

Magazines and tshe Tablet Interface

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The Tablet Interface: Introduction

When the mouse was first introduced, it revolutionized the way people interacted with computers. The most recent revolution in computer interaction was the introduction of touchscreen interface technology. This is not to say that touchscreens are new, as they have been around for quite a while. Instead, they have become much more common today with the increasing popularity of mobile devices such as the Apple iPhone and Google Android phones, which started the movement towards portable touchscreen devices. More recently, portable tablet computers such as the Apple iPad and its competitors (including devices by Research in Motion, Hewlett Packard, and more to be released in the near future) have taken portable touchscreen devices to the next level with larger screens than their smartphone predecessors. This new interface has opened the door for new and innovative kinds of entertainment and information that competes with printed material—the dominant method of delivering stories and publications today. This study asks the question: How will the introduction of portable tablets with touchscreen interfaces affect the magazine printing industry?

There have been many advances in technology that have threatened print publications in the past, but tablets are a more potent threat. The technological advances of the past have always had the disadvantage of being less portable or having a less user-friendly interface. Tablets, however, have seemed to rectify these problems. For example, the iPad revolutionizes the way that people read magazines. *WIRED* magazine now circulates an iPad version of its publication, including all of the visual elements that appear in the printed magazine. In addition to page layouts similar to their printed

counterparts, the virtual version of the magazine also includes interactive elements such as videos and 360° views of products. Most importantly, it has touch interaction—meaning that rather than controlling the digital interface with a mouse or a keyboard, users control it with the touchscreen—a crucial element to making e-magazines feel more like a printed product. The ability to interact with an e-magazine by touch gives it the advantage of feeling natural to the user. Readers don't need to learn how to use the e-magazine like people need to learn how to use computers; it is intuitive. This means that, with portability and interface on par with printed material and the benefit of interactivity, tablets give electronic publications a distinct advantage over printed publications. Unless printed magazine publishers come up with significant advancements to counter the threat of tablets, they could eventually be taken over by electronic versions.

The goal of this study was to determine what effect the newly popularized medium of personal tablets has on the magazine industry. Studying the past, conducting experiments on current consumers and using that data to predict the future has allowed me to achieve this goal. This study looked at past attempts to make the magazine go digital such as e-magazines viewed on computers, phones, and e-readers to see what obstacles personal tablets have to overcome. This study had the benefit of watching the situation as it unfolded. As more and more magazines published iPad/Tablet compatible versions of their publications, it was interesting to see and document the way people embraced tablets as a new way to get news and entertainment or dismissed them as just another fad. This study also went to higher, more reliable sources in the industry to get

hypotheses about where the industry is going. With all of this data collected, the study analyzed the facts and numbers to form a statement about the impact personal tablets will have on the magazine industry.

The Tablet Interface: Literature Review

Since portable tablets were only beginning to become popular at the time of this study, there was not a lot of research on the effects tablets have on printed material. However, there were studies on the affects of Internet-based competition's effect on the printing industry as well as that of e-readers, both of which are very similar to portable tablets. The Internet, as we use it today, is exactly the same as we see it on portable tablets. The only difference is the touchscreen interface. E-readers are also very similar to portable tablets in size and portability. Most e-readers, however, do not display color and are not backlit, and none of them have touchscreens. Looking at the effects of e-readers and Internet news on the printing industry can create an effective backdrop for new technology interrupting printed publication dominance. The impact of the iPad was also a great avenue to see the benefits and drawbacks of tablets as a medium for magazines as they unfold. To make predictions about what effect portable tablets will have on the printing industry, I have studied the effects of e-readers on printed books, Internet news on newspapers, e-magazines on printed books, and current developments with the iPad to give me insight into the future of the magazine industry.

The impact of technology on the book printing industry has already been seen at the time of this study. Through e-readers such as Amazon's Kindle and Barnes and Nobles' Nook, readers have been given the choice between printed books and digital alternatives. The trend over the past years has shown significant growth in e-book sales. The Association of American Publishers (AAP) reports that sales of e-books in the United States have increased by an average of 71 percent each year from 2002–2009

while trade books—books intended for general readership—have grown by an average of 1.8 percent. Sales of e-books increased 173 percent from 2008–2009. This being said, e-book sales were still dwarfed by trade book sales. E-books sold about \$315 million while trade books sold slightly over \$8 billion in 2009.¹ Another place to look that shows the growth of e-books is Amazon. According to “How the iPad Impacts”, an article by Cary Sherburne, 6 out of every 10 books sold on Amazon are Kindle versions of those books.² This number was growing, as only 35 percent of Amazon’s books were sold in Kindle form “not too long ago.” The reason given by Sherburne for the iPad’s success is its main purpose of consumption rather than creation. The problem with computers is that they are made with good interfaces for creating—writing, multimedia, coding—but they are forced to be a source for consumption as well. iPads and Kindles, on the other hand, are made for the sole purpose of receiving content. This made them perfect for being e-readers because they are less distracted from their purpose than computers.²

