Readership Survey 2017
- 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 the readers of the TIPA-magazines.

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

For 21 magazines an online-survey with identical questionnaire was published on https://presseforschung.de.

1. Skeleton Data
Synopsis

Coordinated readership survey with self-administered questionnaires. Parallel online-survey for 21 magazines.

Duration: October 31th 2016 – February 04th 2017

Participants: 23 magazines from 13 countries

Total returns N = 6 821
Analysed returns: Na = 6 767

Returns by mail: 28.4 %
Returns by fax: 1.9 %
Returns online: 69.7 %

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

1. Skeleton Data
Method

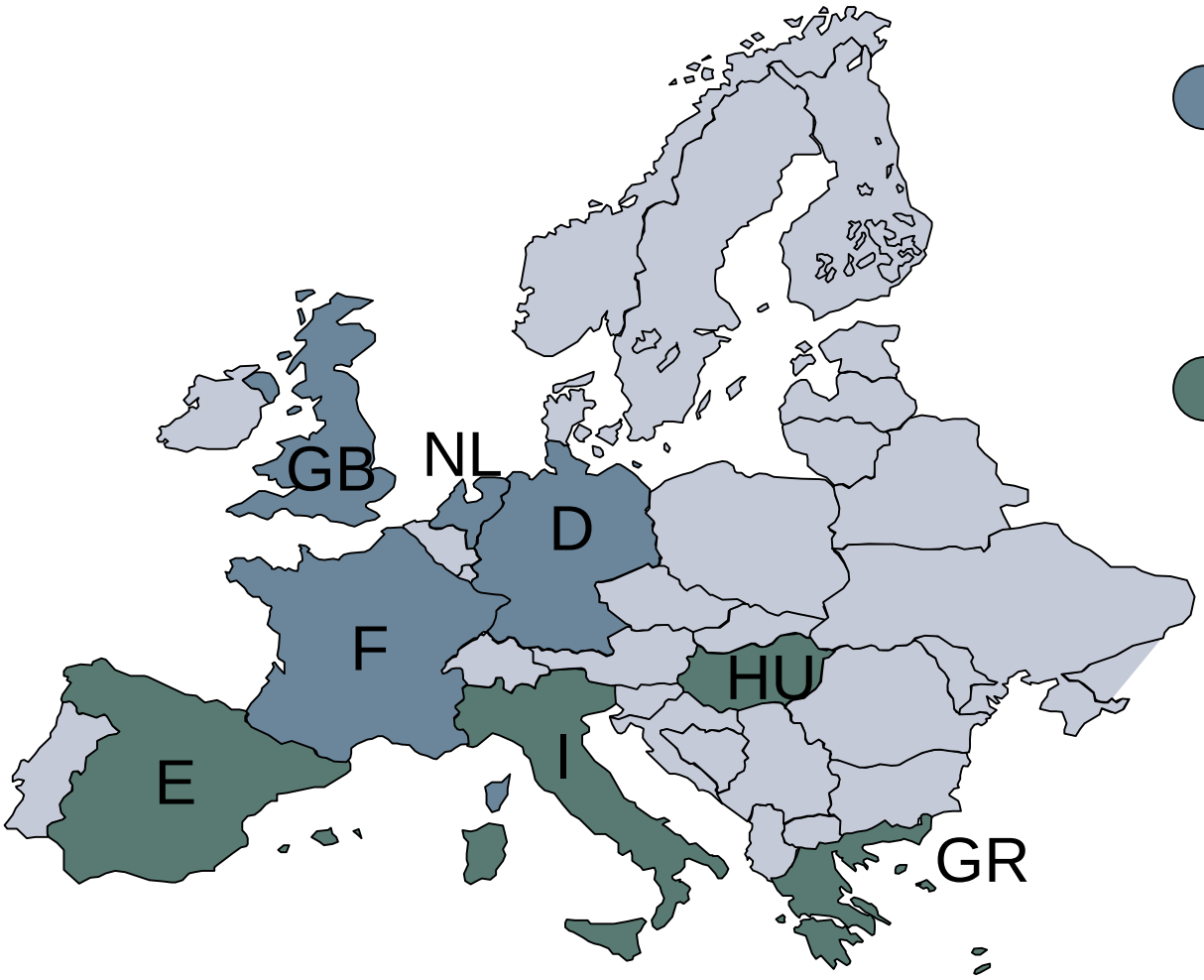
The returns for each magazine were recorded separately. On average, each magazine achieved a return rate of 295 questionnaires.

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

- Central Europe
  France, Netherlands, Great Britain, Germany
- Southern Europe
  Greece, Hungary, Italy, Spain,
- Northern America
  Canada, USA
- Other Countries
  Australia, Brazil, India

1. Skeleton Data
The Magazines

1. Skeleton Data
Magazines by Regions



Central Europe
4 Countries
11 Magazines

Southern Europe
4 Countries
5 Magazines

1. Skeleton Data
Magazines by Regions

Northern America

2 Countries

4 Magazines

1. Skeleton Data
Magazines by Regions

Other Countries

3 Countries

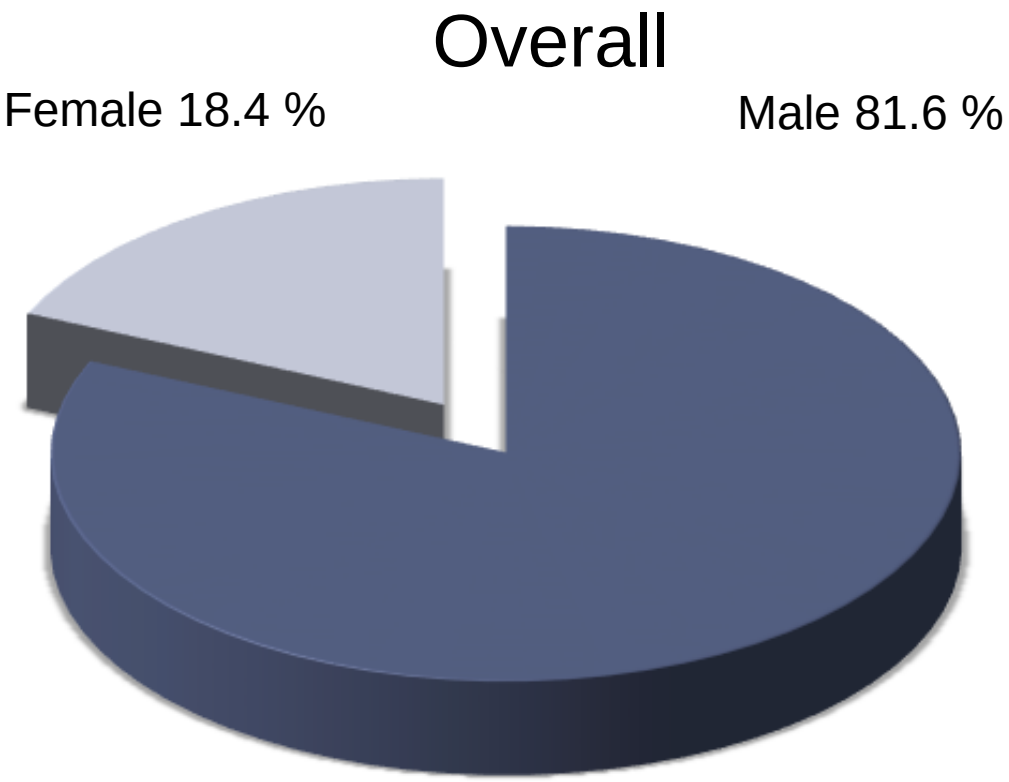
3 Magazines

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 sixth reader is female.
- The average reader is 49.3 years old. On average, the women are younger than the men (42.6 to 50.7 years). 46 percent of the readers are younger than 50 years of age.
- 62.8 percent of the readers reported a net monthly household income which is more than the OECD-Mean of their country. 39.7 percent of the readers reported more than 150 percent, 20.6 percent of the readers reported more than 200 percent of the OECD-Mean.

2. Personal Information
Sex



2. Personal Information
Readership by Gender in Each Region

Central Europe

Male 85.9 percent
Female 14.1 percent

Southern Europe

Male 74.1 percent
Female 25.9 percent

Northern America

Male 83.2 percent
Female 16.8 percent

Other Countries

Male 75.9 percent
Female 24.1 percent

2. Personal Information
Average Age

Average Age Overall

Total	49.3 years
Male	50.7 years
Female	42.6 years

2. Personal Information
Average Age by Region

Average Age Central Europe

Total	**51.1 years**
Male	52.3 years
Female	43.2 years

Average Age Southern Europe

Total	**43.1 years**
Male	45.3 years
Female	37.6 years

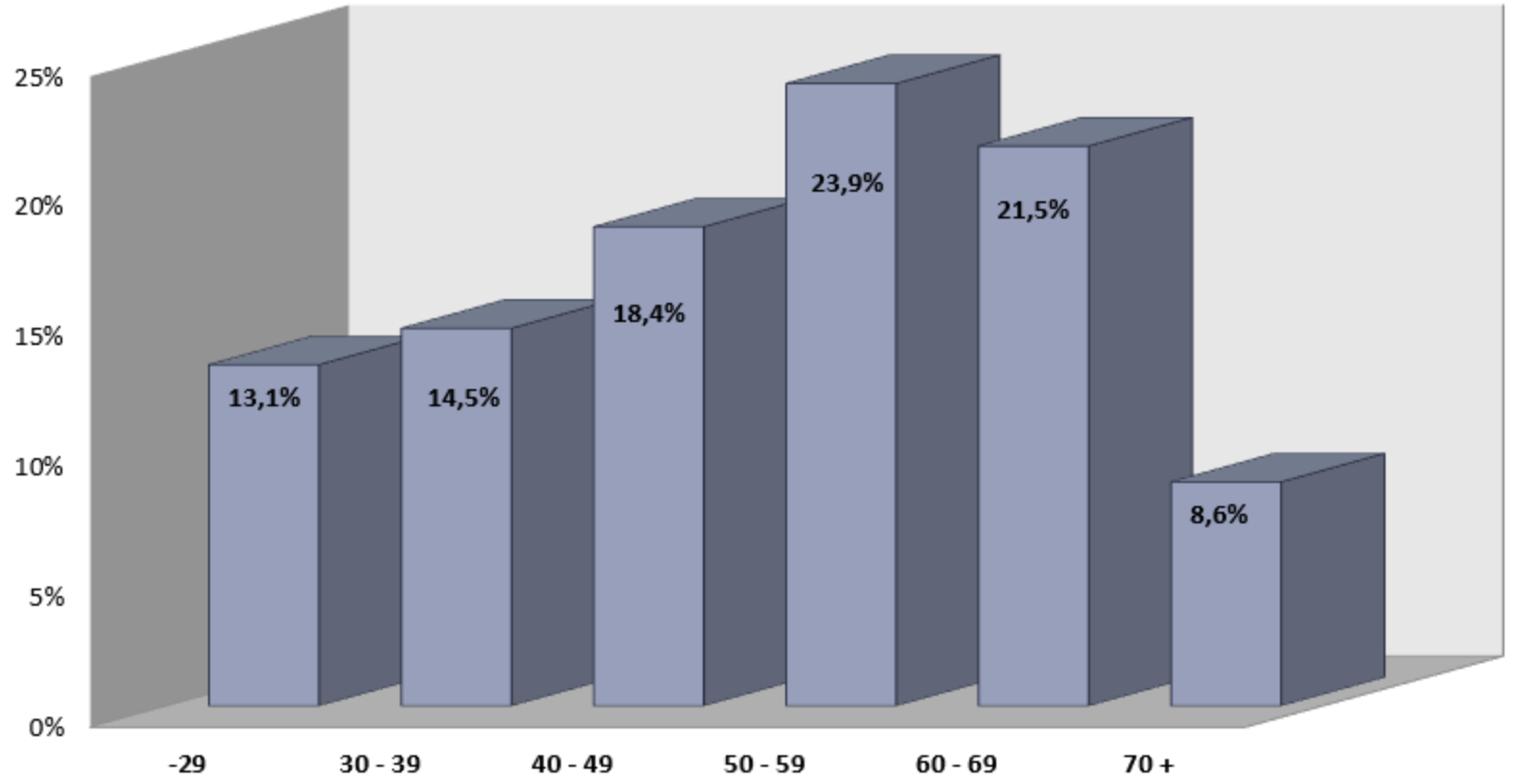
Average Age Northern America

Total	**58.9 years**
Male	60.3 years
Female	52.0 years

Average Age Other Countries

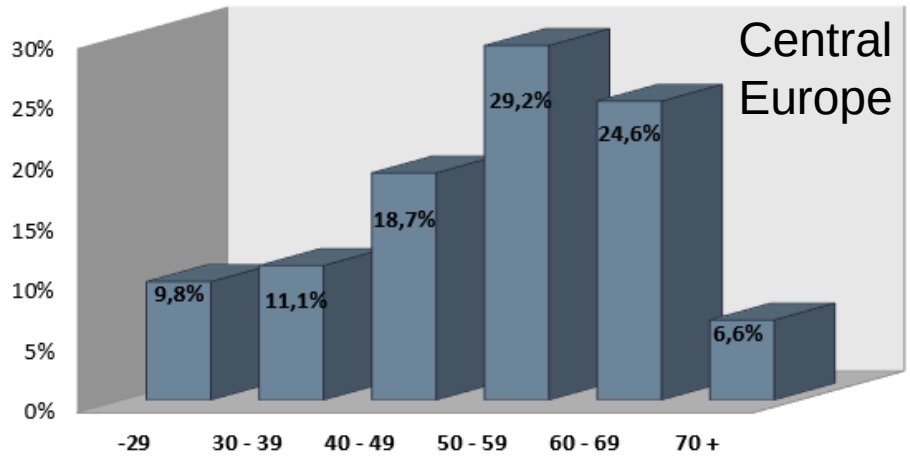
Total	**40.2 years**
Male	43.4 years
Female	36.4 years

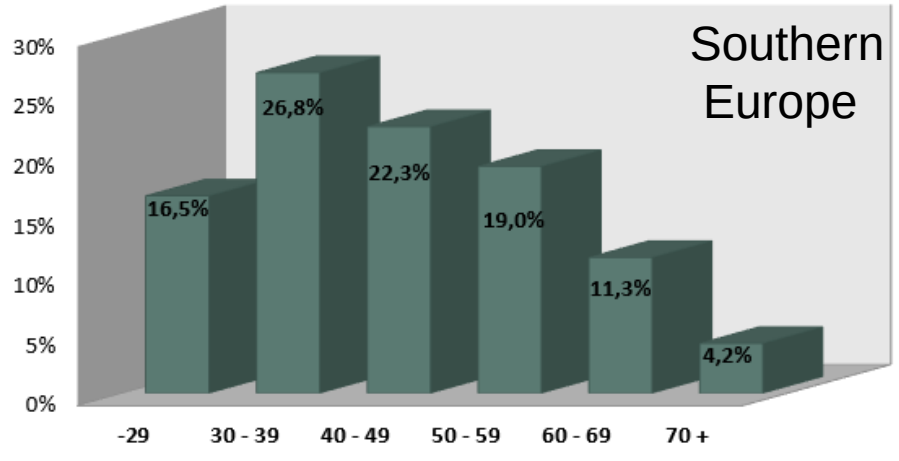
2. Personal Information
Age Distribution

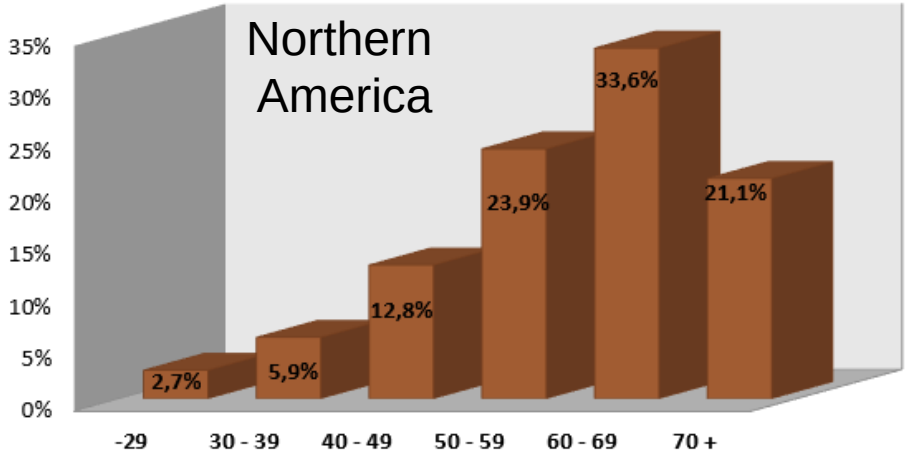


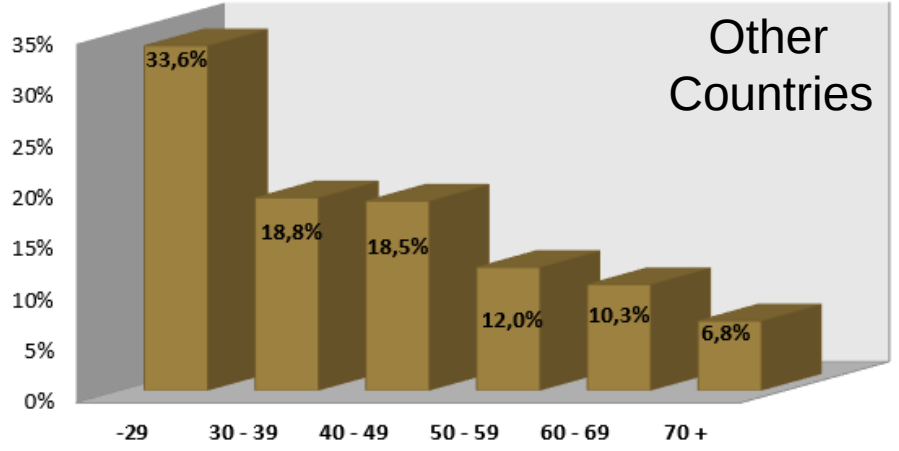
46 percent of the readers are younger than 50 years of age

