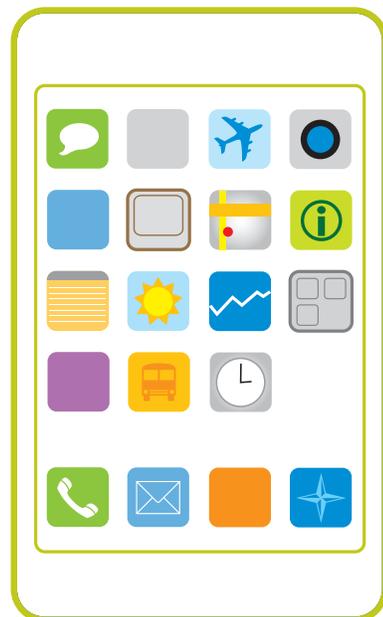


Magazine Media Readers and

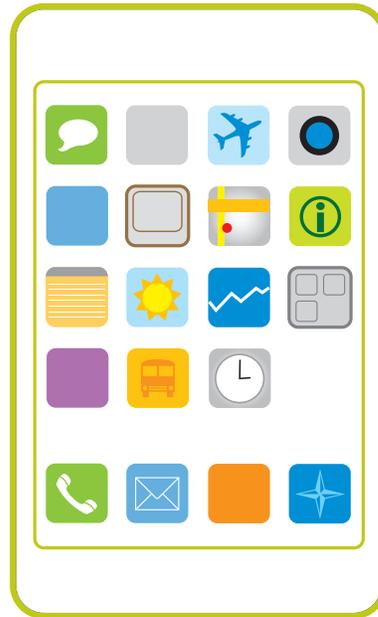
Smartphones



KEY RESEARCH FINDINGS



Magazine Media Readers and Smartphones



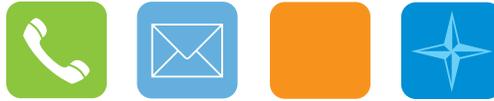
RESEARCH OBJECTIVE

The smartphone is shaping up to be the next frontier for delivering magazine media content. Accordingly, MPA conducted this study to determine the behavior of magazine readers 18–34 who access content on their smartphones. The findings will provide insights for magazine editors and publishers to better understand how consumers are accessing magazine content on their smartphones and to better align content with consumer preferences going forward.



The Association of Magazine Media™

SUMMARY OF RESEARCH FINDINGS



Most magazine readers 18-34 who own a smartphone access or download magazine branded apps using digital newsstands and/or newsreaders.

- 83% of respondents accessed or downloaded a magazine branded app via a digital newsstand with more than one-third using a newsreader.
- Apple iPhones are dominant at 61%, especially among women (64%) versus men (58%) and higher HH income consumers — 70% for \$100,000+ compared to those making under \$50,000 (52%).
- The reverse is true for Android owners. Overall 44% own an Android device with males dominating at 48% versus women at 40% and those under \$50,000 (47%) more likely than those over \$100,000+ HHI (38%).
- On average, 2.6 different magazine apps have been downloaded onto smartphones owned by 18–34 year old magazine readers.
- Food, news and sports magazine apps are the most popular downloads for reading or viewing on smartphones, followed by celebrity/entertainment and science/technology.
- Nearly two-thirds of respondents have been reading or viewing digital content on their smartphones through a magazine-branded app or newsreader for less than six months.
- 86% access digital magazine content on their smartphone from home, with 43% accessing at work and 31% while commuting.
- 61% of respondents spend less than one hour reading or viewing digital magazine content on their smartphone in the typical week. 39% access for one hour or more, with more than half seeing the amount of time with digital magazine content increasing over the next year.
- 60% see their overall readership of printed magazines increasing or remaining the same since they began reading digital magazines on their smartphone.

Accessing magazine content on smartphones leads to action.

- 60% of respondents have visited the magazine's website as a result of reading digital magazine content on their smartphone. Women and those accessing through electronic newsstands are more likely to do so.
- Three in ten recommend the magazine to someone, with those spending one hour or more reading digital content on their smartphones being more than twice as likely to do so.
- 57% prefer the digital edition to be just like the printed magazine, but 60% also said they would like the smartphone version to deliver more current information than the printed copy. Men and those spending more time reading digital magazine content favored "more current information" to a greater degree.

Accessing magazine content on smartphones leads to action. (cont.)