The most obvious form of technology affecting print publications is the Internet, which wreaked havoc on the newspaper industry. By 2006, the newspaper industry was literally shrinking. In his article, “Newspaper Companies Put the Squeeze on Print”, Matthew Schwartz writes about newspapers having to shrink the size of their newspapers to save on costs. The Wall Street Journal and the Washington Post both

¹ See Appendix A

² Sherburne, Cary. “How the iPad Impacts.” Printing Impressions. 1 Mar. 2010: ABI/INFORM Global, ProQuest. Web. 4 May. 2010.

had to decrease the physical size of their papers to reduce printing costs.³ Some publications, such as the New York Times, offered some of the content that was omitted due to shrinkage online for a cost to give their readers the same amount of information and to draw them to the electronic version as well. The mistake that the newspaper industry made was not charging for online content earlier. Readers became accustomed to free news, and saying that information wants to be free became the dominant opinion of a generation. In “Pay for Online Newspaper? Hah!”, an article by Mark Dolliver, the author cites a poll about newspaper readership and willingness to pay: 72 percent of the individuals polled read a newspaper, either online or in print, at least once a week. The same poll found that 77 percent of those polled would not be willing to pay for online news content.⁴ This shows that the population didn’t stop reading the news; it simply switched the medium that its news comes from. It is up to the newspaper industry to find a way to keep their customers by adapting to changing technology.

The magazine industry seems to be the next logical component of the publication industry that is going to be affected by technology. Magazines have already been affected by the Internet much in the way that newspapers have. The industry as a whole is in decline according to “A Cautious New Year”, an article about the shaky nature of the past year for magazines and what was being done to solve the problems that the

³ Matthew Schwartz. “Newspaper Companies Put the Squeeze on Print.” B to B, 8 May 2006: ABI/INFORM Global, ProQuest. Web. 4 May. 2010.

⁴ Dolliver, Mark. “Pay for Online Newspaper? Hah!” Brandweek. 11 Jan. 2010: ABI/INFORM Global, ProQuest. Web. 4 May. 2010.

industry is having. With increasing postal rates and a decline in ad revenue, publishers were trying many things to improve returns on investment and customer loyalty. RR Donnelley developed a program called DigiMag 6.0 to convert existing PDFs into dynamic online digital publications—e-magazines. Although there were moves being made towards online publications, the main focus is still on print, with the publication companies trying to find the perfect balance between print and online.⁵ Although they are pressing advertisements for their printed magazine, Time magazine was also one of the first companies to launch an iPad application.⁶ The magazine industry is hoping to learn from mistakes made by the book and newspaper industries to make the transition into digital smoother. By offering bundles of digital, print, and mobile products, publications encourage brand loyalty as well as showing the benefits of being paying customers.

Studying the past can provide a great window into the future, and portable tablets are no exception. By looking into the past at the effects of online news, e-readers, and e-magazines, the future of electronic publication has become clearer. These past events have been building up to a transition in the way we get our news and entertainment, one that will soon be realized with portable tablets. One study, conducted by the Audit Bureau of Circulation (ABC), gives a clearer picture of the recent trends in printed magazines. This set of statistics compiled by ABC reported the circulation numbers for

⁵ Greenbaum, Julie. "A Cautious New Year." Printing Impressions. 1 Dec. 2009: ABI/INFORM Global, ProQuest. Web. 4 May. 2010.

⁶ "Business: Loving touch; Magazines and CDs get luxurious." The Economist. 10 Apr. 2010: ABI/INFORM Global, ProQuest. Web. 4 May. 2010.

the top 100 magazines—by circulation—over the past 40 years [See Appendix B]. It detailed single-copy circulation as well as subscription circulation. What this chart shows is that, while total magazine circulation has been up and down—mostly down between 2000 and 2009—subscriptions have been on the rise. Only single-copy circulation was consistently decreasing between 2000 and 2009.⁷ This could indicate that the increasing popularity of mobile devices and Internet sources has cut into the desire of people to pick up magazines at the newsstand when they could just as easily get the information online. It could also reflect the consumer population's desire to save money, being that subscriptions are generally cheaper per issue than single-copy purchases.