2. Personal Information
Age Distribution by Region



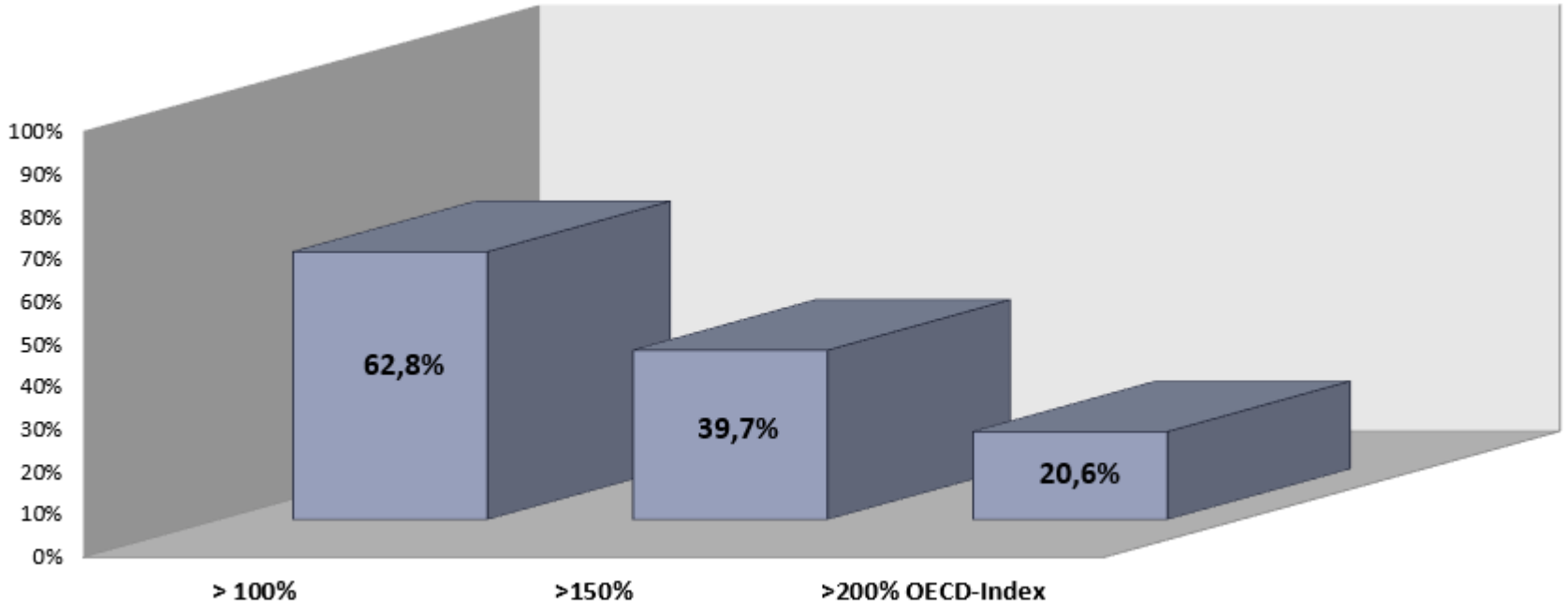






2. Personal Information
Income Amateurs

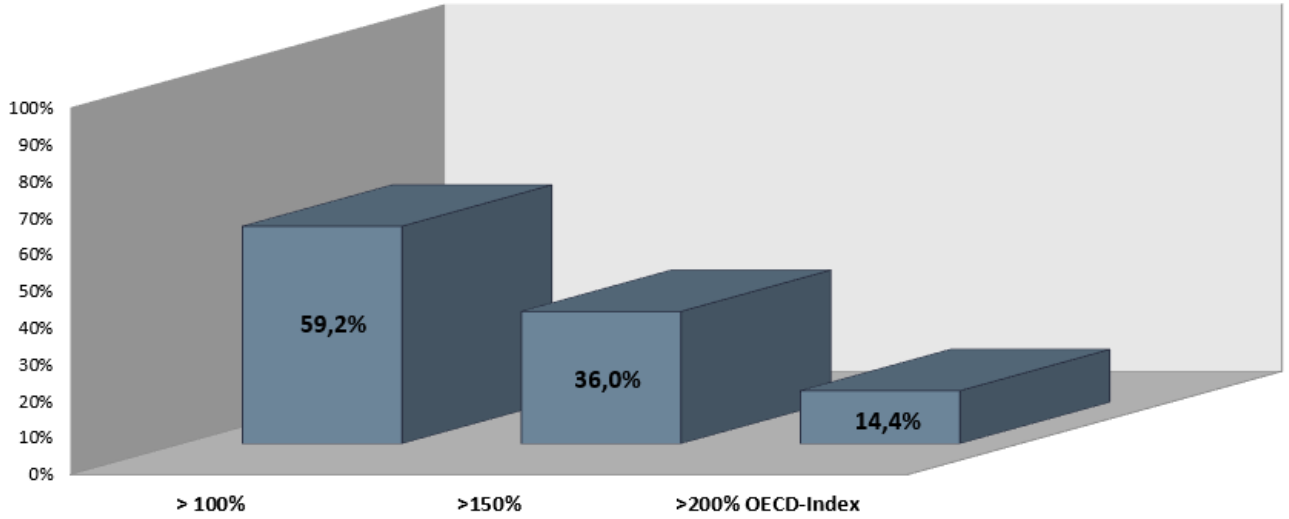
Net monthly household income 2016/17 – according to OECD-Index 2016



20.6 % of the households have an income above 200 percent higher than the average income in their country according to the OECD Better-Life-Index 2016

(n/a: 11 %)

2. Personal Information
Income Amateurs by Regions

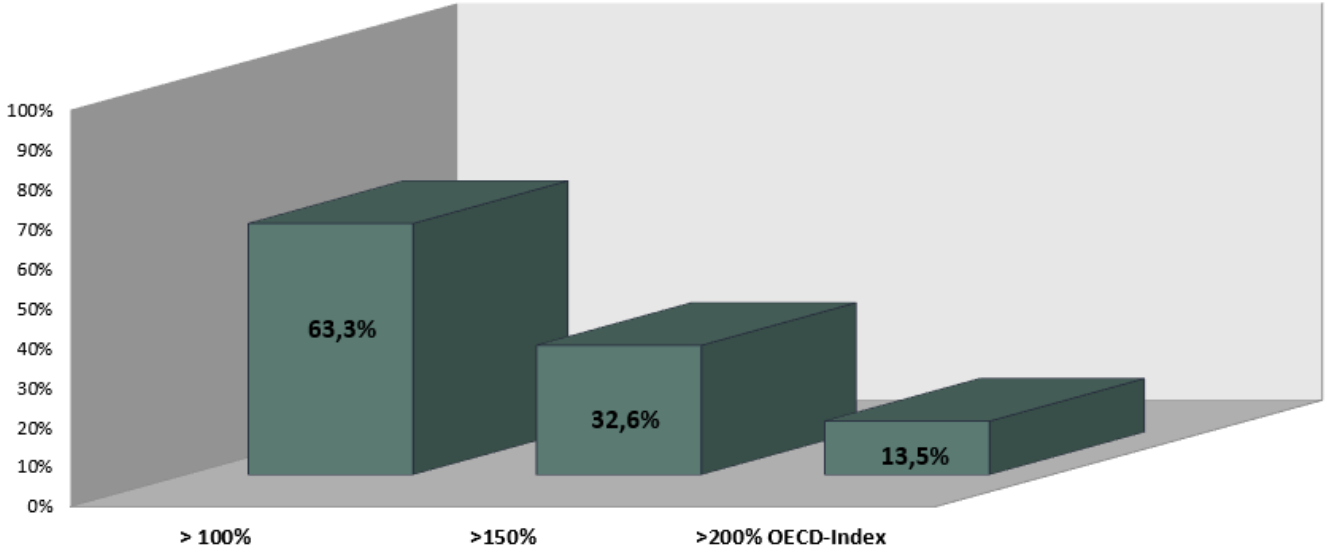


Central Europe

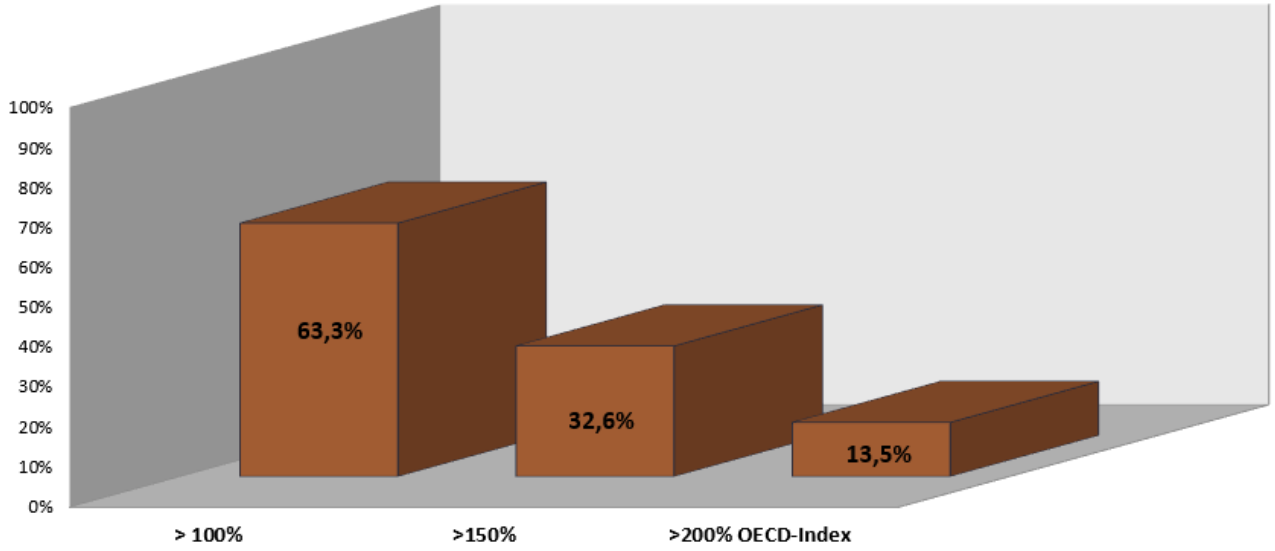
(n/a: 9.9%)

Southern Europe

(n/a: 2.2%)



2. Personal Information
Income Amateurs by Regions

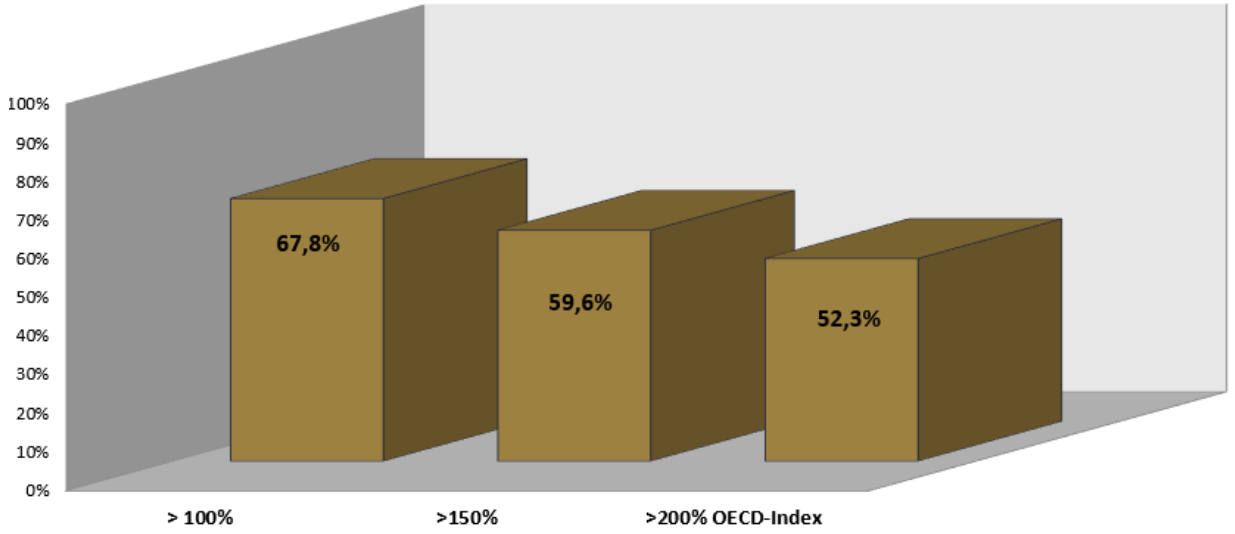


Northern America

(n/a: 12.9 %)

Other Countries

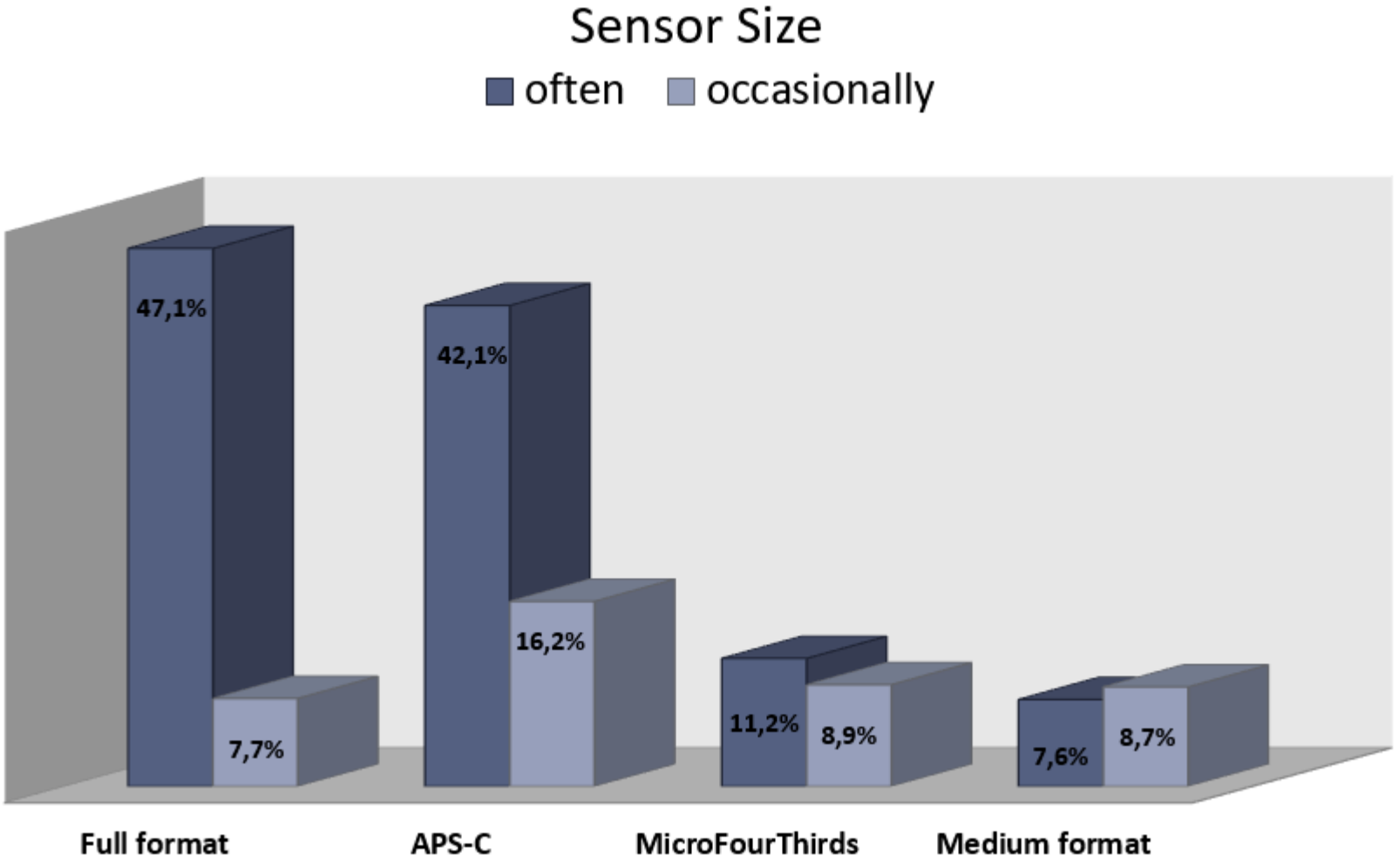
(n/a: 23.8 %)



3. Photographic Practice
Overall Results

- 41.5 per cent of the respondents answer: “Photography is my favourite activity”.
- 47.1 per cent of the readers generate their pictures often in a full format DSLR sensor size.
- 67.6 per cent of the readers generate their pictures often in a RAW file format, 45.4 per cent in a JPEG file format.
- 66.3 per cent of the readers often use the camera function M-mode, 30.3 per cent often use an automatic mode.
- “I prefer to buy photographic products of a specific brand” – 74.1 percent of the respondents agree with this statement.
- Readers of TIPA-magazines are multipliers. 63 per cent regularly advice others on the purchase of photographic equipment.