- Respondents would be willing to pay a fixed amount for total access to a magazine's content across any device or platform, including print copies (57% agree). But only one in four are willing to pay any more for the smartphone version than they pay for the printed version, even if it is a more engaging experience. 37% would prefer to pay just for the magazine content that they choose versus an all-access plan.
- While reading a printed magazine 36% of respondents have scanned a QR code in an ad, 31% posted something on Twitter or Facebook that they saw in an ad in the magazine, and 29% took a picture of something in an article or ad.
- More than three quarters feel it important to have the option to share magazine content they are reading with friends; those who download the most and spend the most time reading digital magazine content feel the strongest on this.
- Two-thirds read or tap on advertisements appearing in digital magazines on their smartphones with those reading the most doing it the most.
- Nearly three in ten respondents expressed interest in being able to purchase products and services directly from articles and features that they read in digital magazines on their smartphones; the most avid downloaders and readers responded most positively.
- 65% use QR codes, Microsoft Tags or other links generated by smartphone cameras to respond to ads. Android users and the most avid readers use codes to a greater degree.
- Half subscribe or buy single issues via a newsstand like iTunes or Amazon while 31% have a digital subscription through their print subscription.
- 64% search for specific magazines on their smartphone, 29% look for specific content and then choose the title that's most interesting while 25% check out new digital magazines that they see on e-newsstands.
- The most important features for readers visiting a magazine newsstand on their smartphone are: the ability to easily search for a magazine they were looking for (68%), the ability to buy single digital issues (53%), to be able to read select articles in a magazine before purchasing (48%), access to the table of contents (48%) and the ability to buy single back issues. There were significant differences in most of these by gender, devices owned and those with the heaviest usage.
- 77% say that pictures and photo galleries enhance their experience with digital magazines on their smartphones. Most prefer short videos of less than a minute.
- 65% want to be able to archive an article or entire issue.
- 66% would value the ability to forward an article or issue to someone else, with those having devices the longest and spending the most time reading responding most positively.
- Half would like to see more smartphone newsstands that offer a variety of different magazines to download.
- 63% would like the ability to easily give a digital magazine subscription as a gift. Those downloading the most apps and getting their digital sub through their print sub voted the strongest agreement here.

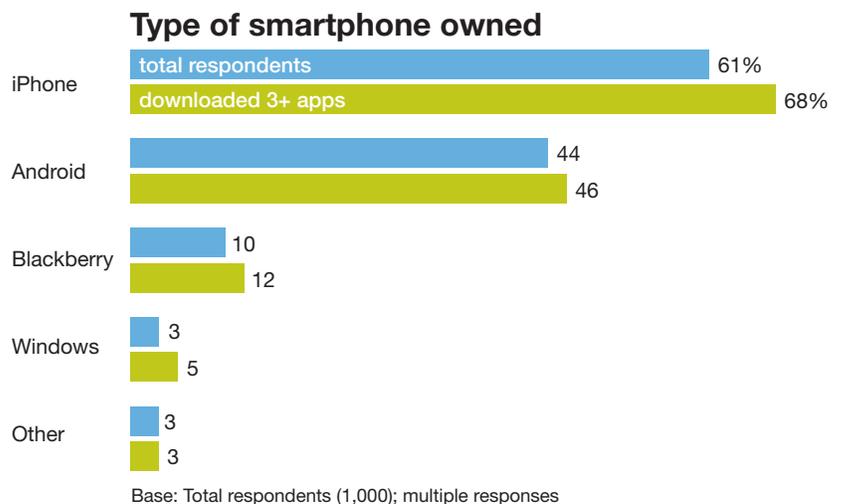
KEY RESEARCH FINDINGS (adults 18–34)



Do you personally own any of the following smartphone devices?

Observations:

- Apple iPhones are dominant, especially among women and higher household incomes.*
- The reverse is true for Android owners. Males and lower household incomes dominate here.



Have you ever done any of the following on your smartphone?