Although technology and the Internet have already undoubtedly made an impact on the printed material, they do not necessarily have to be competing. An article in *Quality Magazine* quotes Cathie Black, president of Hearst Magazines, where she states that the debate between digital and print magazines is “not an ‘either-or’ proposition... it’s both.”⁸ What she means is that people often pit digital and print editions against each other as direct competitors, when in fact they can work together to benefit the publisher. Magazines such as *Cosmopolitan*⁹, *WIRED*¹⁰, and *ESPN the Magazine*¹¹ all had extensive online editions of their magazines in 2009, yet their print sales are expanding

⁷“Historical Subscriptions/Single Copy Sales.” *Audit Bureau of Circulations*. Web. June 3rd, 2010 <http://www.magazine.org/CONSUMER_MARKETING/CIRC_TRENDS/1318.aspx>.

⁸“The ‘How’ of Quality.” *Quality*. 1 Apr. 2010: ABI/INFORM Global, ProQuest. Web. 2 Jun. 2010.

⁹*Cosmopolitan*. Web. June 3rd, 2010 <<http://www.cosmopolitan.com/>>.

¹⁰“Magazine.” *WIRED*. Web. June 3rd, 2010 <<http://www.wired.com/magazine/>>.

¹¹*ESPN the Magazine*. Web. June 3rd, 2010 <<http://insider.espn.go.com/insider/magazine/index>>.

as well¹². This shows the ability of print and web editions of magazines to work hand in hand rather than exclusively from each other.

In addition to looking into the past to predict future trends, the timing of this study allowed for gaining expert opinions on uses for the tablets as they develop. New and creative uses for portable tablets are being developed frequently and these innovations gave insight into the future impact that portable tablets will have on the publication printing industry. Some of the most relevant developments are e-books and “digi-books.” E-books were nothing new in 2010. Digital versions of books have been available for years online and e-readers such as the Amazon Kindle and Barnes and Noble Nook had been consistently growing in popularity over the past few years.¹³ But there are different possibilities for tablets than for electronic paper e-readers such as the Kindle and Nook. Disney was one company looking to take advantage of the iPad for making what they call “digi-books,” children’s books that are interactive and animated.¹⁴ Some examples of digi-books that had already been created in the spring of 2010 were iPad apps “Alice” and “Toy Story Read-Along.” These children’s books included touch, animation and interactivity.

¹² “Circulation for all ABC Magazines” Audit Bureau of Circulations. Web. June 3rd, 2010 <<http://www.magazine.org/ASSETS/FB4FAE645D5E46EAA7E4233DCE11EB55/2009FYALLABCCIRC.xls>>.

¹³ Sherburne, Cary. “How the iPad Impacts.” Printing Impressions. 1 Mar. 2010: ABI/INFORM Global, ProQuest. Web. 4 May. 2010.

¹⁴ Garrahan, Matthew. “Disney Chief Hails Potential of iPad.” Financial Times. 10 Feb. 2010, ABI/INFORM Global, ProQuest. Web. 10 May. 2010.

This look into studies and events of the past painted a portrait of the magazine's situation today. The movement of books toward portable electronic versions had already made a dent in the book printing industry, and could serve as a warning for the magazine industry. The printed newspaper's plight is another caution to magazines about what could happen if technology encroaches too far into their territory. The magazine is a whole different animal, and although the industry was floundering slightly, adjustments were already being made. The numbers revealed that the magazine subscription trend was not in the red and the printed magazine was very much alive. Magazine publishers were successfully using new and traditional magazines to convey information simultaneously, adapting to technological change far better than books or newspapers did. However, personal tablets posed a new threat entirely, as their content was even closer to the original printed version, and even added a few bells and whistles. The magazine's environment was a complicated one, and one that could go many directions in its future.