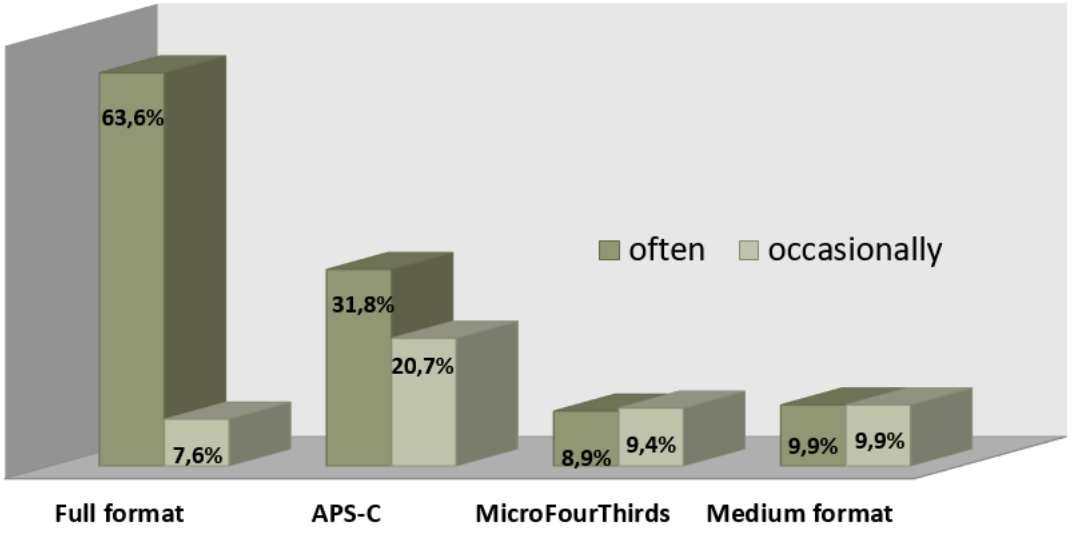
3. Photographic Practice
“My photos are generated in ...”



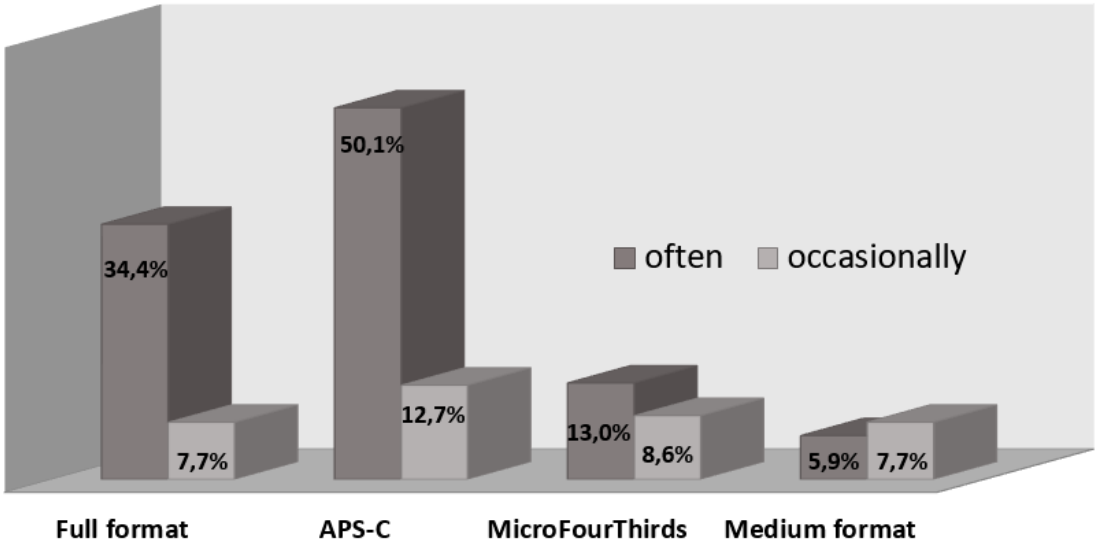
Note: More than one answer was possible

3. Photographic Practice
“My photos are generated in ...”

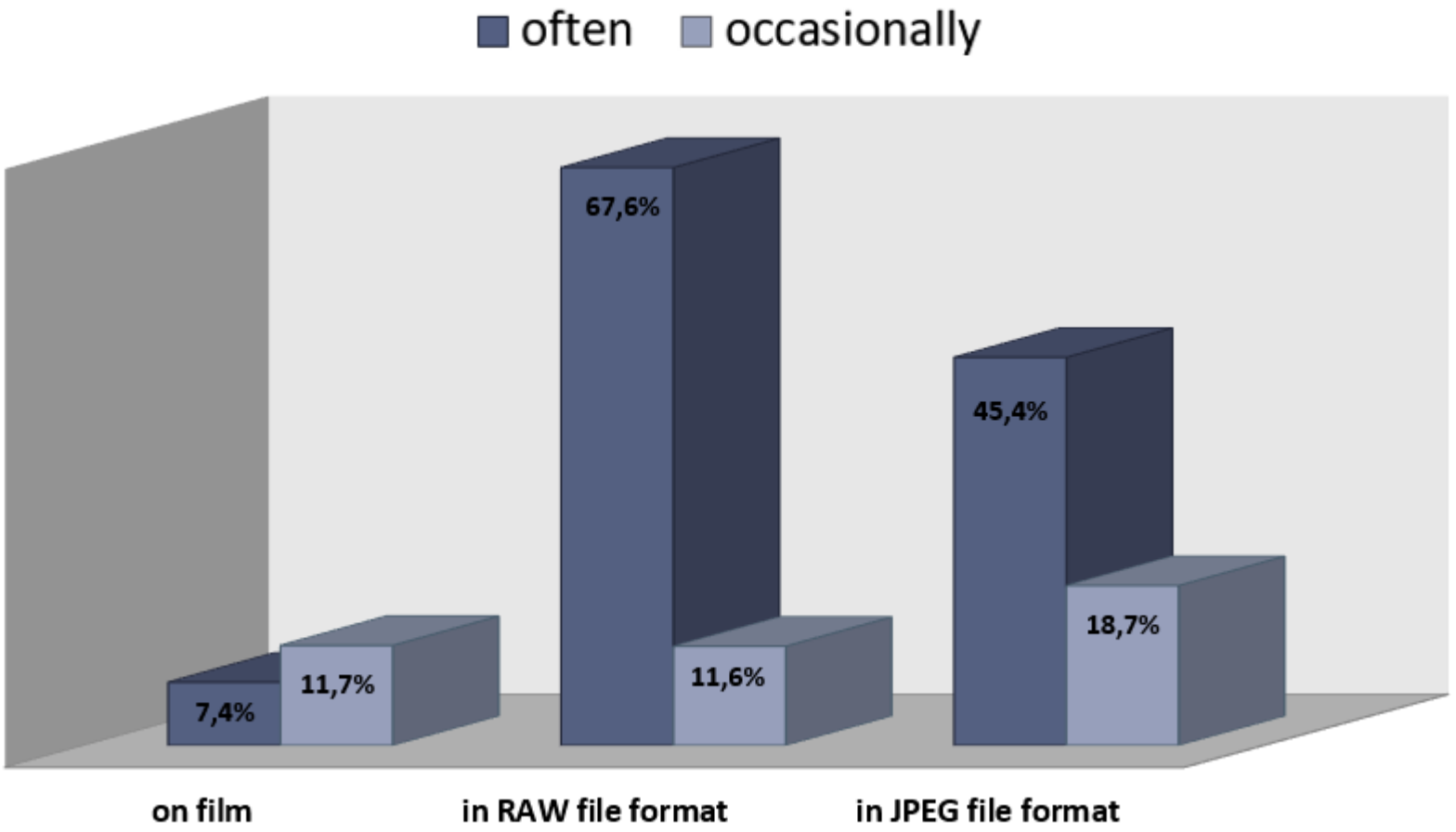
Professional Magazines
„Sensor Size“



Amateur Magazines
„Sensor Size“



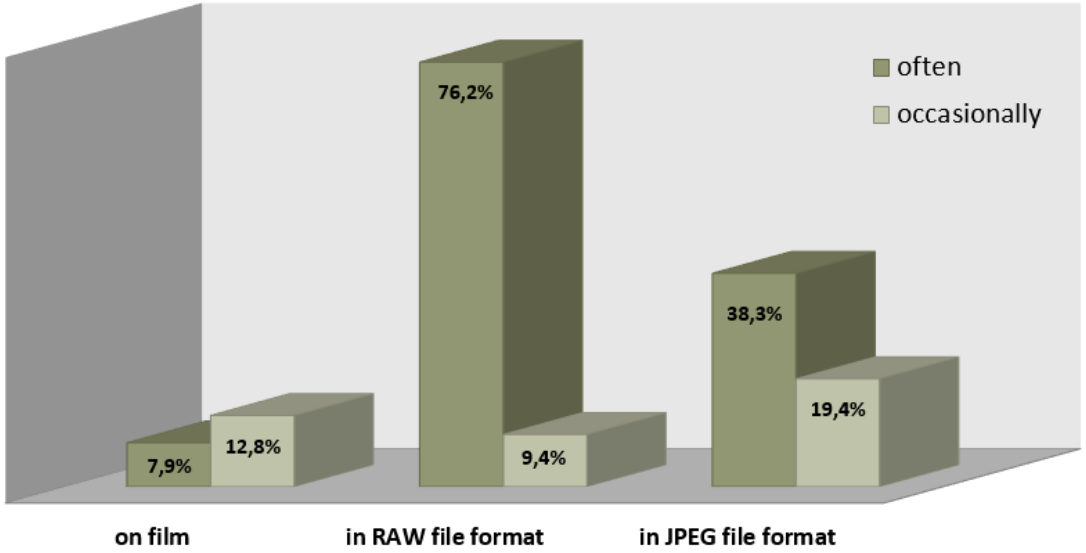
3. Photographic Practice
“My photos are generated ...”



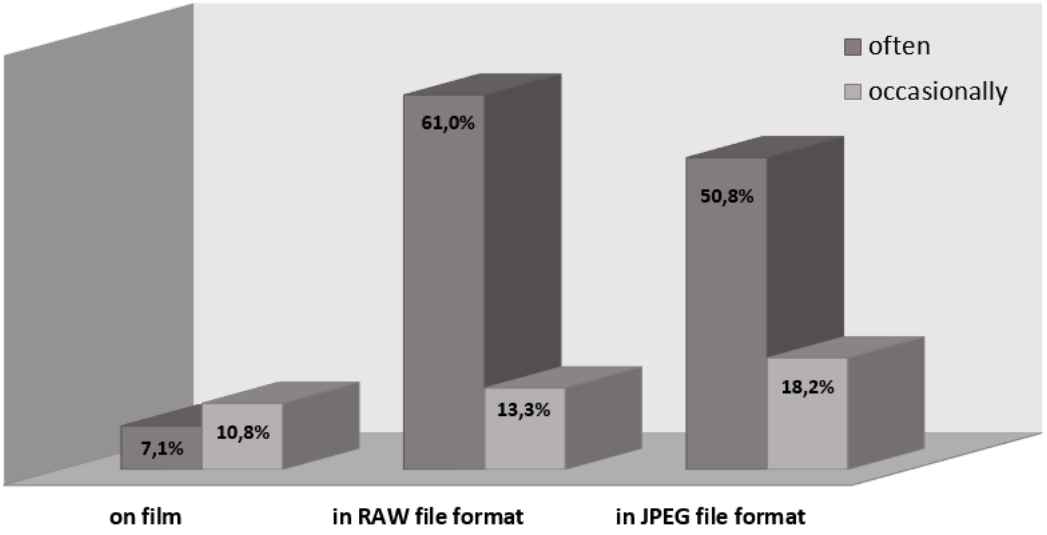
Note: More than one answer was possible

3. Photographic Practice
“My photos are generated ...”

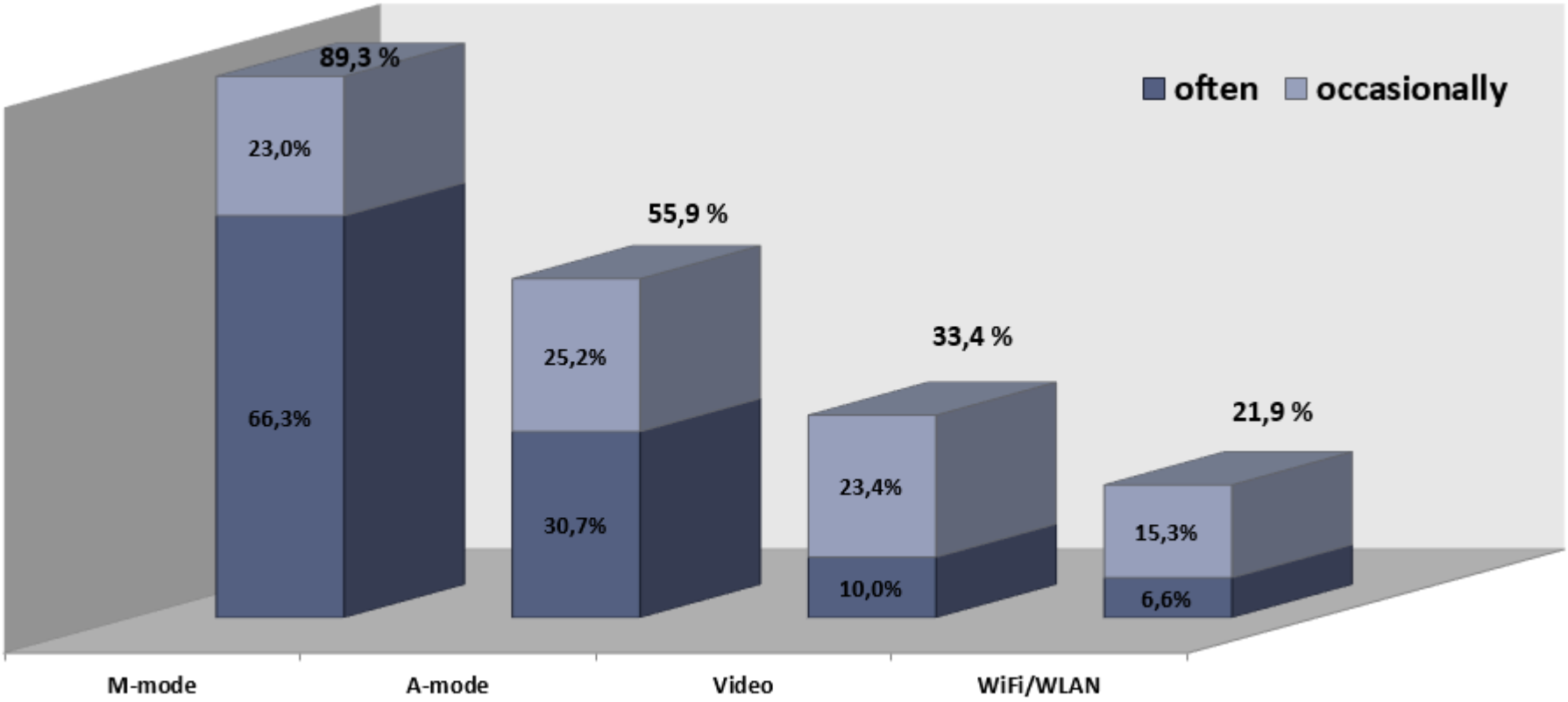
Professional Magazines



Amateur Magazines



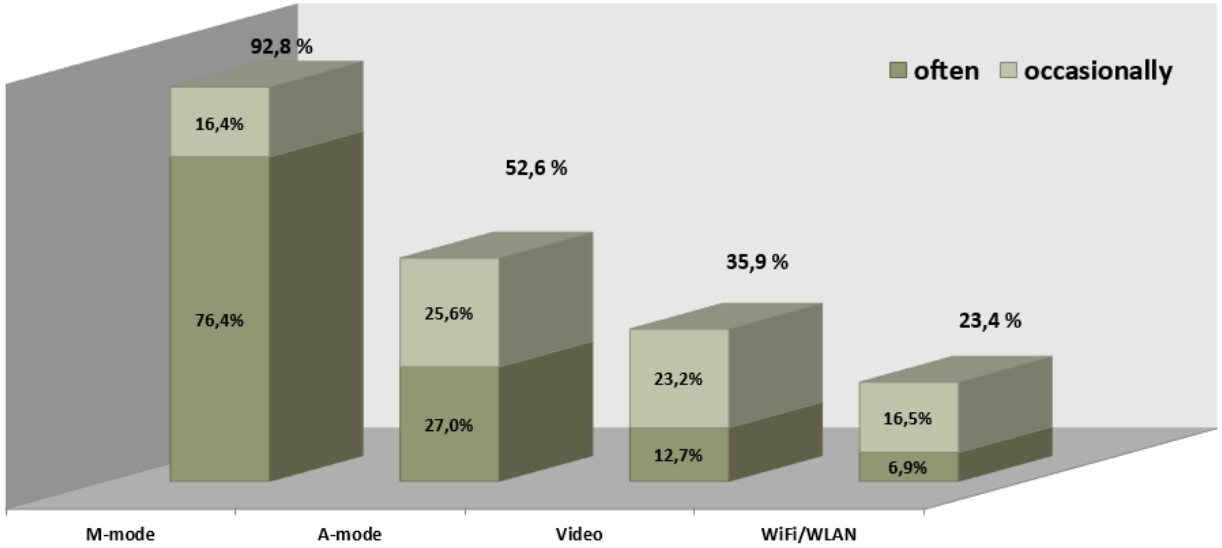
3. Photographic Practice
“I use the following camera functions”