Observations:

- Those who have been reading digital magazine content for more than three months are more than twice as likely to have subscribed to a digital magazine through the magazine's app.*
- Males are more likely to subscribe to digital magazines or purchase single digital copies than are females.*

Smartphone activity

total respondents / **downloaded 3+ apps**

83%	90%	Accessed or downloaded any magazine branded app via a digital newsstand (e.g. iTunes, Amazon, Zinio, Nook)
35	52	Accessed digital magazine content through a newsreader (e.g. Flipboard, Pulse, Zite)
30	53	Purchased a digital magazine through the magazine's app
26	40	Downloaded a magazine branded app that is not a regular issue (e.g. Martha Stewart Cookies, Self Workouts, GQ Style Guide)

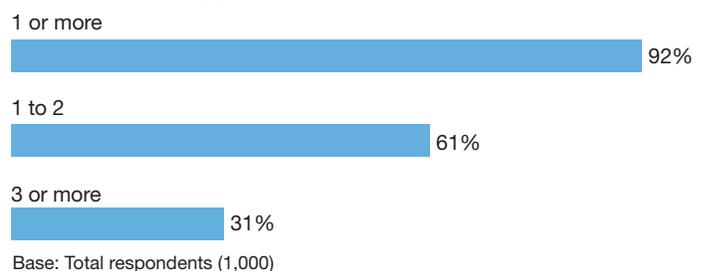
Base: Total respondents (1,000); multiple responses

In total, how many different magazine apps have you downloaded onto your smartphone?

Observations:

- On average, 2.6 different magazine apps have been downloaded onto smartphones owned by 18–34 year old magazine readers.
- Males are more likely to download 3 or more magazine apps.
- Males also spend more time reading digital magazines.