The Tablet Interface: Research Methods and Procedures

To determine the size of the threat posed by tablets to the magazine industry, this study employed interviews, research, surveys, and content analysis. Predicting the future of an industry in a field such as magazines can be a very subjective task. This made the researching process much different than it would be for a more scientific subject of research. Different methods had to be used to research the topic and find solutions to the question at hand. One method used to research magazine publishing in print versus digital was to ask industry professionals in Elite and Specialized interviews. The interviewees are experts on the subject since they are heavily involved in transitioning and adapting to a new digital magazine market. Two more methods of research that go hand in hand are historical and descriptive research. By looking at data and statistics from the past for historical research as well as surveying a variety of people for their opinions on digital and print versions of magazines for descriptive research, predictions can be made about what changes will come about as a result of digital magazines for portable tablets. Another method of research necessary for this subjective topic is content analysis. Content analysis is a method of turning data into predictions. Using content analysis, the qualitative research from the previously used methods—interviews, historical research, and surveys—can be turned into solid, quantitative data that will support a prediction for the future of the magazine industry. (Levenson)

A valuable way to determine the impact of portable tablets on the magazine industry is speaking with experts in the business. Through Elite and Specialized interviews, the unique opinions and insights of industry professionals can be gathered to bolster the knowledge gained from the literature review. Elite and specialized interviewing differs from surveys and general interviewing because of its format. Rather than using questionnaires or standard interviewing techniques, Elite and Specialized interviews acknowledge the fact that the interviewees are not just the average consumer. Because of this recognition, the interviewing procedure is tailored to the specific interviewee. The interviewer needs to prepare and ask open-ended questions that are open to revision and expansion as the interview and research continues. An important part of this is coming into the interview with a strong knowledge base on the topic so as to be able to talk conversationally with the interviewee. A good Elite and Specialized interview should seem more like a conversation about the topic at hand than a formal interview. Lewis A. Dexter, the creator of the Elite and Specialized interviewing technique, outlines six steps to a good interview. They are as follows: Open the interview with a general question, avoid leading questions, avoid “why” questions, avoid “either/or” and “yes/no” questions, accept the interviewee’s definition of the situation, and give the interviewee the sense that their input is very important to the study. (Levenson)

Speaking with people involved in the magazine industry is vastly important to figuring out what impact portable tablets will have on the printed magazine. Getting inside

opinions on what needs to be done for tablet magazines is crucial to learning when or if the tablet is a viable alternative to print. The interviewee will be asked questions based on the conversation, as is the nature of Elite interviewing, but the main question at hand will be: How, if at all, do portable tablets change the magazine industry? The interviewees that this study was able to speak with at Time Inc. were Tyler Imoto, the Lifestyle Group's Ad Operations manager, and Peter Meirs, Director of Alternative Media Technologies. Imoto's insights into the advertising side of newspapers were invaluable to giving the study knowledge of how the majority of a magazine publisher's revenue is made: advertising. Meirs had valuable opinions and insights into the creation of digital magazines as well as predictions about the future of magazines on tablets.

Looking at historical research that documented United States consumers' magazine reading habits as well as their views on tablets was another important part of determining the portable tablet's impact on the printed magazine. Historical research involves knowing the trends of the past to give clues as to what will happen in the future. The handicap that historical researchers have compared to other researchers is that they have no control over the studies from which they gather information and have no opportunity for follow-ups. (Levenson)

Historical research was extremely useful for finding facts and numbers about the magazine industry that would have been impossible to collect with the resources available to this study. By finding information about the magazine consumer market,

this study was able to deduct how the market will react to tablet magazines. This study looked to a handbook created by the Association of Magazine Media for statistics on the magazine-reading community. By picking relevant facts from the sections covering magazine readership, circulation, and e-reading, this study was able to paint a detailed picture of the magazine sales environment into which tablet magazines are entering.

Another type of research that is valuable for predicting the future is descriptive research. Surveys fill in areas that cannot be covered by historical research. These are often the same types of research that were studied in historical research, but the parameters are determined during the time of the study rather than during a different study. The type of survey that is most useful for this study is a sample survey of tangibles. This kind of survey takes ideas and opinions from a sample group of individuals/companies and make inferences about the population as a whole.

(Levenson) To look even further into the wants and needs of magazine readers, this study took two different surveys. On a larger scale, the study asked a large pool of survey respondents—just over 200 of them—about their views on tablets, magazines, and magazines for tablets. The study also gave a smaller pool of testers the opportunity to use and compare tablet and print editions of two magazines: *TIME* and *WIRED*.