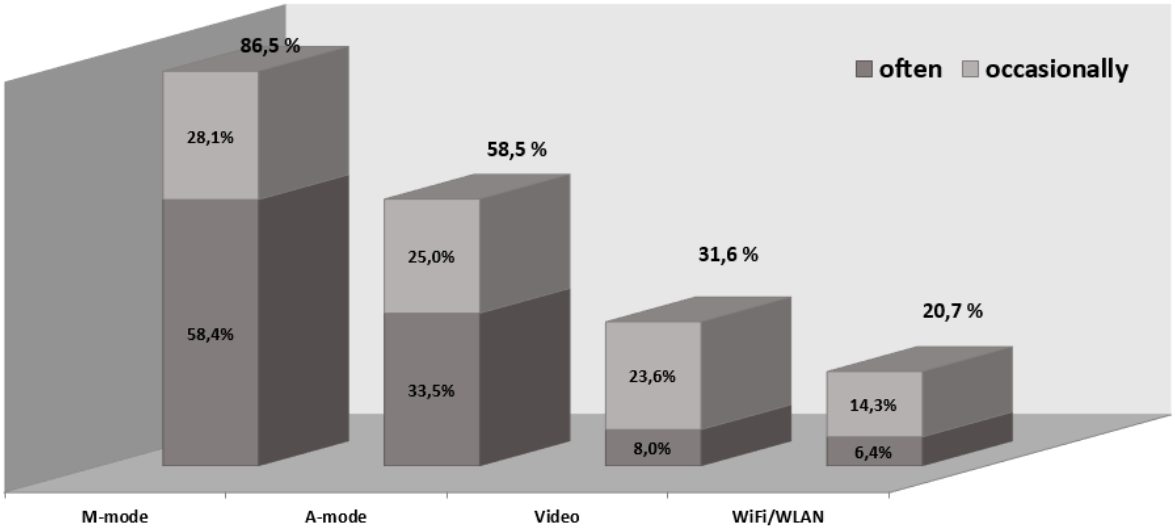
Note: More than one answer was possible

3. Photographic Practice
“I use the following camera functions”

Professional Magazines



Amateur Magazines



3. Photographic Practice
„I characterise myself as follows“

Statements:

41.5 %	“Photography is my favourite activity”
35.7 %	“I specialise in a few subjects” (nature, fashion…)
33.9 %	“I am an all-rounder without a main focus”
18.2 %	“I take pictures mainly of everyday life” (friends, family…)

Note: More than one answer was possible

3. Photographic Practice
„I characterise myself as follows“

Statements:

20.8 % “I am a trained photographer”

20.6 % “Photography is my main profession”

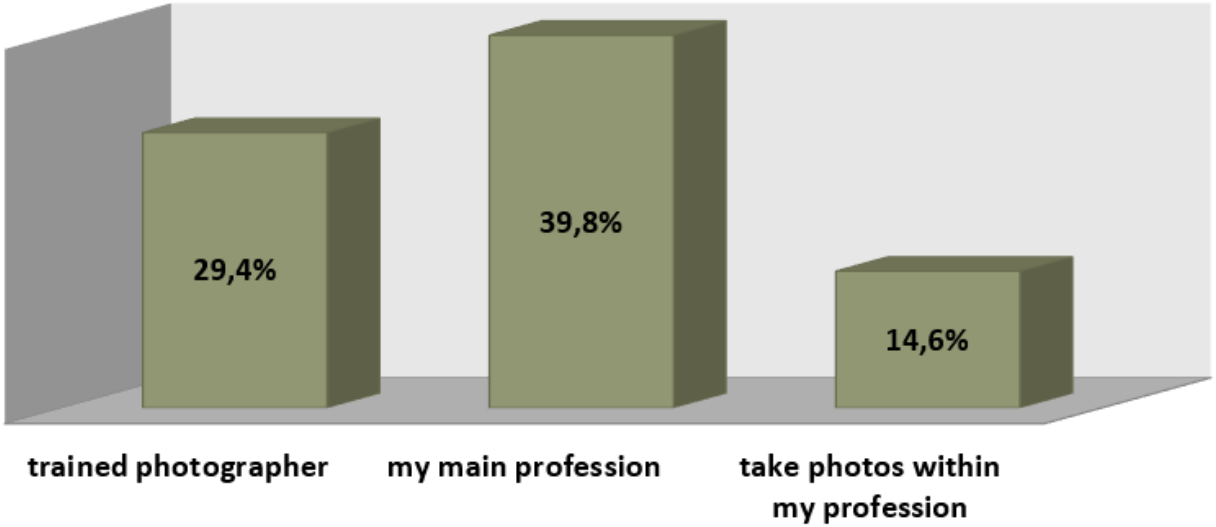
10.5 % “I take photos within my profession” (graphic design, media production…)

„I regularly use 2.2 different cameras (mean) to take pictures“

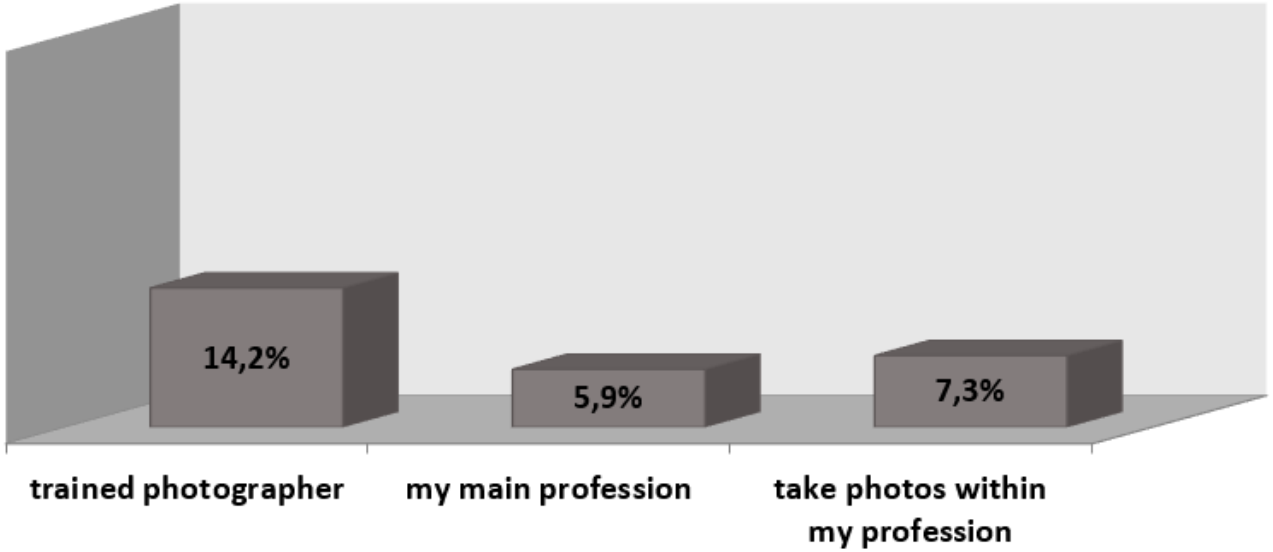
Note: More than one answer was possible

3. Photographic Practice
„I characterise myself as follows“

Professional Magazines



Amateur Magazines

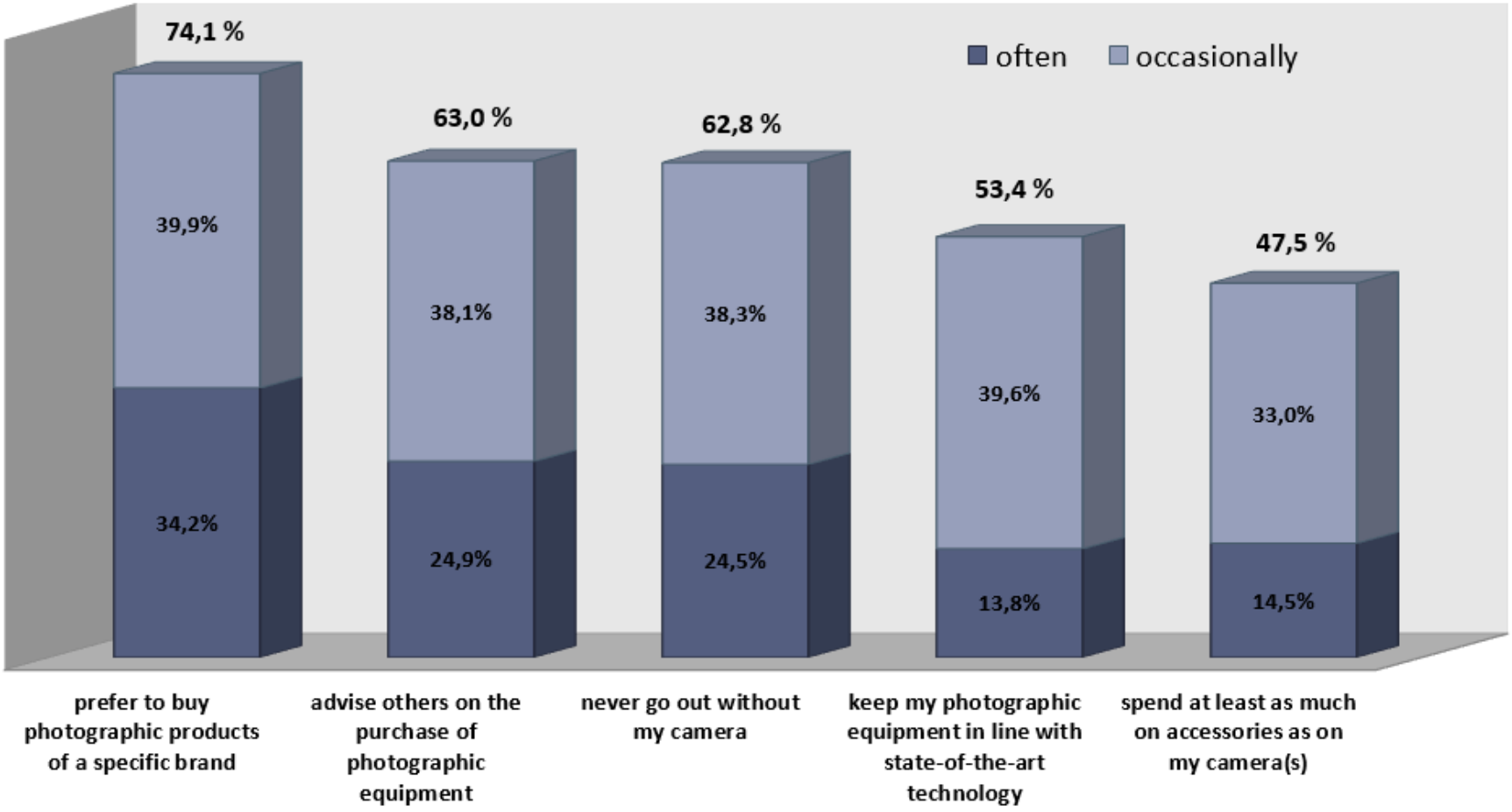


3. Photographic Practice
„The following applies to me“

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. Photographic Practice
“The following applies to me”



4. Information Sources
Overall Results

- Seen objectively, photo magazines are the most important sources of information for the readers. Fully 91 per cent of the respondents say they regularly obtain information from this source.
- The internet is the second most important source. 89 per cent of the readers said they regularly use it. Trade fairs and the readers' specialist retailer follow.
- Less than every eighth reader uses other magazines than photo magazines to obtain information about photographic equipment.
- The readers rely mostly on the photo magazines. 46.4 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 21.7 per cent of the readers. The retailers follow in third place with 10.0 per cent of responses.
- 14.2 per cent of the readers did not give an unambiguous answer.
- The ratings of credibility for other magazines are very poor (< 2 per cent).

4. Information Sources By Region

“I regularly obtain information ...”

(in %)	Total	Europe	
		Central	Southern
photo magazines	90.8	93.4	86.6
internet	89.0	88.2	90.1
trade fairs	28.7	32.1	25.0
my specialist retailer	27.8	28.8	25.9
company brochures	19.5	17.1	20.1
other magazines	13.0	12.1	8.2

4. Information Sources By Region

“I regularly obtain information ...”

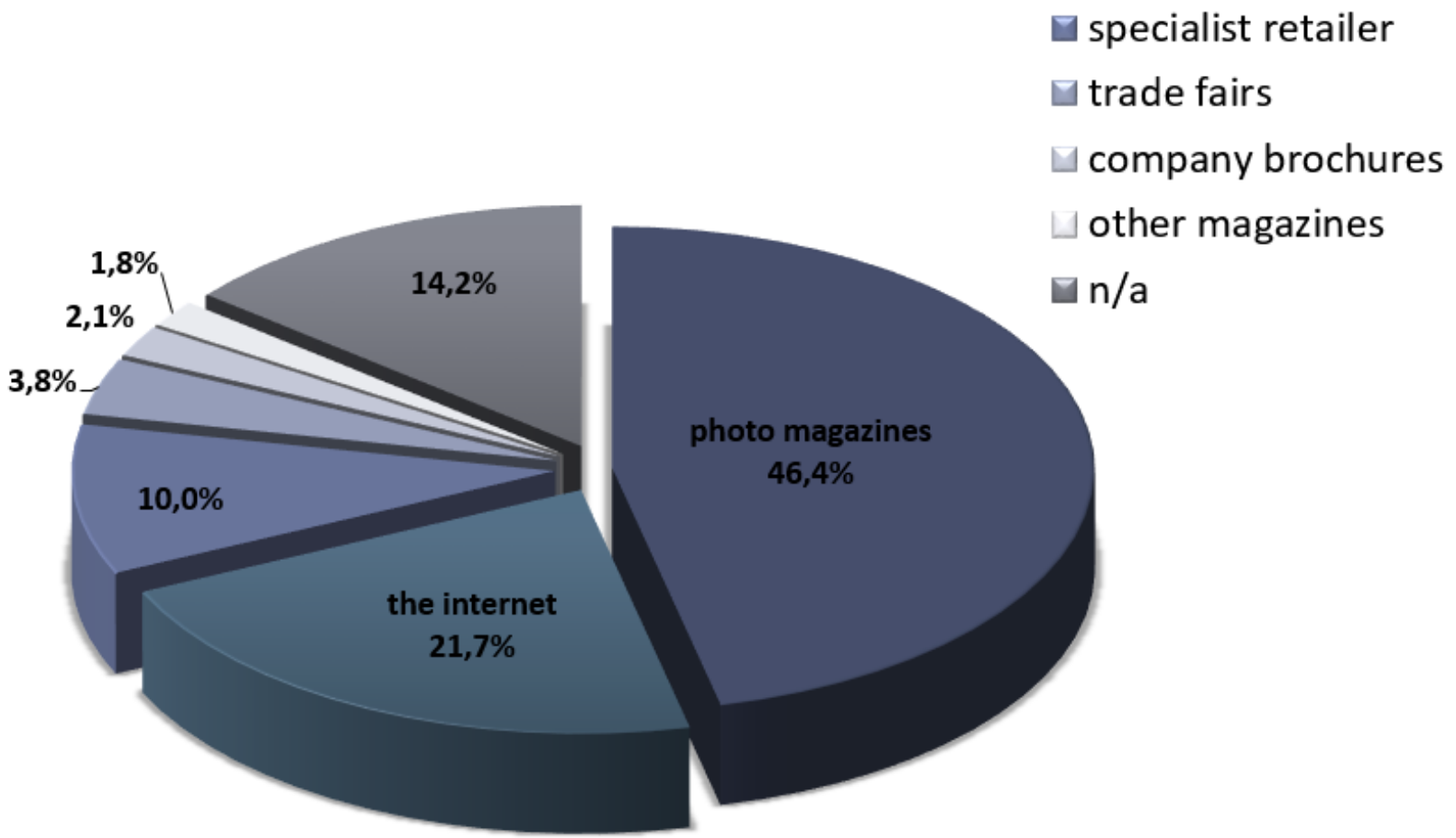
(in %)	Total	Northern America	Other Countries
photo magazines	90.8	96.4	80.5
internet	89.0	91.1	86.5
trade fairs	28.7	25.1	27.1
my specialist retailer	27.8	35.3	16.8
company brochures	19.5	22.5	22.9
other magazines	13.0	21.4	13.3

4. Information Sources By Target Group

“I regularly obtain information ...”