Number of apps downloaded



*See detailed research findings available at magazine.org/smartphonersearch

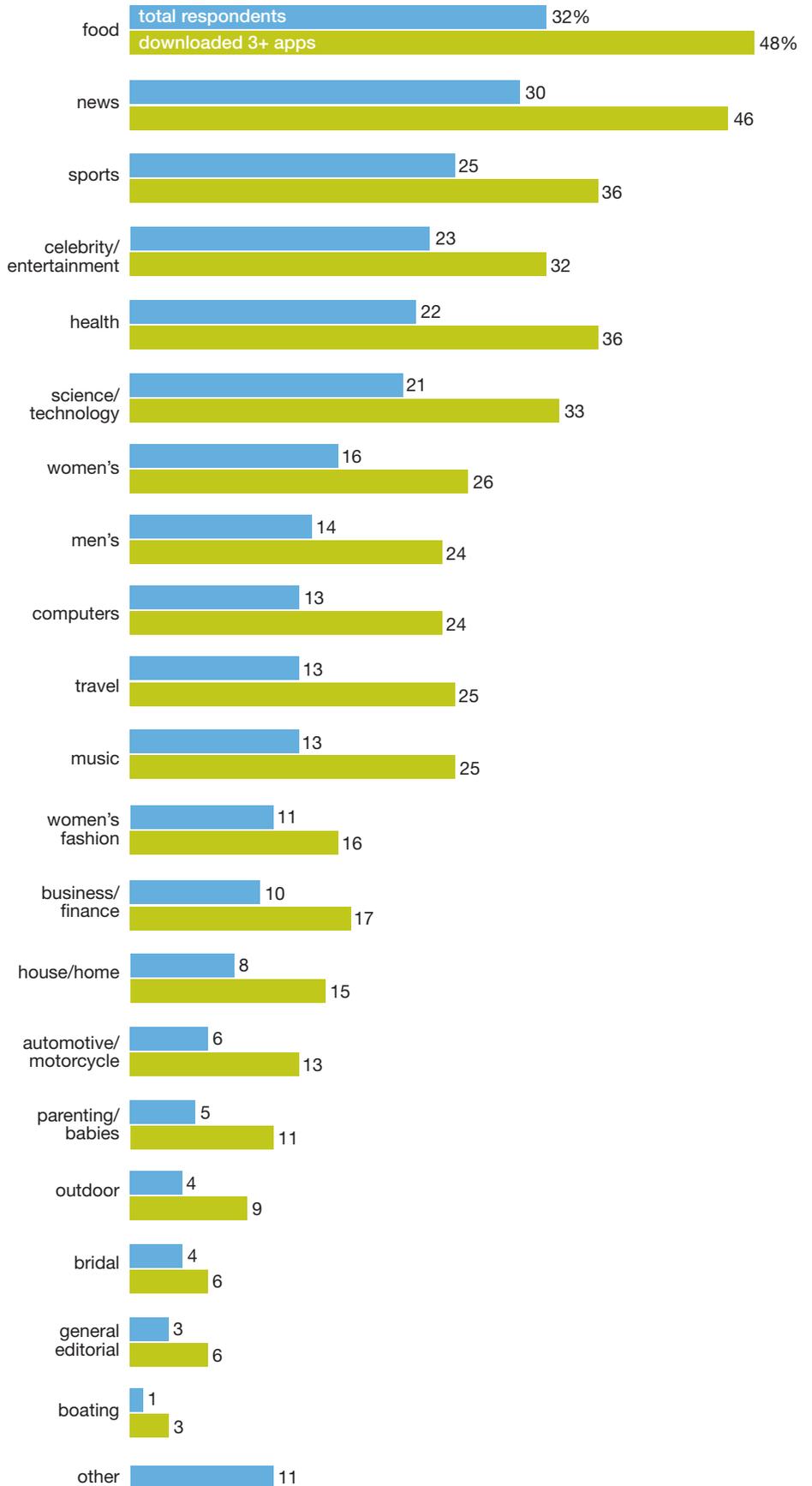


What types of magazine apps have you downloaded to read or view on your smartphone?

Observation:

Food, news and sports magazine apps are the most popular downloads for reading or viewing on smartphones, followed by celebrity/entertainment and science/technology.

Types of magazine apps downloaded



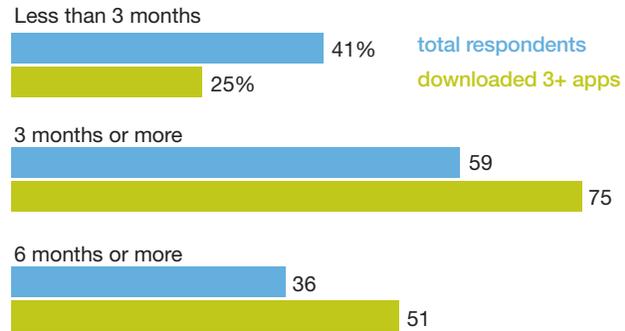
Base: Total respondents (1,000); multiple responses

How long have you been reading or viewing digital magazine content through a magazine-branded app or a newsreader on your smartphone?

Observations:

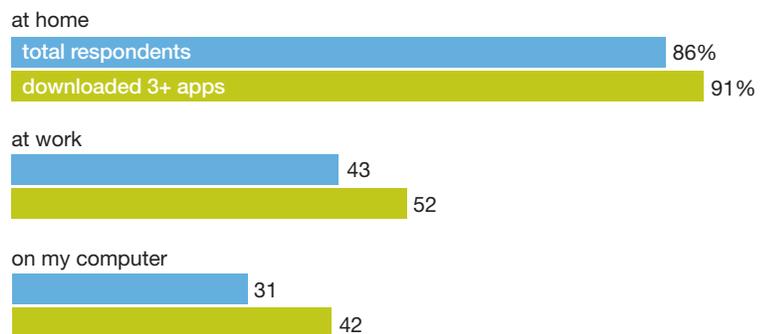
- Nearly two-thirds of respondents have been reading or viewing digital content on their smartphones through a magazine-branded app or newsreader for less than six months.
- Just 3.8 months is the median time that respondents have been reading or viewing digital content on their smartphones, documenting that it is still very early in the adoption curve.

Started reading digital magazine content on smartphone



Base: Total respondents (1,000); multiple responses

Where do you access digital magazine content on your smartphone?



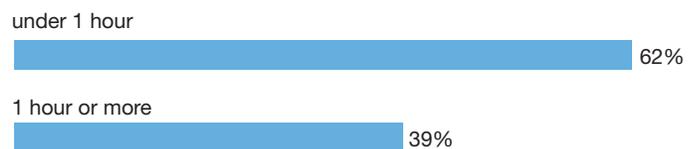
Base: Total respondents (1,000); multiple responses

On average, how much time do you spend reading or viewing digital magazine content on your smartphone in a typical week?

Observations:

- The median time spent reading/viewing digital magazine content is 48 minutes per week, with an average time spent of 80 minutes.
- Men and those in higher income households spend more time reading/viewing than women and lower income households.

Time spent reading magazine on smartphone in a week



Base: Total respondents (1,000)



Over the next year, do you believe that the time you spend reading digital magazines will increase, decrease or stay the same?