The first survey conducted was the larger of the two, and was conducted on surveymonkey.com so that it would be able to reach a broader audience. This survey was meant to gather opinions from an audience of respondents that only knew what magazine publishers and tablet makers told them via advertisements, or what the

respondents heard from others around them. This survey was meant to gauge not only customers' awareness but also their responsiveness to printed magazines and magazines on tablets. The survey was conducted on surveymonkey¹⁵ and invitations were spread for it via Facebook and personal emails. The questions addressed three main topics—tablets, magazines, and magazines for tablets. This was meant to define which areas were problematic to magazines advancing significantly into the tablet platform. The questions asked on this survey were as follows:

- 1) Do you own an iPad or other portable tablet (Samsung Galaxy Tab, Archos 7, etc)?
- 2) Have you ever used an iPad or other portable tablet?
- 3) How much would you be willing to pay for a portable tablet (iPad or similar)?
 - a. under \$200
 - b. \$200-400
 - c. \$401-600
 - d. \$601-800
 - e. more than \$800
- 4) Choose the answer that best describes when you will buy a tablet.
 - a. less than a year
 - b. less than 2 years
 - c. less than 4 years
 - d. more than 4 years
 - e. never
- 5) How many magazines do you subscribe to?
 - a. 0
 - b. 1-2
 - c. 3-5
 - d. more than 5
- 6) How often do you read magazines?
 - a. never
 - b. once a month
 - c. 2 or 3 times a month
 - d. once a week

¹⁵ See appendix A for screenshots of the survey.

- e. more than once a week
- 7) Would you buy magazines for a portable tablet (assuming you owned one)?
 - 8) How much would you be willing to pay per issue?
 - a. less than \$2.00
 - b. \$2.01-3.00
 - c. \$3.01-4.00
 - d. \$4.01-5.00
 - e. \$5.01-\$6.00
 - f. more than \$6.00
 - 9) If you owned a portable tablet, would you rather subscribe to a magazine on that tablet or as a printed version?
 - 10) Gender, Age, Occupation (fill in the blank)

This section of questions gathered solid data from the research. This collected data was converted into charts that showed trends pertaining to preferred prices and preferences that users had for tablet and print magazines.

Using the surveying method of descriptive research, impartial consumers will compare digital and print versions of magazines. The survey will be administered to each survey-taker by the researcher on a one-on-one basis due to materials constraints—the study will only have access to one iPad/e-reader at a time. The key demographics for the survey will be based on the demographics for the magazines being administered. After experiencing both versions of the magazine, consumers will fill out a survey about what they like about each version and which version they would most likely buy. The questions on the survey will ask the subjects qualitative questions such as:

- 1) Do you have an iPad?
- 2) If no, what is keeping you from buying one? [You may circle more than one answer]

- a. price
 - b. weight
 - c. backlighting
 - d. not enough features
 - e. other:_____
- 3) How much would you pay for a single copy of this iPad magazine? Printed magazine?
Subscription?
 - 4) Which version of the magazine did you find easier to navigate (Print/tablet)? Why?
 - 5) Which version of the magazine did you like the advertisements in better (Print/tablet)?
Why?
 - 6) Which version of the magazine did you enjoy the articles/content in most
(Print/tablet)? Why?
 - 7) Which version of the magazine did you enjoy more overall (Print/tablet)? Why?
 - 8) Other comments

These questions aided in discovering which medium readers preferred each magazine in, and why. The testers answered with some specific attributes that they liked about each version of the magazines, which gave valuable information about which specific magazine features were popular and which ones weren't.

After all of the research was done, content analysis was used to put all of the pieces of the puzzle together. Content analysis helped the study to draw conclusions from all of the pieces of information gathered using Elite and Specialized interviewing and historical and descriptive research. According to Bernard Berelson, a communication researcher, there are four key words that should be associated with content analysis: Objective, systematic, quantitative, and manifest. Objectivity relates to the specificity of the categories. Categories in content analysis should be defined so specifically that different people should be able to talk about them and get the same results. The

systematic side of content analysis refers to the selection of content to analyze. To minimize bias in a study, the selection of content must be based on a predetermined, unbiased system. Quantitative content analysis takes the views, thoughts, opinions, and insights gathered from research and expresses them into some kind of numerical way. Manifest relates to the presentation of the content. By eliminating the use of jargon and simplifying the language used to present information and conduct research, the researcher further removes bias based on prior knowledge—the reader should not have to read between the lines because all of the information is on the lines. (Levenson)

Since many research methods used in this study employ qualitative research rather than quantitative, content analysis is an extremely important part of the research process. To measure the results gathered, this study separated the research into five groups after it was completed: tablets, magazines, comparisons of tablet and print editions, customer reaction to tablet magazines, and production issues. By categorizing the research gathered into these four important topics under the umbrella of tablet magazine effects on the print industry, this study painted a clear picture of the magazine environment today. It was also able to make some predictions about the future by analyzing the information in these categories.