(in %)	Total	Professional Magazines	Amateur Magazines
photo magazines	90.8	87.9	93.0
internet	89.0	91.5	87.1
trade fairs	28.7	40.7	19.4
my specialist retailer	27.8	31.4	25.0
company brochures	19.5	23.1	16.6
other magazines	13.0	14.0	12.3

4. Information Sources
“I trust most in ...”



4. Information Sources By Region

“I trust most in ...”

(in %)	Total	Europe	
		Central	Southern
photo magazines	46.4	51.1	42.8
internet	21.7	20.6	22.1
my specialist retailer	10.0	10.1	9.3
trade fairs	3.8	3.5	3.0
company brochures	2.1	1.4	2.2
other magazines	1.8	1.3	0.6

4. Information Sources By Region

“I trust most in ...”

(in %)	Total	Northern America	Other Countries
photo magazines	46.6	42.3	40.9
internet	21.7	24.6	21.5
my specialist retailer	10.0	13.8	6.2
trade fairs	3.8	4.4	5.0
company brochures	2.1	2.6	4.1
other magazines	1.8	3.5	2.6

4. Information Sources By Target Group

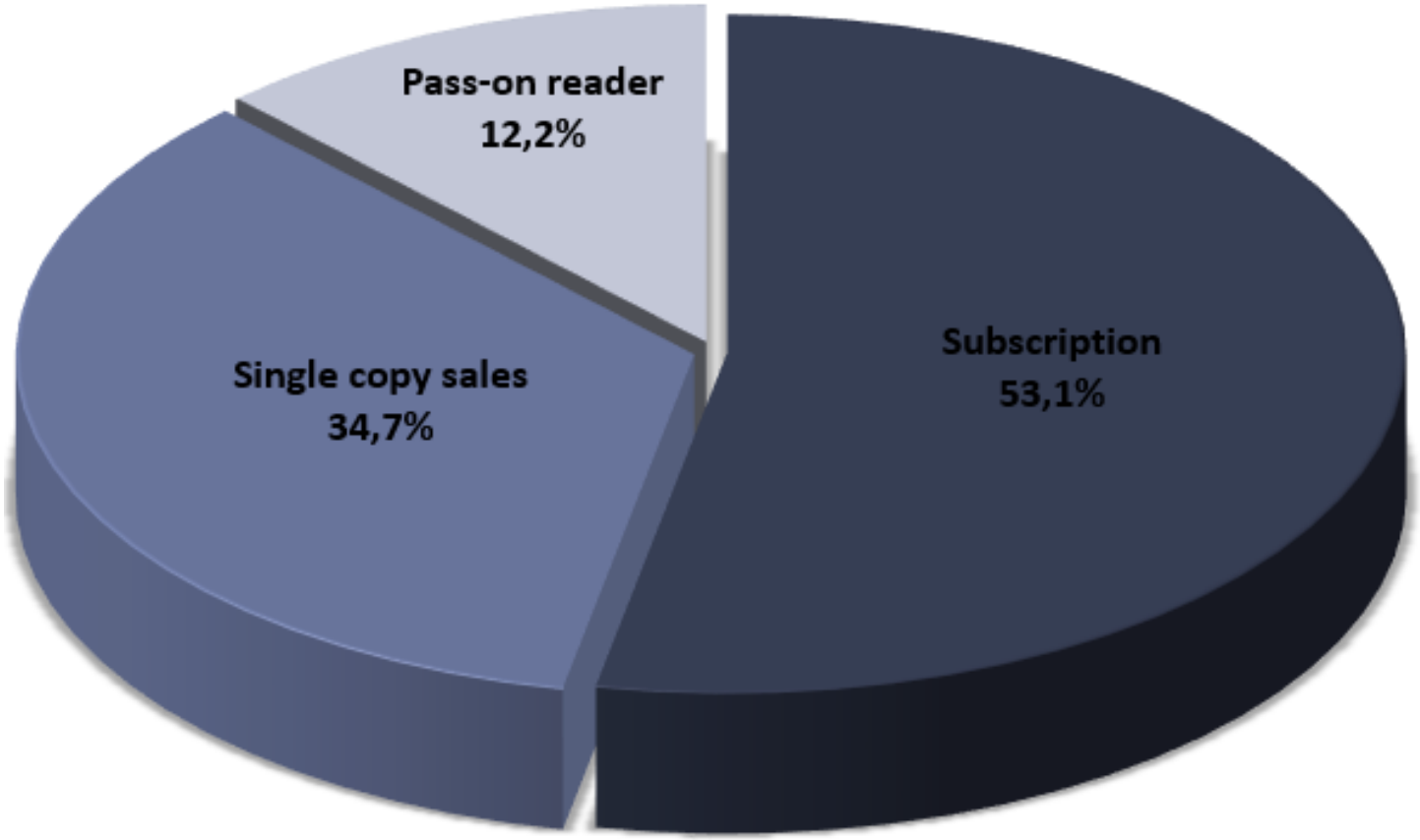
“I trust most in ...”

(in %)	Total	Professional Magazines	Amateur Magazines
photo magazines	46.6	37.6	53.2
internet	21.7	23.9	20.1
my specialist retailer	10.0	12.3	8.3
trade fairs	3.8	5.8	2.2
company brochures	2.1	2.6	1.7
other magazines	1.8	1.8	1.6

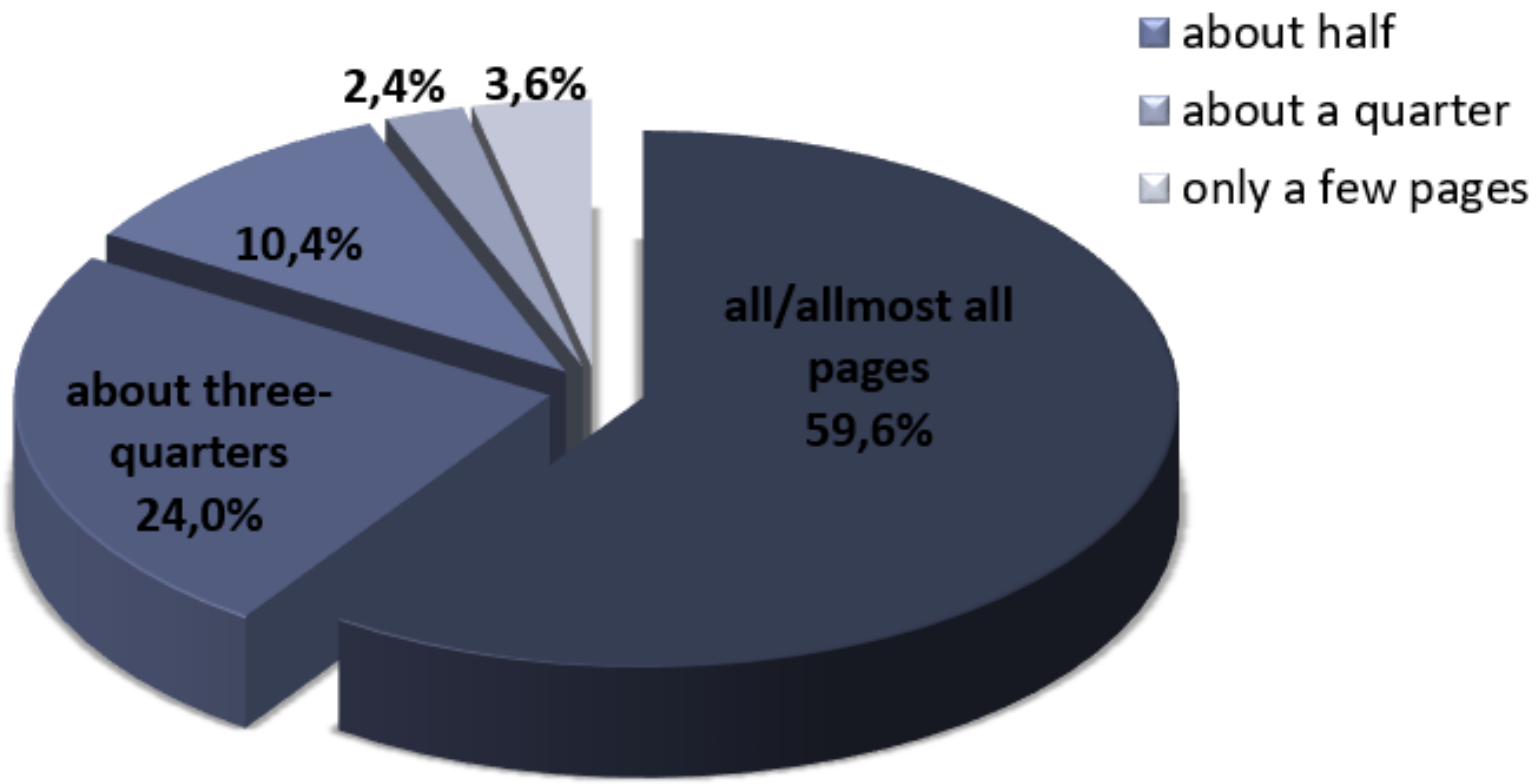
5. Reading Behaviour
Overall Results

- 52.1 per cent of the respondents in the survey were subscribers, 34.1 per cent were single copy buyers.
- The readers pick up their photo magazine an average of 5.1 times and read it for a total of 69 minutes.
  (Due to the difference in periodic variation, no distinctions were made by region.)
- Overall, all TIPA titles show an average probability of 82.5 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 the readers take every issue. Referred to all titles, every single issue on a statistical average reaches almost 62.9 per cent of the readers from the maximum readership.
- On average, every copy of a magazine is read by 2.3 people.

5. Reading Behaviour
Magazine Purchases



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

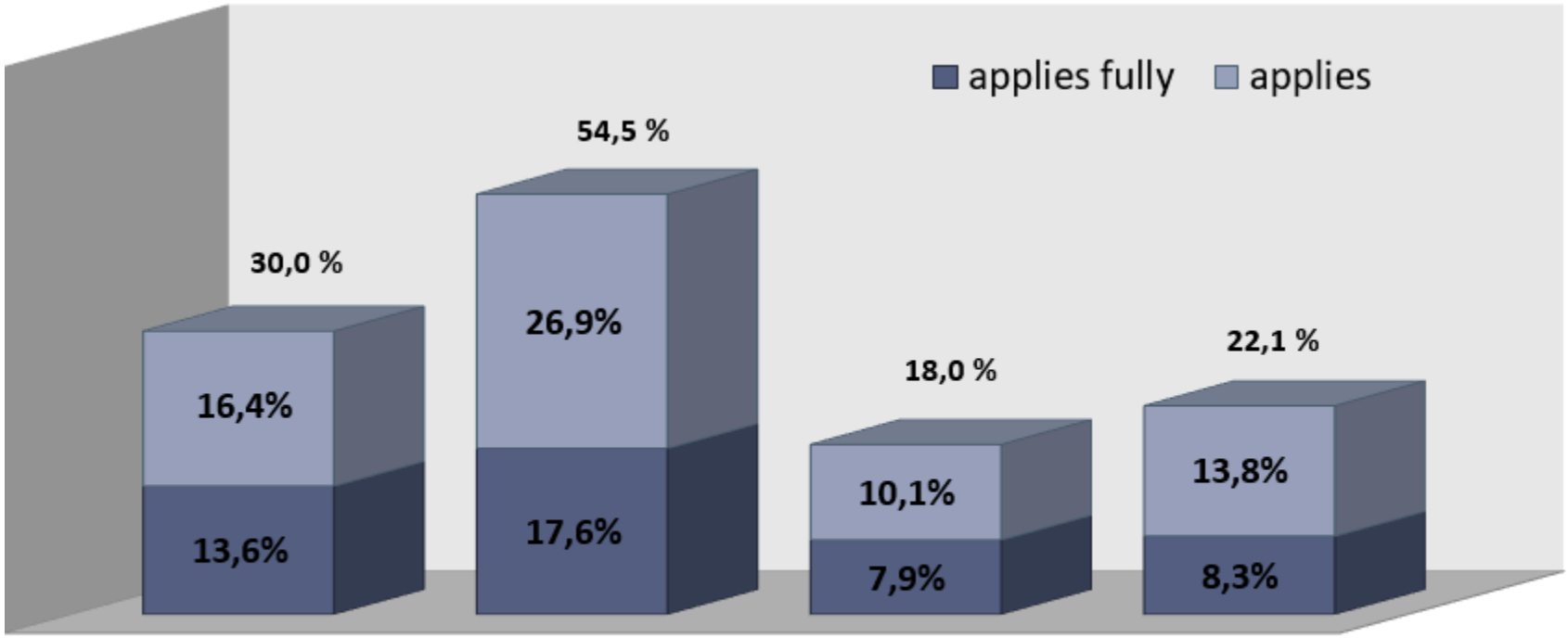


Probability of page exposure: 82.5 % (66 % - 93 %)

5. Reading Behaviour

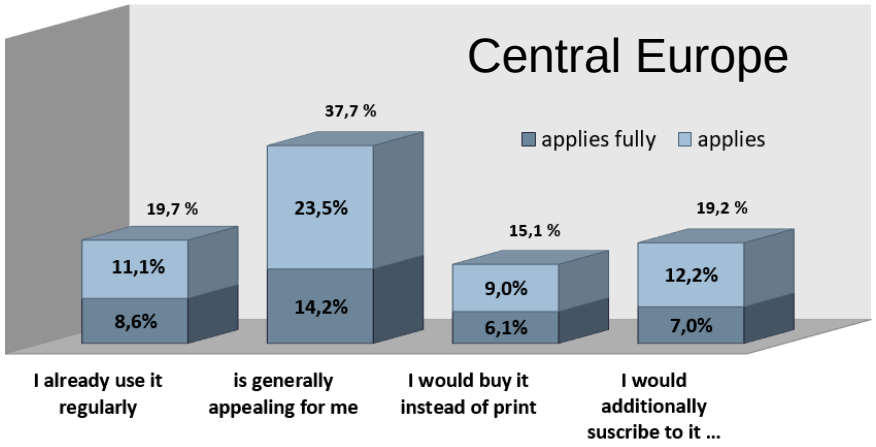
Reading time: 69 minutes	• **Minimum mean: 40 min.** • **Maximum mean: 105 min.**
Frequency of utilisation per copy: 5.1	• **Minimum mean: 2.3** • **Maximum mean: 7.4**
Readers per copy: 2.3	• **Minimum mean: 1.5** • **Maximum mean: 6.0**
Readers of any issue: 62.9 %	• **First time readers: 9.9 %**

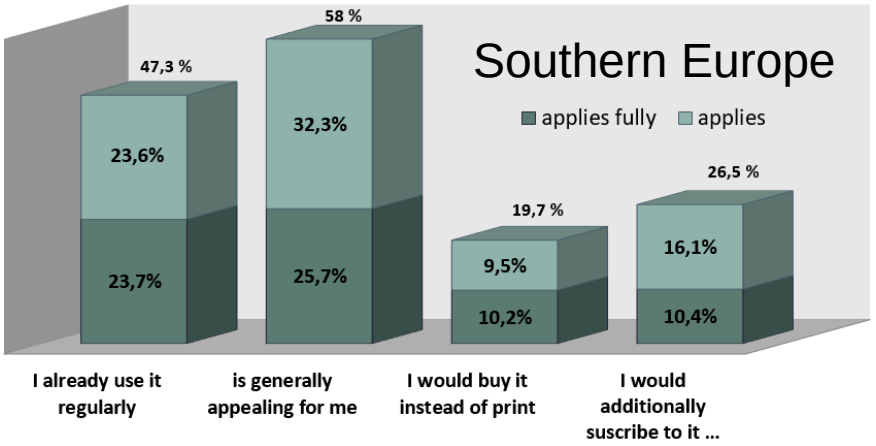
5. Reading Behaviour
“A digital magazine version...”