Digital magazine readership activity – by segments:

Top two box agreement	Total Res. 1,000	Male 500	Female 500	Own Android 438	Own iPhone 608	Digital issue via newsstand 498	Digital thru print sub. 308
Increase a lot/somewhat	56%	57%	56%	59%	57%	64%	66%

Top two box agreement	Downloaded 1–2 apps 607	Downloaded 3+ apps 311	Digital mag reader < 3 mo. 413	Digital mag reader 3+ mo. 587	Read < 1 hour 615	Read 1+ hour 385
Increase a lot/somewhat	54%	68%	56%	56%	49%	68%

Which of the following statements best describes your overall readership of print magazines since you began reading digital magazines on your smartphones?

Readership activity

total respondents / **downloaded 3+ apps**

60%	46%	I read more/about the same number of print magazines
25	17	I read more copies of print magazines
35	29	I read about the same number of print magazines
33	51	I read fewer copies of print magazines

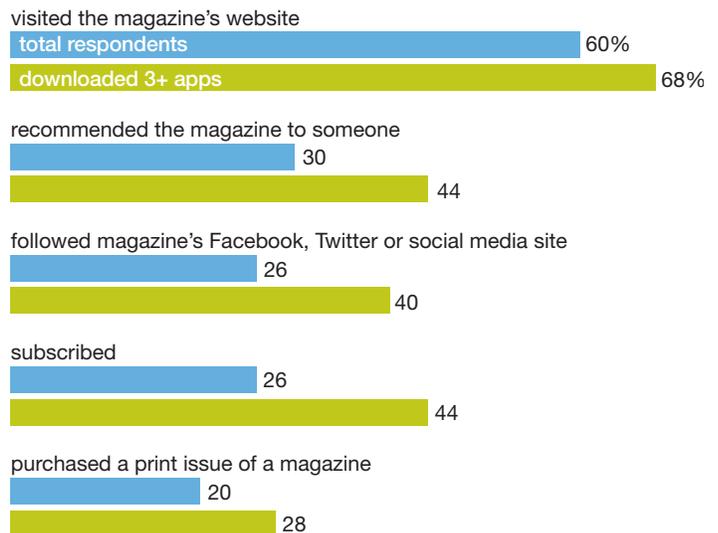
Base: Total respondents (1,000); multiple responses

Which of the following, if any, have you ever done as a result of reading digital magazine content on your smartphone?

Observations:

- Women, and those accessing through electronic newsstands, are more likely to visit a magazine’s website as a result of reading digital magazine content on their smartphone.*
- Males are more likely to subscribe to a digital edition than females.*
- Those spending one hour or more reading/viewing digital content on their smartphones are more than twice as likely to recommend the magazine to someone.*

Readership activity



Base: Total respondents (1,000); multiple responses

To what extent do you agree or disagree with each of the following statements about digital magazines on your smartphone?

Observations:

- More than half of respondents would be willing to pay a fixed amount for total access to a magazine's content across any device or platform, including print copies. But only one in four are willing to pay any more for the smartphone version than they pay for the printed version.
- More than a third would prefer to pay just for the magazine content that they choose versus an all-access plan.
- Men and those spending more time with the reading digital magazine content favored "more current information" to a greater degree.*

Digital magazine activity

total respondents / **downloaded 3+ apps**

60%	64%	I would like the smartphone version of a magazine to deliver more current information than printed copy
57	57	I like a magazine's digital version to be just like the printed magazine
57	58	I would be willing to pay a fixed amount for total access to a magazine's content across any device or platform that I choose to use
28	36	I prefer to download magazine branded apps (e.g. Martha Stewart Cookies, Self Workouts, GQ Style Guide) onto my smartphone rather than a full magazine issue
24	29	I would be willing to pay more for the smartphone version of a magazine than the printed version if it is a more engaging and interactive experience

Base: Total respondents (1,000); multiple responses, top two box agreement

Since you began accessing digital magazines on your smartphone, have you become more engaged with a magazine brand on a social platform such as Twitter or Facebook?