The Tablet Interface: Results

This study found answers to questions about the benefits and drawbacks of the tablet and traditional print interfaces in several ways. In this section of the study, the results are divided into three parts: historical research, elite and specialized interviews, and surveys. Historical research includes statistics and studies that have already been conducted by outside sources. Elite and Specialized interviews were conducted with industry professionals who have valuable insights into the magazine production process that consumers don't. Surveys show the opinions and views of consumers who may or may not be interested in magazines, and are helpful to determine what the market wants.

Historical Research

A lot can be discovered about the impact of tablets on the magazine by looking at tangible statistics and events that have already occurred relating to tablet magazines. The iPad was released on April 3, 2010 and a lot has happened since then. In addition to looking at developments in the world of the iPad, it is valuable to examine the printed magazine industry for consumer trends.

One question that is vital to tablet magazines to address is where the demand for magazines comes from. According to The Association of Magazine Media's 2010-2011 Magazine Handbook¹⁶, 10% of magazines sold are single copy, 30% of revenue is single copy. That 30% accounted for 2.73 billion dollars in 2009. Although subscriptions still

¹⁶ *Magazine Handbook*. Handbook. The Association of Magazine Media. Web. 3 Nov. 2010. <<http://www.magazine.org/handbook>>.

make up the vast majority of magazine revenue, single copy sales have the bigger gross profit margin, and obviously make up for a large amount of sales in terms of dollars. What this shows is that single copy sales—61% of which are made in supermarkets, supercenters, and drugstores—are a vital part of a magazine’s sales. That in itself doesn’t have anything to do with tablet-based versus printed magazines, but looking deeper into the statistics shows that this importance of single copy sales is a big argument in favor of the printed magazine. The fact that the majority of single copy magazine sales are made in the checkout lines of stores speaks to the fact that these people aren’t meaning to buy magazines when they end up purchasing from the checkout line. The reason that this is significant is that the fact that there are magazines *physically* there is the reason that they are sold. The iTunes store—and other app marketplaces that will offer tablet magazines—definitely has its benefits. Physical magazines, however, have the advantage of not only being able to catch a customer’s eye when the customer isn’t expecting it, but also allowing potential buyers to look through the entire magazine to see if they like or want it. This ability to reach out and grab potential customers is a huge benefit to printed magazines’ accessibility, and vital for keeping single copy sales up.

The other way to look at the previously mentioned statistic that 10% of units sold and 30% of revenue come from single-copy purchases is that a massive 90% of units sold in the magazine industry are sold through subscriptions and 70% of sales come from subscriptions. That was 6.36 billion dollars in 2009. Subscriptions are where the majority of magazine sales and magazine profits come from. The question is, “What

works better for subscriptions, tablet-based magazines or printed ones?" Until a few weeks before this study concluded, the answer was simple: No major magazines offered subscriptions for their iPad versions until about a month before this study concluded, so printed magazines had a large head start in that battle. Magazine subscriptions are still not widely offered as this study is being concluded, but it is surely only a matter of time before magazine industries start to bundle their sales into subscriptions. It has been shown already that there are people willing to pay for iPad magazines for almost five dollars per issue, and if most magazines implement the subscription model, that price should drop for subscribers.

Another vital issue for tablet magazines is the most obvious one: tablet ownership for consumers. If a consumer doesn't own a tablet, they can't access a tablet magazine. While anyone who can read can purchase and experience a printed magazine, only the select few who actually own tablets—and tablets with compatible operating systems—can buy and read tablet magazines. This enormous barrier to purchasing tablet magazines detracts from the accessibility of tablet-based magazines. According to cnet.com, tablet prices range from 400–1000 dollars¹⁷, which is a significant investment. Since the tablet market is very new, this pool only includes the iPad and the Samsung Galaxy Tab, but the selection will increase, as Hewlett Packard (HP Slate), Research in Motion (Blackberry Playbook), and Archos (Archos 10.1 Internet Tablet) are all currently developing tablets. The news isn't all bad for tablet magazines though, as a

¹⁷ "Tablets and Tablet PC Reviews - CNET Reviews." *Product Reviews - Electronics Reviews, Computer Reviews & More - CNET Reviews*. CBS Interactive. Web. 30 Nov. 2010. <<http://reviews.cnet.com/tablets/?tag=mncol;pm>>.

survey in The Association of Magazine Media's *Magazine Handbook* showed that 57% of the U.S. consumer market (who don't already own an e-reader) is interested in purchasing a tablet/e-reader within the next three years. Although that still leaves tablets far behind printed magazines in terms of accessibility, it shows a trend toward making tablets a common item for households in the United States to own. According to a press release by Apple¹⁸, three million iPads were sold within 80 days of its release, showing a definite desire to own portable tablets. It can be safely assumed, however, that the day when everyone owns a tablet and has access to tablet magazine apps won't come in the very near future.