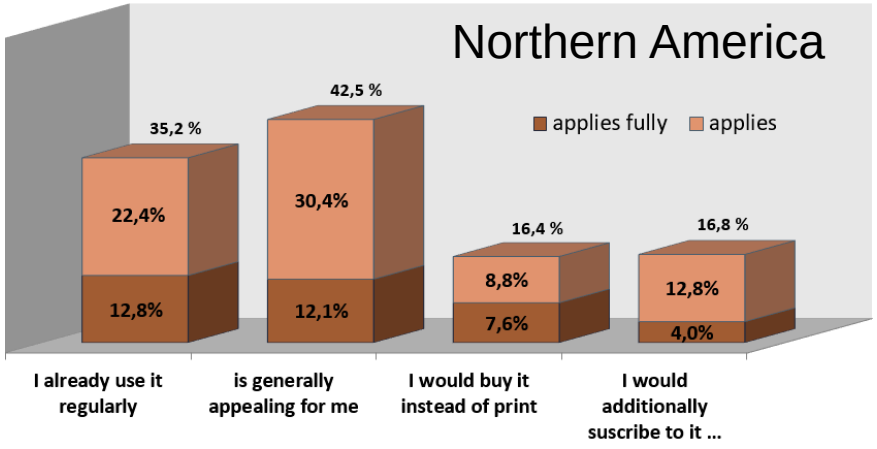


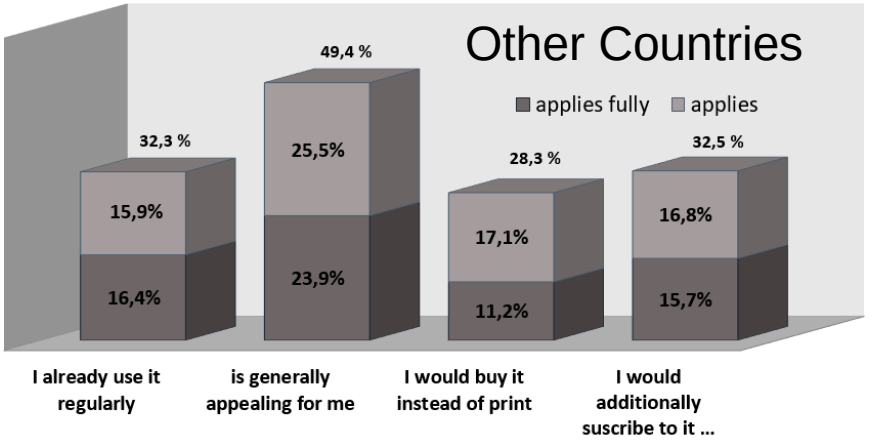
***... with special features at extra charge**

5. Reading Behaviour
“A digital magazine version...”



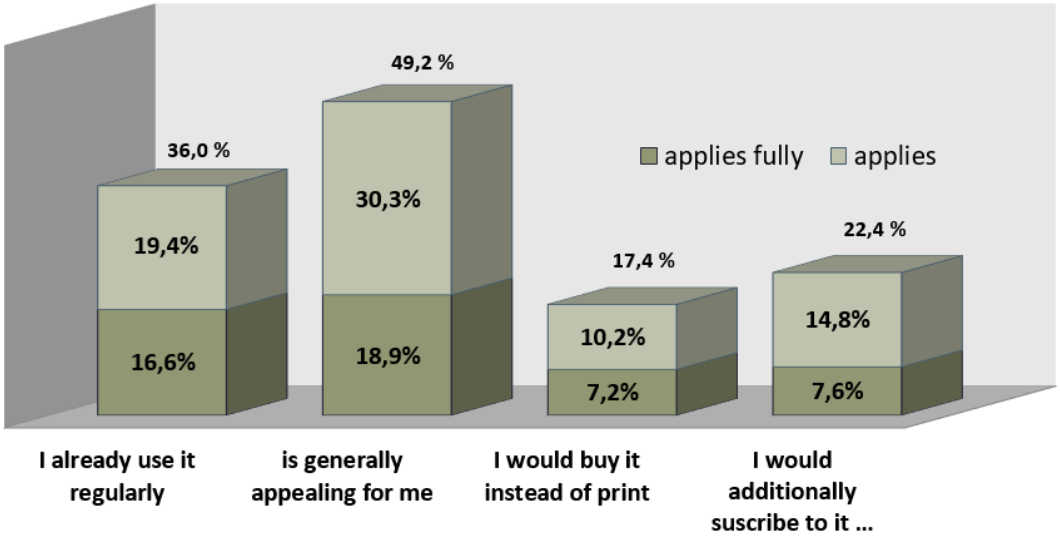




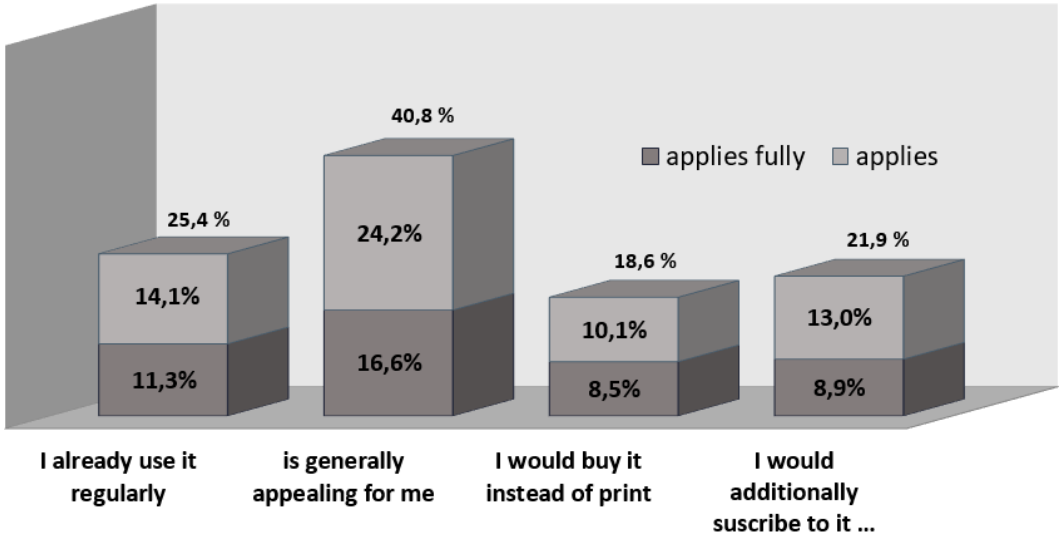


5. Reading Behaviour
“A digital magazine version...”

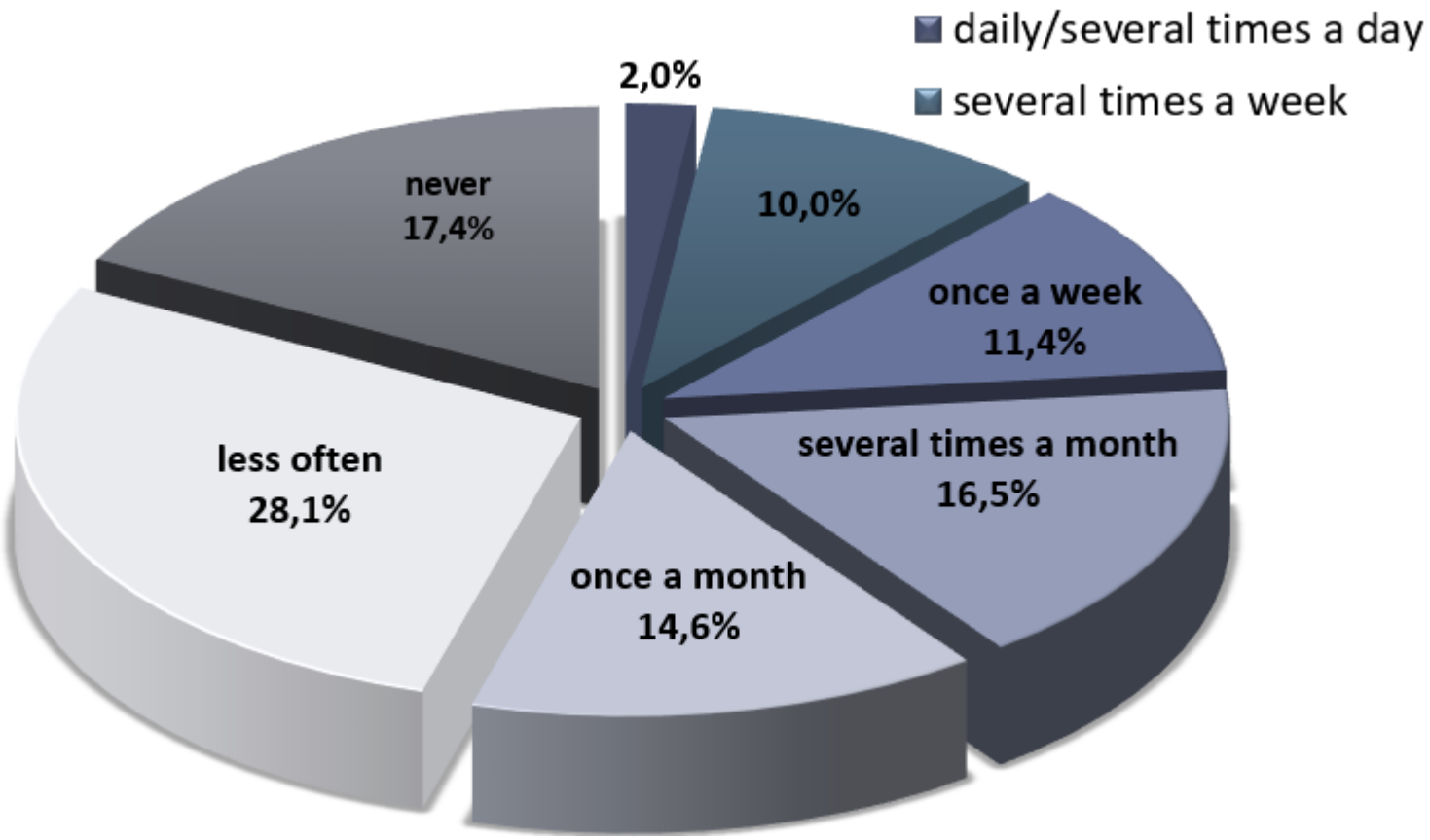
Professional Magazines



Amateur Magazines



5. Reading Behaviour
“I visit the website of the magazine …”



6. Attitudes to the Magazines
Overall Results

- Overall, the TIPA readers have a positive opinion of their photo magazine. More than 70 per cent of the respondents agree with all provided statements.

- 87 per cent of the readers classify their magazine as “competent”, another 85 per cent as an “important magazine”.

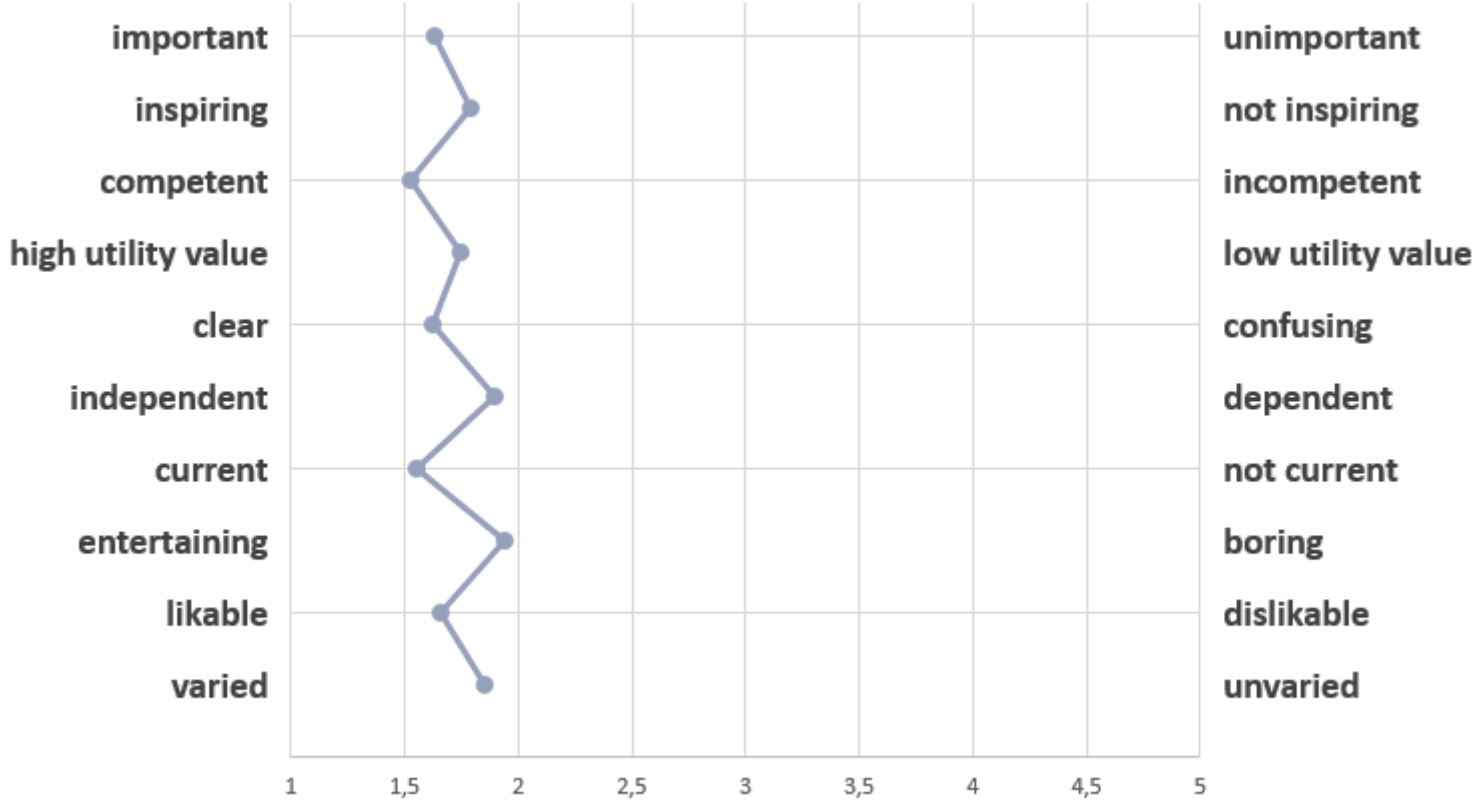
- 84 per cent of respondents say they would miss their magazine “very strong” or “strong”, if the magazine were no longer published.

- The most important topic is “techniques of photography: tips an tricks”. 89 per cent of the respondents want to read about this topic in their magazine.

- Another 84.3 per cent of the readers want to read about “detailed camera tests”.