Engagement with magazine's social platform

total respondents / **downloaded 3+ apps**

47%	67%	Yes, overall
36	55	Yes, on Facebook
15	22	Yes, on Twitter
9	15	Yes, on Pinterest

Base: Total respondents (1,000); multiple responses



*See detailed research findings available at magazine.org/smartphonersearch

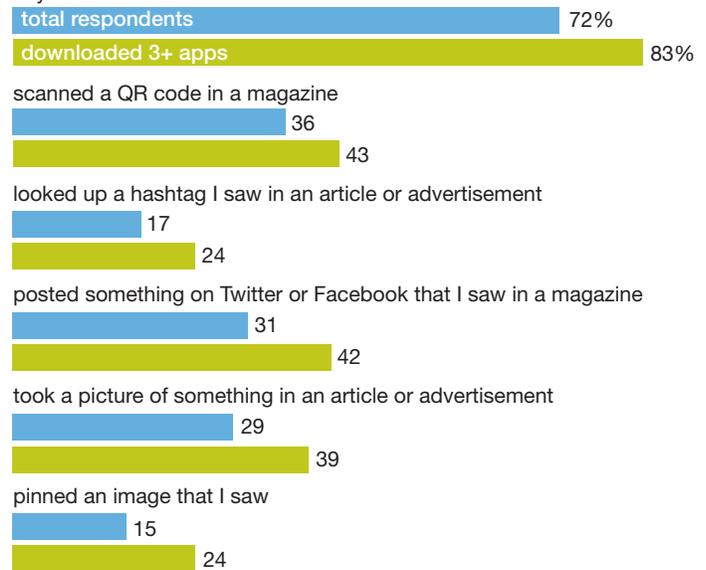
When reading a print magazine, have you done any of the following activities on your smartphone?

Observations:

- Nearly three-quarters of respondents took some action on their smartphone when reading a printed magazine
- Females and Android device users were more likely to take action.*

Smartphone activity/actions taken

any of these activities



Base: Total respondents (1,000); multiple responses

How important is it to be able to have the option to share magazine content that you are reading with your friends?

Observations:

- More than three-quarters of respondents feel it important to have the option to share magazine content they are reading with friends
- Those who downloaded the most and spent the most time reading digital magazine content feel the strongest.

Share magazine content

very/somewhat important



Base: Total respondents (1,000); multiple responses, top-two box agreement

How often do you typically read or tap on advertisements appearing in digital magazines on your smartphone?

Observations:

- Two thirds of readers tap on advertisements appearing in digital magazines on their smartphones
- Not surprisingly, those who read the most, do it the most

Advertisements in digital magazines – by segments:

Base	Total Res. 1,000	Male 500	Female 500	Own Android 438	Own iPhone 608	Digital issue via newsstand 498	Digital thru print sub. 308
Read/act to smartphone ad	66%	69%	62%	68%	66%	72%	77%
Base	Downloaded 1-2 apps 607	Downloaded 3+ apps 311	Digital mag reader < 3 mo. 413	Digital mag reader 3+ mo. 587	Read < 1 hour 615	Read 1+ hour 385	
Read/act to smartphone ad	62%	79%	62%	68%	59%	76%	

*See detailed research findings available at magazine.org/smartphoneresearch

Thinking about responding to advertisements using QR codes, Microsoft tags or other links generated by smartphone cameras, how often, if ever, do you use these?

Observations:

- Nearly two-thirds use QR codes, Microsoft Tags or other links to respond to ads
- Android users and the most avid readers use codes to a greater degree.*

Use links generated by smartphone cameras

regularly/sometimes



Base: Total respondents (1,000)

Would you be interested in seeing articles (in print or digital magazines) with hashtags so you can easily discuss on Twitter?

Use of hashtags in articles

Yes, used a hashtag in an article



No, did not use a hashtag in an article



Base: Total respondents (1,000)

To what extent do you agree or disagree with each of the following statements about the advertising that appears in digital magazines on your smartphone?

Observations:

- Nearly 30% expressed interest in being able to purchase products and services directly from articles and features that they read in digital magazines on their smartphones
- The most avid downloaders and readers responded most positively.

Advertisements in digital magazines

total respondents / **downloaded 3+ apps**

61%	60%	I find that electronic ads are usually pretty annoying
51	57	Electronic advertisements offer the potential to provide more information than a print ad
38	44	Electronic advertisements can be an important part of a digital magazine
22	28	I like engaging with electronic ads on my smartphone
29	38	I am interested in purchasing products and services directly from articles and features that I read in digital magazines on my smartphone
19	28	I am interested in purchasing products and services directly from the advertisements I see in digital magazines on my smartphone

Base: Total respondents (1,000); multiple responses, top-two box agreement



Which of the following statements describes the ways in which you have purchased digital issues of magazines on your smartphone?

