read the advertisements... “

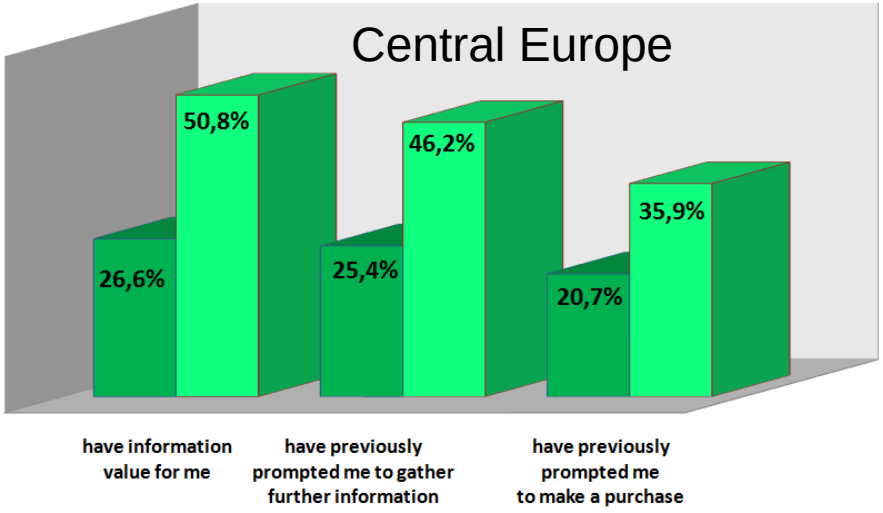


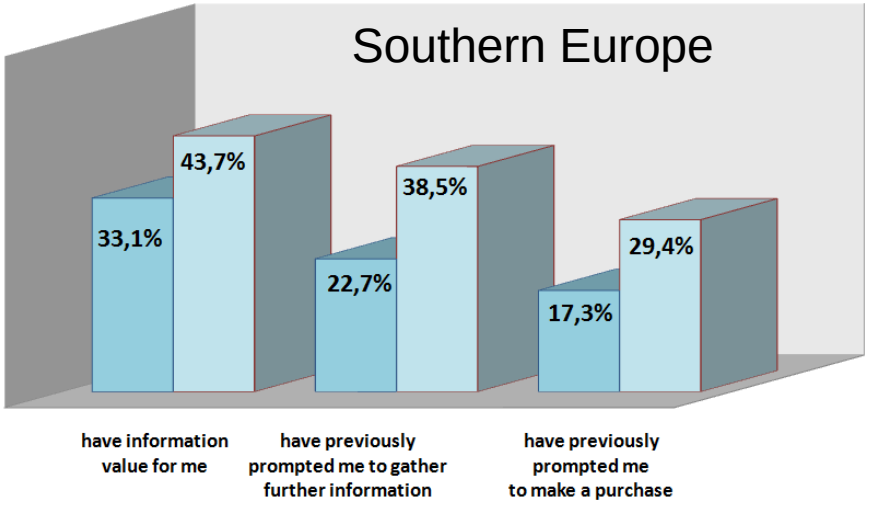
7. Attention to Advertisements:

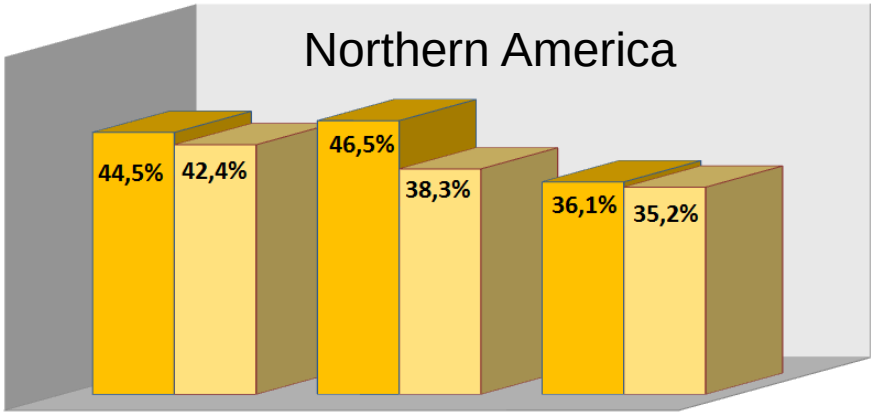
„Advertising in the magazine ... “

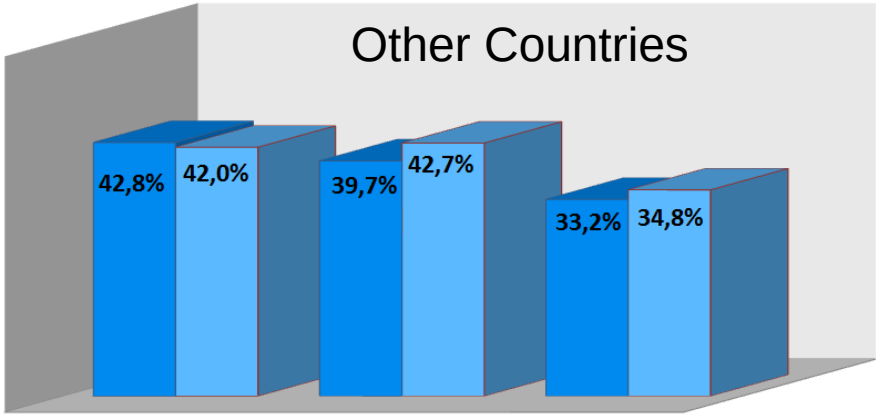


7. Attention to Advertisements: by region (applies fully / applies)









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