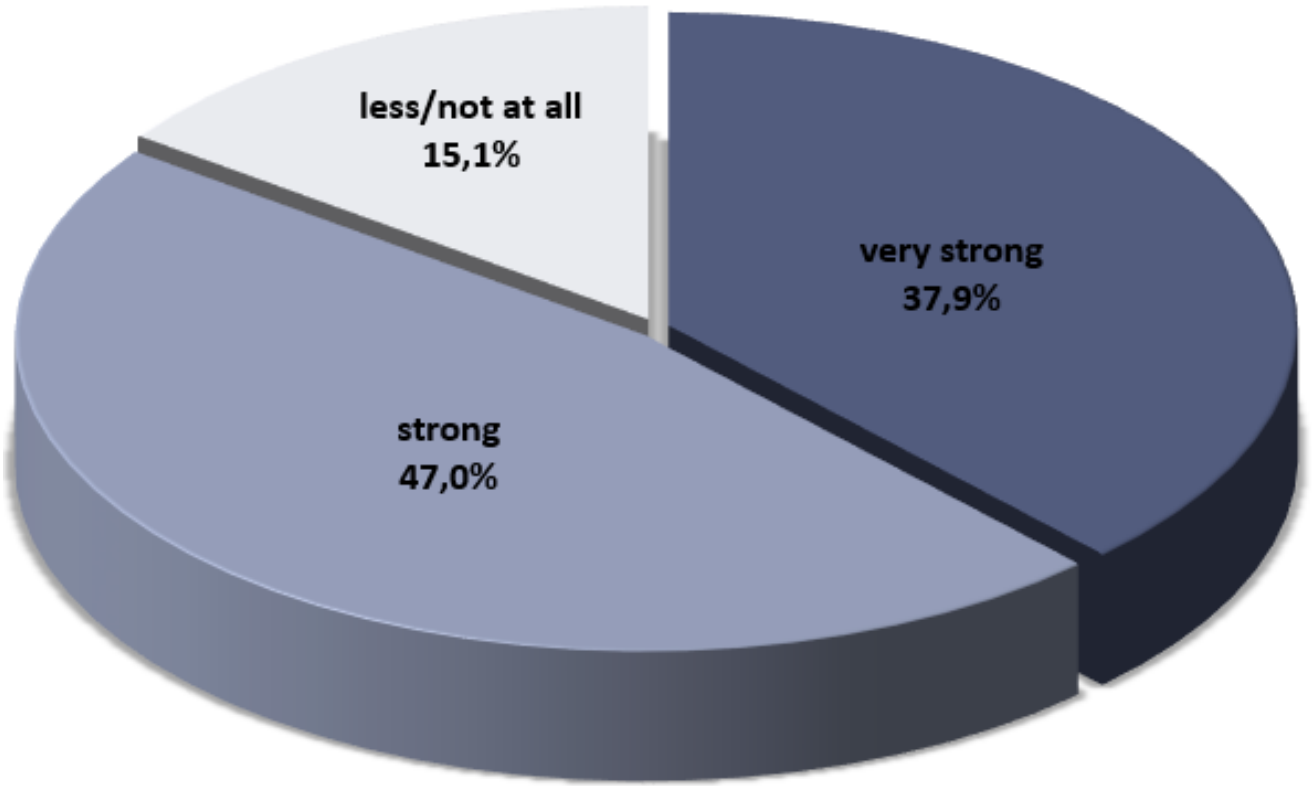
6. Attitudes to the Magazines
Ratings

I rate the magazine as follows:

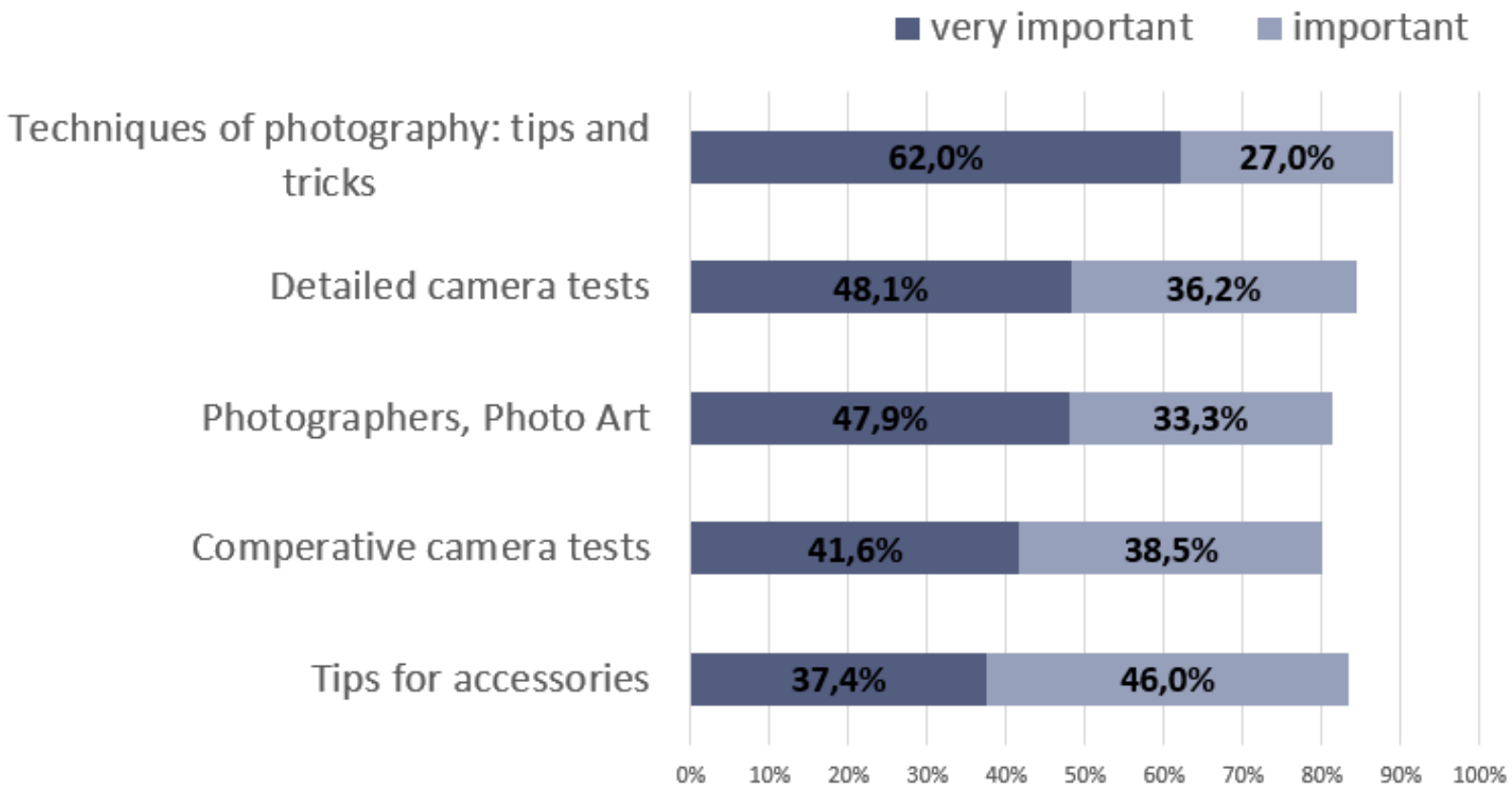


6. Attitudes to the Magazines "would miss"

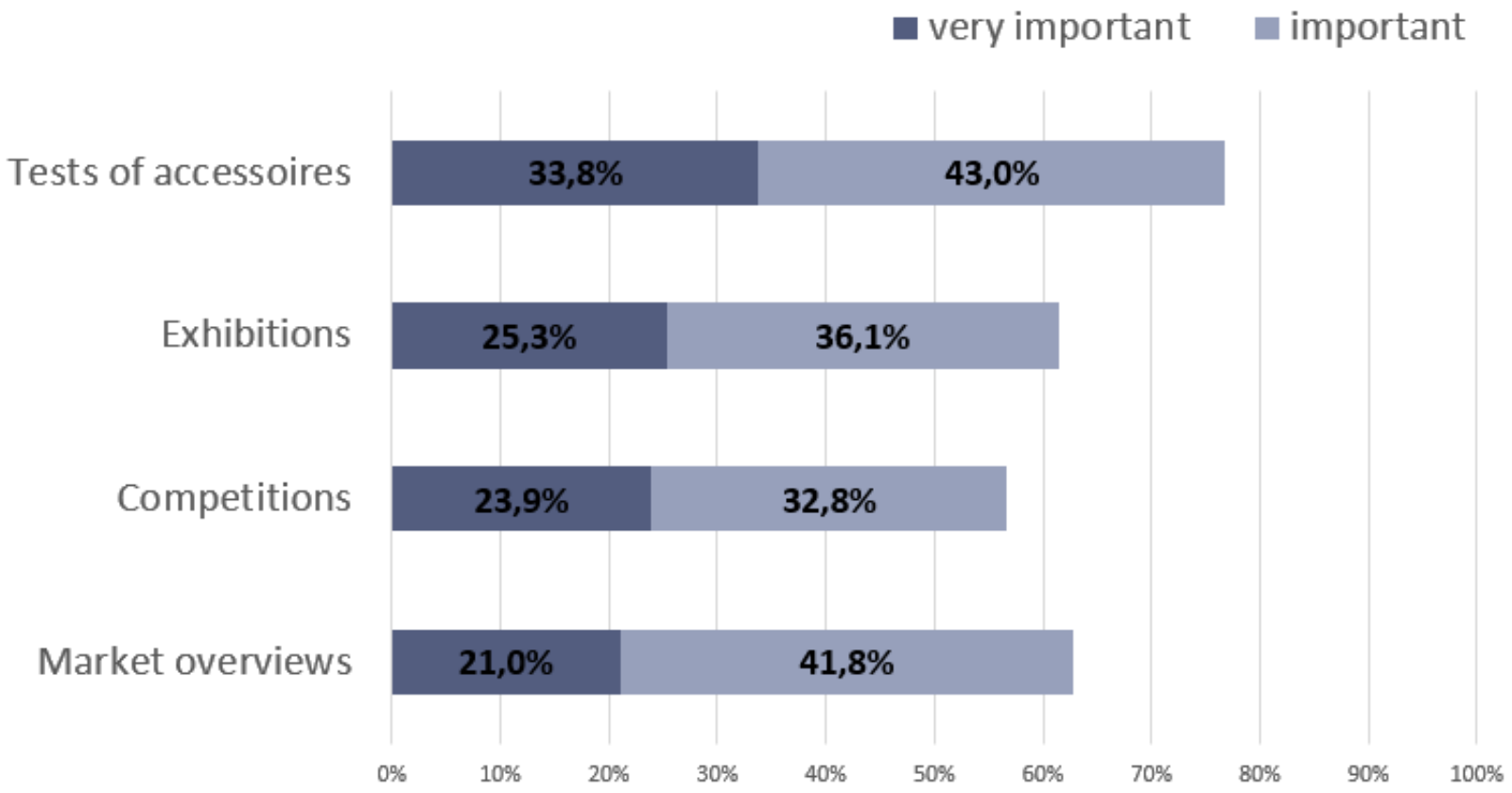
If the magazine were no longer published I would miss it …



About these topics I want to read (I):



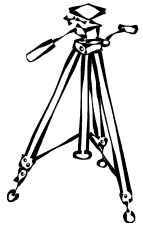
About these topics I want to read (II):



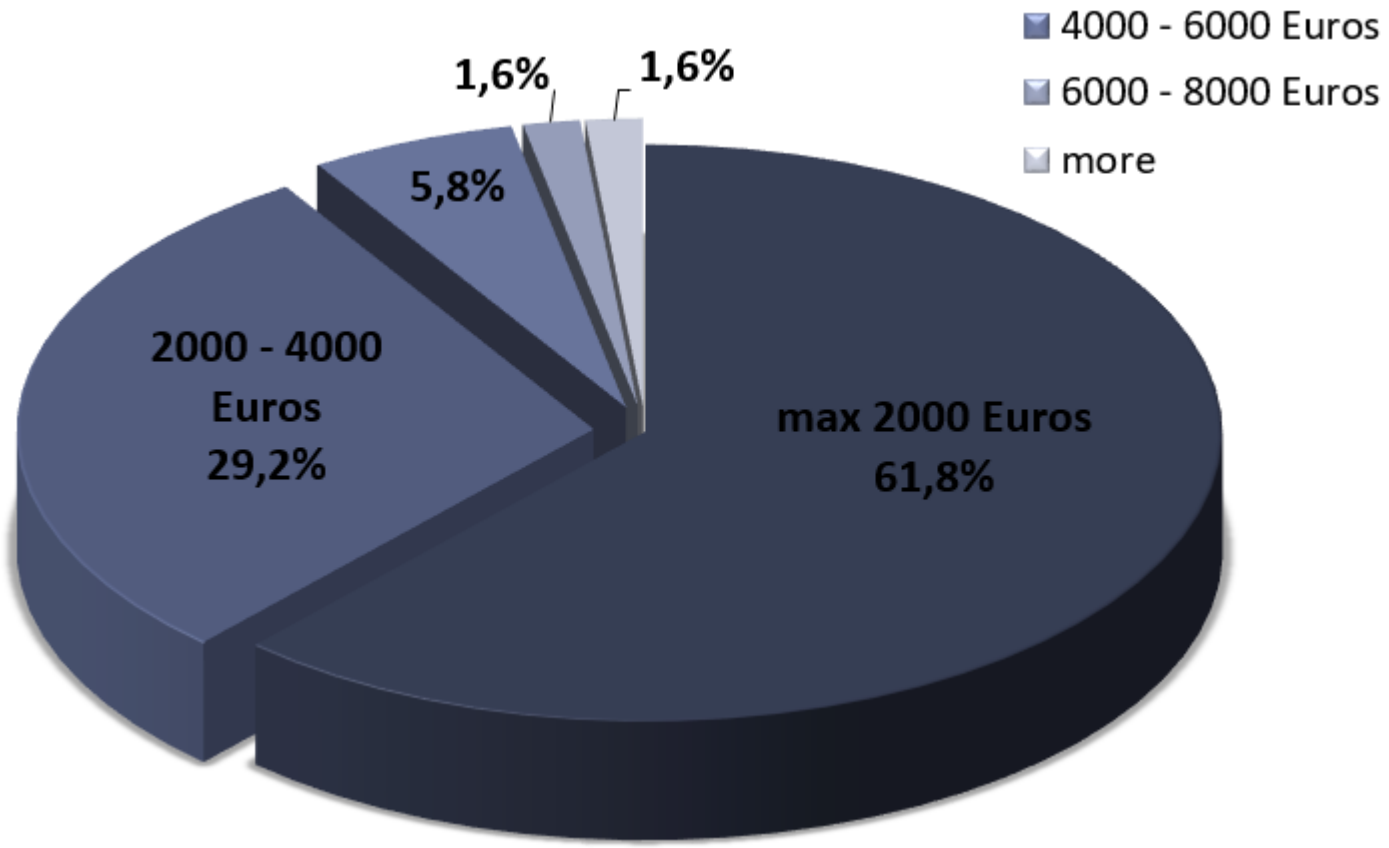
7. Buying Behaviour and Attention to Advertisements: Overall Results

- **Interchangeable lenses** are the readers' top priority in purchasing intentions, followed by **accessories**.
- Among the readers of Amateur Magazines 28.4 percent are planning to spend on photographic purchases between 2000 and 4000 Euros, nearly 9 percent even more than 4000 Euros.
- Among the readers of Professional Magazines every third person is investing 2000 to 4000 Euros on average per year in his photographic equipment. Nearly every fourth person is investing more than 4000 Euros.
- 78 per cent of the TIPA readers say that they always or often read advertisements.
- Nearly three out of four readers find that advertisements have informational value.
- More than every second reader (52.7 %) was prompted by an advertisement into buying a photography-related article.
- The majority of the readers (above 60 percent) are familiar with the TIPA-logos and would decide in favour of products having won a TIPA-award.

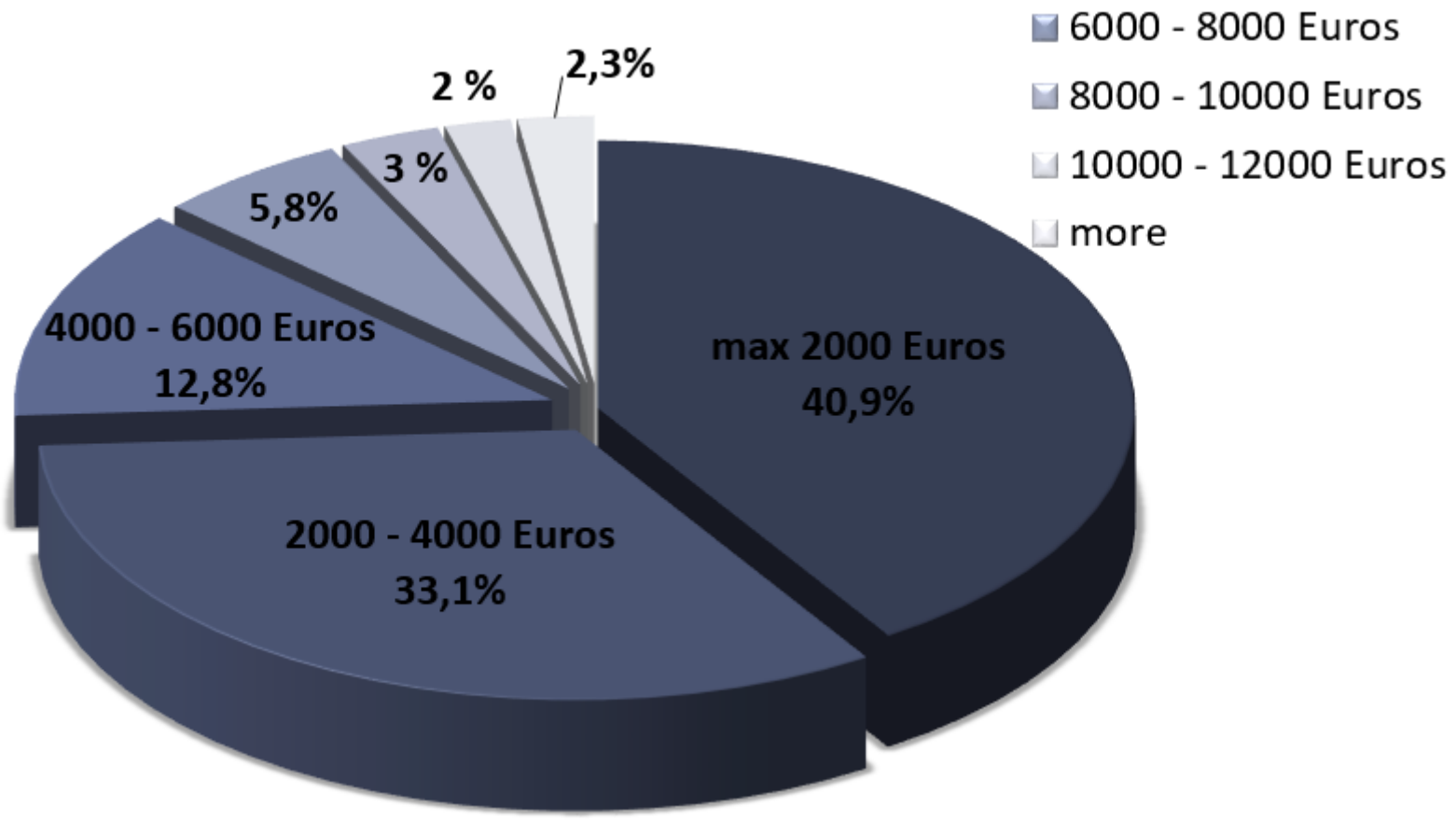
7. Buying Behaviour
“I intend to buy...”