Observations:

- Half subscribe or buy single issues via a newsstand like iTunes or Amazon
- Nearly a third have a digital subscription through their print subscription

Purchase of digital issues of magazines

total respondents / **downloaded 3+ apps**

50%	57%	I subscribe or buy single issues via a newsstand (e.g. iTunes, Amazon, Zinio, Nook)
31	44	I have a digital subscription through my print subscription
27	15	I haven't purchased a digital magazine on my smartphone

Base: Total respondents (1,000); multiple responses

How do you find new digital magazines to read on your smartphone?

Observations:

- Nearly two-thirds search for specific magazines on their smartphone
- Those who have been doing it the longest spend the most time doing it and download the most apps. They are also most likely to search for specific magazine titles on their smartphones.*

Digital magazine search

total respondents / **downloaded 3+ apps**

64%	71%	I search for specific magazines I already have in mind
29	32	I look for specific types of content and then see which magazines look the most interesting
25	41	I check out new magazines that I see featured in the Amazon, Nook or Apple newsstand
19	17	I look at the covers and coverlines to see what looks the most interesting
16	26	I check out new magazines that I see featured in a newsreader

Base: Total respondents (1,000); multiple responses

Which of the following features would be most important to you if you were visiting a magazine newsstand on your smartphone?

Observations:

- Improved searching capabilities and the ability to buy single digital issues are paramount
- Women and Android users value both of these to a greater degree.*

Magazine newsstand on smartphone

total respondents / **downloaded 3+ apps**

68%	68%	The ability to easily search for a magazine I was specifically looking for
53	53	The ability to buy single digital issues of a magazine
48	53	The ability to read select articles in a magazine before I decided to purchase the issue
48	52	Access to the table of contents so I could see everything that was featured in that issue
34	35	The ability to buy single back issues of a magazine
27	32	The opportunity to search for new magazines that I wasn't familiar with based on my own personal interests
23	28	The ability to subscribe to the printed version of the magazine
20	21	The ability to give a print or digital subscription to someone as a gift
9	13	The ability to see videos of the magazine's editor telling me a little bit about the magazine

Base: Total respondents (1,000); multiple responses

*See detailed research findings available at magazine.org/smartphoneresearch

Some magazines have apps that are advertised as ‘free,’ but after downloading the app you are asked to pay a price to access an issue or view content. Which of the following statements best describe how you feel about this?

Observation:

- Most find the practice of downloading a free app holder to then purchase an issue or view content as confusing and misleading.

Magazine apps

total respondents / **downloaded 3+ apps**

79%	73%	It's confusing and the magazine should tell you up front what the real cost is
21	27	It's no big deal, I can always decide if I want to pay or not after I've downloaded the app

Base: Total respondents (1,000)

To what extent do you agree or disagree with each of the following statements about digital magazines on your smartphone?

Observations:

- More than three quarters agree that pictures and photo galleries enhance the reading experience.
- Two thirds want to be able to forward an article or issue to someone else.
- Those having devices the longest and spending the most time reading responded most positively to the opportunity to share articles or issues with others.*

Magazine newsstand on smartphone

total respondents / **downloaded 3+ apps**

77%	79%	Pictures and photo galleries enhance my experience
65	68	I want to be able to archive an article or entire issue
66	68	Having the ability to forward an article or issue to someone else would be a plus
60	64	I prefer short videos (less than one minute) rather than longer videos
50	56	I would like to see more smartphone newsstands that offered a variety of different magazines to download
42	50	I would like to see more videos in the magazines on my smartphone
37	39	I prefer to pay just for the magazine content that I choose to access vs. an all access plan
36	44	I would like more music content in the magazines on my smartphone

Base: Total respondents (1,000); multiple responses, top-two box agreement

Would you like the ability to easily give a digital magazine subscription as a gift?

Observations:

- Most would like the opportunity to easily give a digital magazine subscription as a gift.
- Men, those married and doing it the longest, spending more time doing it and downloading more apps voted the strongest agreement for gift giving.*

Offer a magazine subscription as a gift

Yes, would like to offer digital magazine subscription as gift



No, would not like to offer digital magazine subscription as gift



Base: Total respondents (1,000)



Magazine Media Readers and Smartphones

GfK MRI, an independent media research firm, was commissioned by The Association of Magazine Media (MPA) to conduct a study among adults 18–34 who own a smartphone and have used it to access any magazine content.