Interviews

One important viewpoint that this study wanted to understand was the viewpoint of the advertising section of a magazine. To receive insight into this aspect of the magazine industry, this study interviewed Tyler Imoto. Imoto is the Digital Advertisement Operations Manager of the Lifestyle group at Time, Inc. His job puts him in charge of filling ad space on the digital incarnations of Time's Lifestyle group properties—including *Real Simple*, *Health*, and *myrecipes.com*. This includes Internet ads as well as ads for mobile phone and iPad apps. This gives him valuable insight into the advertising aspect of the magazine industry, which is a huge part of determining what direction magazines go, since the majority of most magazines' revenues come from advertisers. Some of the main points that Mr. Imoto brought up were the importance of

¹⁸ "Apple Sells Three Million iPads in 80 Days." Apple. Apple Inc., 22 June 2010. Web. 30 Nov. 2010. <<http://www.apple.com/pr/library/2010/06/22ipad.html>>.

subscriptions, defining the price of advertisements, the age of the technology, and the best use of iPad applications for magazine publishers.

One of the most important issues tablet magazines face from an advertising point of view is the importance of subscriptions. Imoto pushed the importance of subscriptions to advertisers. The reason that subscriptions are so much cheaper than single-copy purchases is the information that comes along with subscribing users. When a customer subscribes to a magazine, they give their name and some other information. Magazines take information from their subscribers and compare it to databases of their advertisers to see which advertisements or products customers would be most interested in, according to Imoto. For example, Time magazine can charge more for a Toyota advertisement if they can cross-reference Toyota's customer database to see if the subscriber has a record of buying Toyota cars. Odds are if five people on one street all have a subscription to a printed Time, Inc. magazine, their magazines will all look significantly different because of customized advertising. This fact of magazine advertising is crucial to the burgeoning tablet magazine industry as it is today. Right now, iPad magazines are only available on a single-copy basis, which negatively affects sales and quality in two main ways. First, the high price of single-copy editions deters prospective consumers from purchasing magazines for any sustained amount of time. With per-issue prices around five dollars, a monthly magazine subscription would cost 60 dollars per year, around 5 times as much as a subscription to the print magazine would cost. Second, the inability of magazine creators to collect information on digital

subscribers means that their advertisements can't be targeted specifically to the readers.

Defining advertisement prices is another vital issue that tablet magazines need to address now, before the industry settles on ad prices on their own. The consumers and the magazine producers can't ignore the costs of creating a digital magazine—or repurposing a printed version for a tablet edition. In our interview, Imoto offered the fact that online advertisements sell for much less than printed advertisements do. This is unsurprising when considering the size of print ads compared to online ones as well as the avoidability. When a reader flips through a magazine, they are almost guaranteed to at least see all of the ads, and full-page ads give a lot of space to catch the reader's eye. Online advertisements, however, are fairly easily skipped over and often times less interesting to readers. This is why tablet magazines need to define the pricing model well in order to sell advertisements for what they are worth. Advertisements in tablet magazines have the potential to have the best of both worlds. They can include interactivity and multimedia to grab the audience's attention, and they are almost unavoidable in the flow of the magazine. This means that advertisements in tablet magazines should be valued closely to the value of print magazines now, especially if the customer base for tablet magazines grows to rival print. It is vitally important for magazines to set the standard for tablet magazine ads high now so that advertisers realize the value of these advertisements.

Imoto also stressed that the tablet magazine is a very young product that has a lot to do before it can even be in the same league as its printed counterpart. Although iPad and magazine enthusiasts may feel that at this time magazines for the iPad are no longer extremely new, this technology is very young in the eyes of the market as a whole.

Imoto brought up the fact that they are basically testing the waters to see if the iPad/tablet magazine idea is going to work right now. Since there is only one mainstream tablet device on the market right now—the iPad—and a relatively small number of people own one at this point—as stated earlier, around three million iPads were sold worldwide as of June 22, 2010—iPad magazines can only reach a certain amount of people. Until more consumers buy tablets, tablet magazines can't possibly compete with printed ones.