Interchangeable lenses 64.5 %	Accessoires 47.9 %	Digital SLR photo camera 41.9 %	Photo/graphics software 28.6 %
Studio lighting 22.9 %	Tripod 19.6 %	Digital compact system camera 16.3 %	Photo printer 16.1 %
Camera drone 12.1 %	Color Management System 8.4 %	Digital compact camera 7.9 %	Scanner 7.2 %
	Digital Medium Format System 7.0 %	Action cam 6.5 %	

“I am planning to spend on these purchases in total:”



“Per year I invest in my photographic equipment on average:”



7. Buying Behaviour
Test seals and awards

“In general, when I intend to buy products of high quality”

62.6 %	“I feel that test seals and awards provide a helpful guidance”
42.9 %	“Test seals and awards signal a high quality”
41.1 %	“Test seals and awards support my purchase decision”

Note: Online only; more than one answer was possible

“In general, when I intend to buy products of high quality”

(in %)	Total	Central Europe	Southern Europe	Northern America	Other Countries
test seals and awards…					
“provide a helpful guidance”	62.6	62.6	63.5	58.9	66.7
“signal a high quality”	42.9	48.0	35.4	33.4	44.5
“support my decision”	41.1	44.6	36.8	40.1	33.9

Note: Online only; more than one answer was possible

7. Buying Behaviour
TIPA Logos

“I associate with these logos”

60.4 %	“An award given to high quality photo cameras and imaging products”
36.5 %	“A global non-profit association of photo and imaging magazines”
22.8 %	“Purchasing recommendations of the TIPA editors”
17.8 %	“The meanings of the logos are unknown to me” (friends, family…)

Note: More than one answer was possible

7. Buying Behaviour
TIPA Logos

“I associate with these logos”

(in %)	Total	Central Europe	Southern Europe	Northern America	Other Countries
“award”	60.4	67.9	62.2	40.5	56.9
“association”	36.5	31.8	47.8	30.2	43.6
“recommendations”	22.8	21.8	26.4	21.1	23.0
“unkown”	17.8	14.6	6.3	41.6	17.2

Note: More than one answer was possible

7. Buying Behaviour
TIPA Award

“If I have to make a choice between two photo products, one of them having won a TIPA-Award, I would decide in favor of the product with the TIPA-Award”

How much does this statement apply?

Participants had to rate on a scale of 1 for „applies fully“ to 10 for „does not apply at all”

1	2	3	4	5	6	7	8	9	10
9.1%	13.5%	18.5%	10.5%	9.0%	7.3%	7.9%	7.5%	4.0%	6.6%

Sum 1-3: **41.1** %

Sum 1-5: **60.7** %

Sum 6-10: **33.3** %

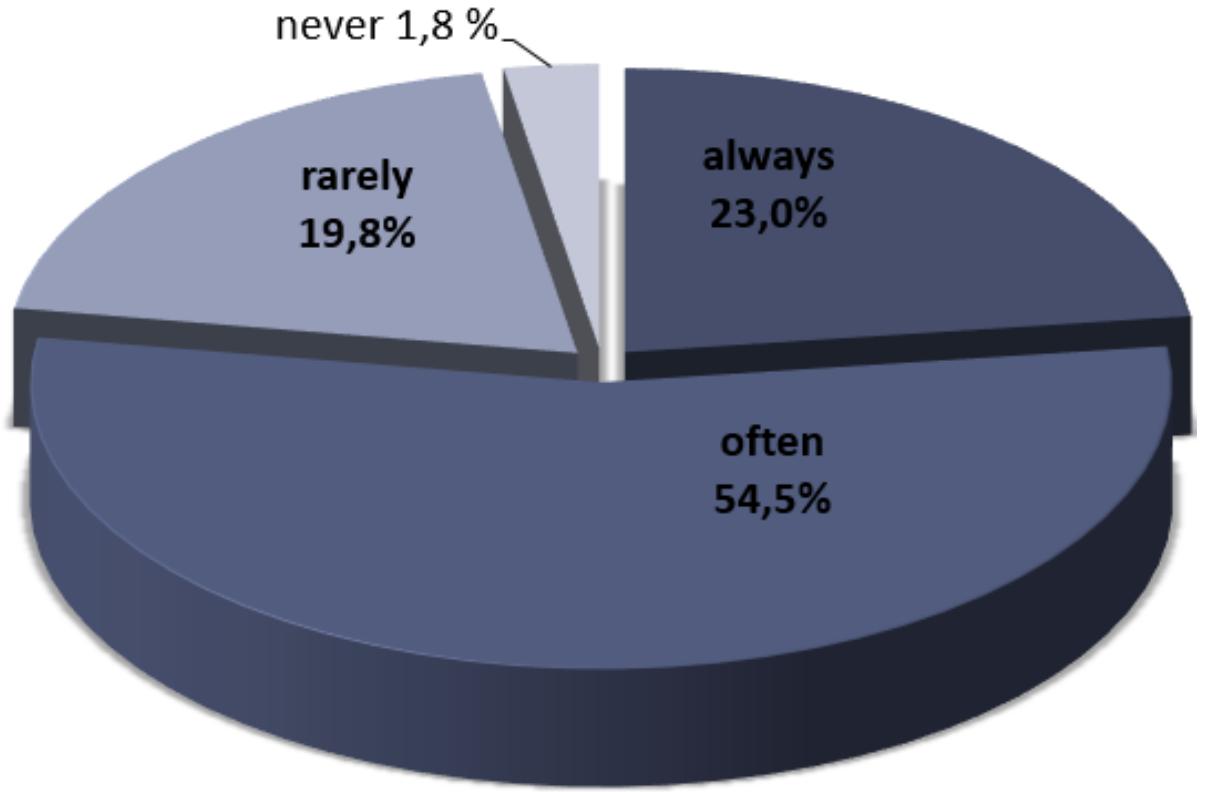
n/a: 6 %

7. Attention to Advertisements

- 23 per cent of the TIPA readers say they “always” read advertisements, a further 54.6 per cent say they “often” do so.
- Every second reader agrees (“applies”) with the statement that advertisements have informational value. A further 21.2 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 53 per cent were prompted by an advertisement into buying a photography-related article.

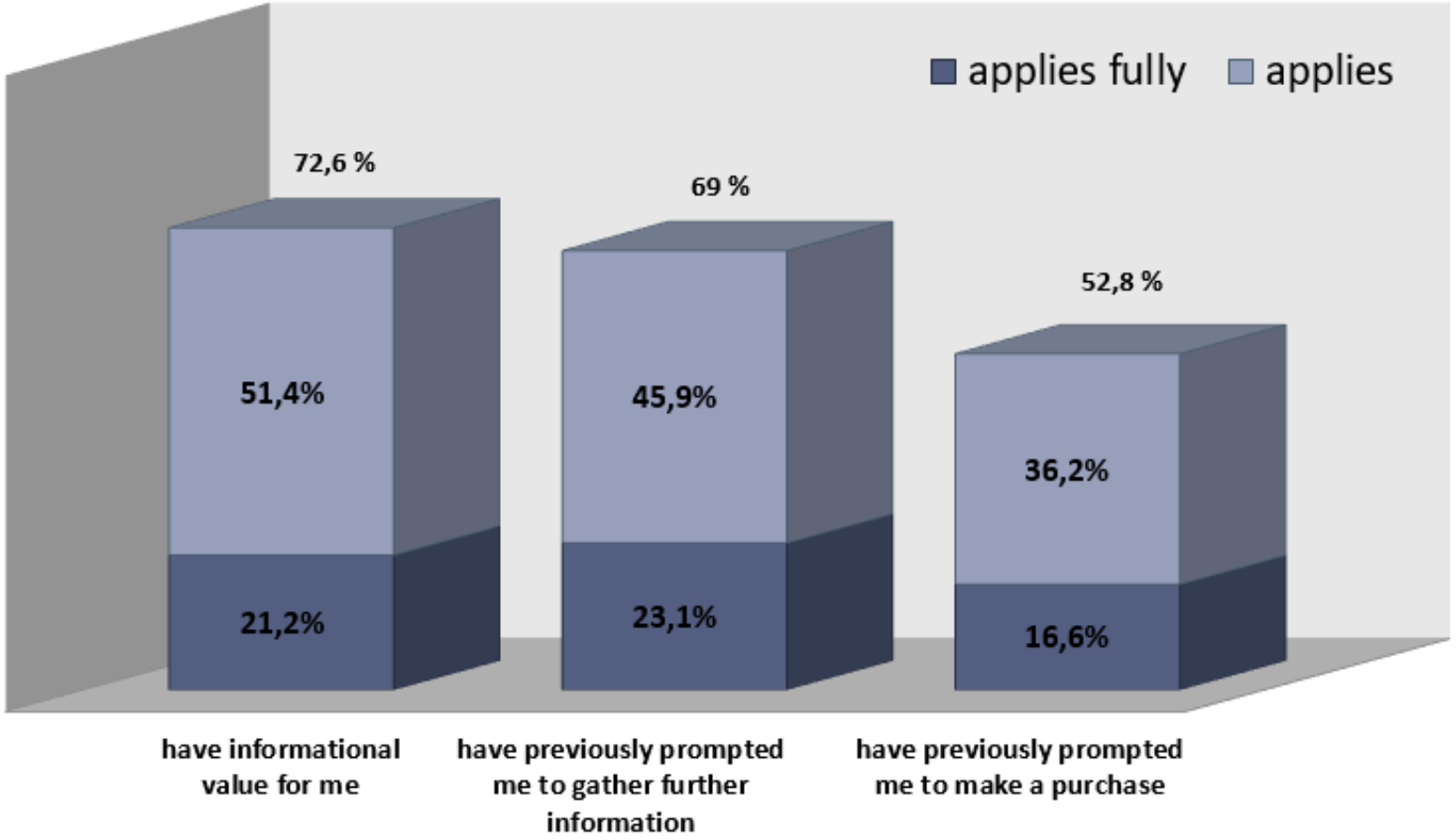
7. Attention to Advertisements

„I read the advertisements and supplements in the magazine“

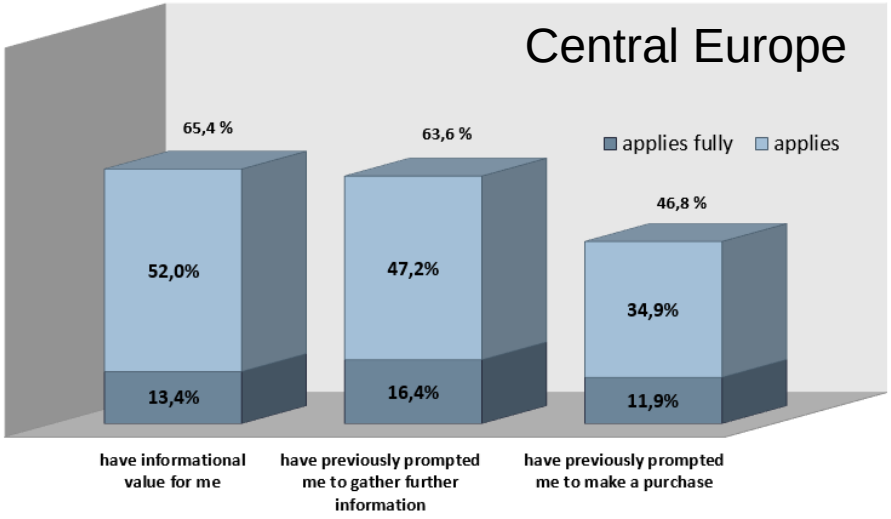


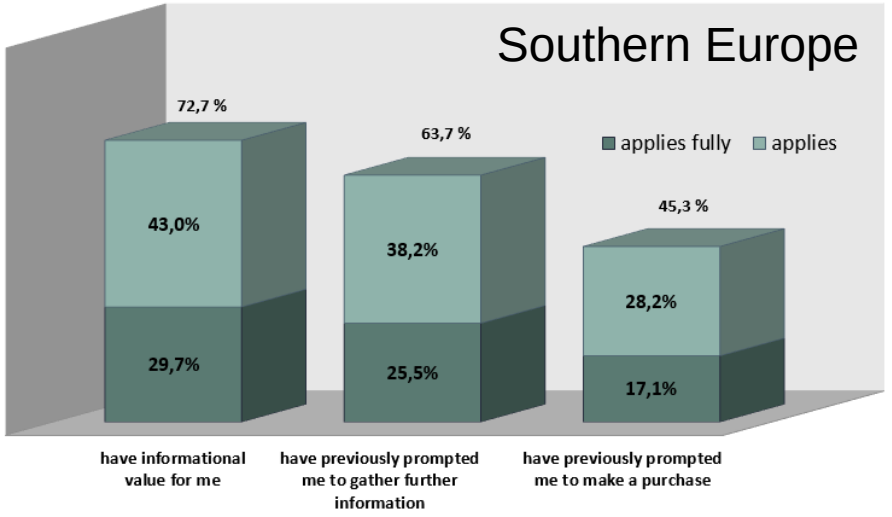
7. Attention to Advertisements

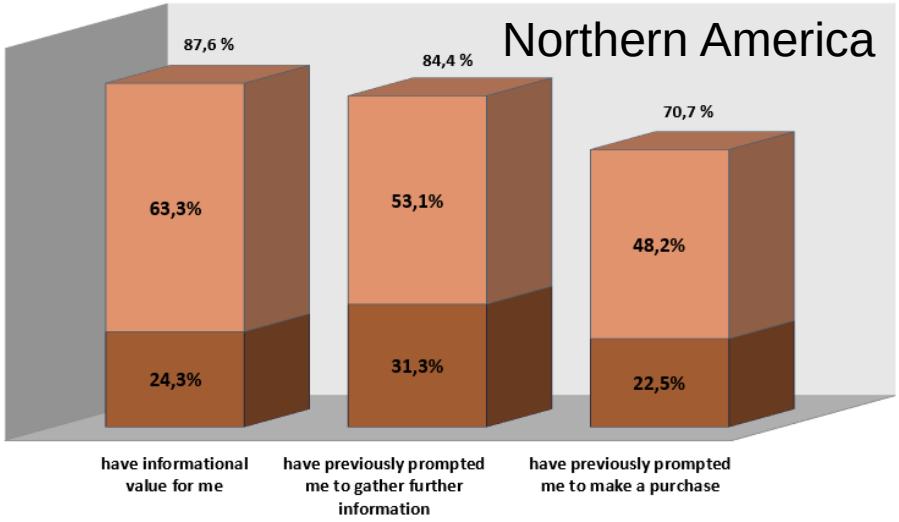
„Advertisements in the magazine ... “

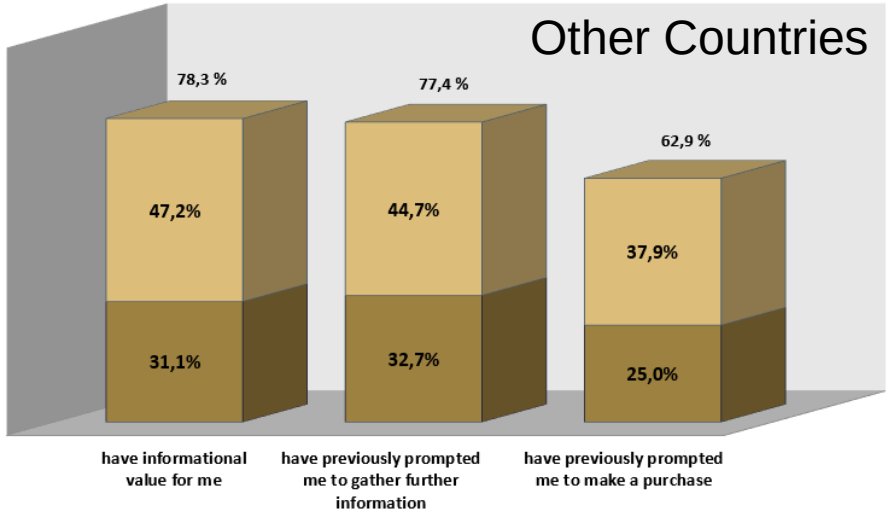


7. Attention to Advertisements By Region









Cologne, 15 March 2017

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