Respondents were recruited to the online survey via an email invitation sent to members aged 18–34 of the Research Now panel. The study was fielded from June 27 to July 2, 2012. A total of 1,000 respondents completed the survey. The initial results yielded a 35% Male/65% Female split, leading to a re-fielding of the survey from July 19 to July 22 to acquire an additional 234 male respondents. Female respondents (500) were randomly selected to achieve a total of 1,000 completed surveys with a 50/50 split between males and females.

The data are presented for total respondents and also by age 18–24 and 25–34, gender (male and female), devices owned (Android, Apple iPhone), number of apps downloaded (1-2 and 3+), length of time reading digital magazine content (less than 3 mos. and more than 3 mos.), time spent reading digital magazine content (less than one hour/one hour or more) and how digital edition was purchased (via e-newsstand and digital subscription through a print subscription).

Questions included the following areas of inquiry:

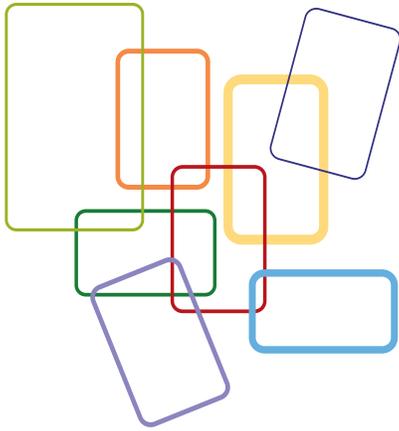
- Ownership of various smartphone devices
- Forms of access or downloading of magazine content
- Number of different magazine apps downloaded to smartphone
- Types of magazine apps downloaded to smartphone
- Length of time or viewing digital magazine content through app or newsreader
- Where digital magazine content is accessed via smartphone
- Time spent reading/viewing magazine content via smartphone in typical week
- Expectation over next year as to time spent reading magazines via smartphone
- Readership of printed magazines since began reading digital magazines
- Actions taken as a result of reading digital magazine content on smartphone
- Level of agreement on statements about digital magazines on smartphones
- Magazine brand social engagement since accessing digital magazines
- Activities done on smartphone while reading a printed magazine
- Importance of having the option to share magazine content with friends
- Frequency of reading or tapping on ads in digital magazines via smartphone
- Level of agreement with various statements regarding digital advertising
- Frequency of responding to ads using QR codes, tags or other links
- Interest in seeing articles with hashtags for ease in discussion on Twitter
- Ways of purchasing digital issues of magazines on smartphones
- Ways of finding new digital magazines to read on smartphones
- Importance of various features if visiting a magazine newsstand on smartphone
- Level of agreement with statements about digital magazines on smartphones
- Interest in the ability to give a digital magazine subscription as a gift

Noteworthy observations are provided as bullet points throughout.

MPA Benchmark Research

MPA has conducted three platform-specific studies on the magazine media reading experience.

Visit magazine.org for the full studies.



Magazine Media Readers and Tablets

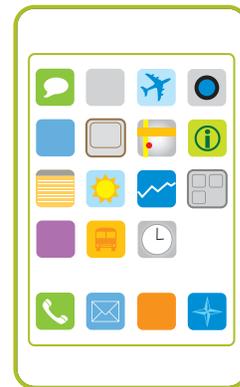
Discover the impact on magazine readership, engagement and actions taken after reading.

magazine.org/tabletresearch

Magazine Media Readers and Smartphones

Realize the power of the small screen on content engagement and actions taken after reading.

magazine.org/smartphonersearch



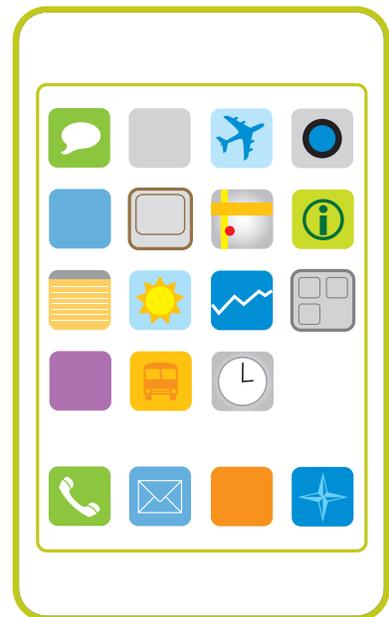
Magazine Media Readers are Social

Learn how reader socialization is impacting engagement with edits and ads.

magazine.org/socialresearch



The Association of Magazine Media™



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