Imoto also talked about some of the iPad, iPhone, and Android-based projects that TIME, Inc. currently offers or is working on. Many of the applications that they, as a company, release for mobile devices are not full editions of a magazine. Imoto mentioned several apps, including People's celebrity news tracker, TIME's mobile news app, and Real Simple's cooking app. This brings two big issues into focus, the role of mobile applications and operating systems. First, the fact that TIME, Inc. is still focused on producing apps that support their magazine, rather than compete with it may show a trend for the future. Applications may continue to be used as supplemental material to the actual printed magazines, rather than becoming the new medium to deliver those magazines. The other issue is the fact that these apps were developed for iOS and

Android only. The accessibility of mobile applications is severely hindered by the number of operating systems available for mobile devices.

Another vital opinion that this study needed was one coming from a more technical side of the digital magazine industry. That was why Peter Meirs, Vice President of Production Technologies at *Time, Inc.* was contacted to give his opinions and insights into the tablet magazine situation. Meirs' job puts him in charge of many things at *Time, Inc.*, the most prominent of which are information management systems. Meirs' department oversees information management for several different types of digital information. These include information systems that gather information on subscriber and customize magazine layouts to include targeted advertisements, systems to share data company-wide, and e-content management systems—systems that transform layouts created for print into xml that can be used for multimedia purposes. Another important part of Meirs' job puts him in a group of people that shapes the strategy for *Time, Inc.*'s digital platform products. Meirs stressed the importance of differing platforms for tablet magazines, citing the possible need for programmatic design. He also questioned whether portable tablets actually mobile and suggested that an ever-changing market will have a huge effect on the future of tablet magazines.

When the topic of this study was first introduced to Peter Meirs during his interview, he quickly asked for clarification between whether the study was examining portable tablet magazines or iPad magazines. Although the iPad is the only portable tablet with magazines available now, Meirs stressed the importance of differentiating between

iPads and tablets in this study—not using them interchangeably. The tablet is a wide-ranging term that applies to several devices now—and will apply to even more in the near future—that all have variable specifications, while the iPad is a specific device with a specific operating system and a fixed screen size. This distinction makes a huge difference to magazine publishers who are trying to release a digital magazine for a tablet. Designing for print is simple relatively simple because there are strict and established standards for output. Tablet magazine creation is more complicated because there aren't as many established rules and standards, and there are a lot more variables. For example, one snag in design for magazines on mobile devices is screen size. Meirs used the example of creating a magazine for the iPhone versus designing one for the iPad. Since there is such a vast difference in display size, the design for each version of the magazine would be drastically different. If the Samsung Galaxy Tab was thrown into the equation, that would likely spawn a third design, although there is the possibility of simply scaling one of the other ones to fit. Regardless, the variability of tablets presents a huge challenge to magazine publishers who want to reach the entire tablet audience, rather than choosing one or two to tablets or platforms to be compatible with.

This issue led Meirs to his next big point: programmatic design. Programmatic design is design that is defined by stylesheets and compiled on the computer or device on which it is being viewed. Modern websites use programmatic design to create their pages on the spot with HTML, CSS, JavaScript, and other languages. The benefit of programmatic design for tablet magazines would be that the publishers wouldn't need to create a new layout for each platform or tablet size, one layout could be programmed

in such a way that it would display correctly on whatever screen the reader was accessing it from. Although this option seems like the logical one to maximize accessibility, the decision for magazine publishers is not that simple. The look and layout of a magazine is very much a part of their identity, and publishers want to hold on to their identity. With programmatic design, a lot of the control leaves the designers' hands, and rests squarely on whatever device or browser is displaying the content. Because of this, Meirs believes with good reason that magazine publishers will continue to publish their tablet magazines with explicit design—as they do now, with designer-controlled page layouts. However, Meirs did hypothesize that the ever-evolving technology of markup languages could solve this design problem, with one of the forthcoming versions of HTML or CSS allowing designers a better mix between control and compatibility.

Meirs' next topic of discussion was from a consumer standpoint. As an iPad owner, he questioned whether the device was actually mobile. He conceded that an iPad is surely portable, as you can stick it in a bag and carry it from one place to another fairly easily, but it does not even approach the mobility offered by a printed magazine. Meirs called the size and weight of his iPad “cumbersome” and added that carrying an iPad around also required the owner to protect it, since it is an expensive and fragile piece of technology. Compare that to the mobility carrying around a printed magazine, and the printed magazine wins by leaps and bounds. Meirs described what mobile devices should be very succinctly: they should be large when you want them but small when you need them to be. In this respect, the printed magazine is a far better piece of technology

than the portable tablet, as a magazine can be doubled in size simply by opening it. All hope is not lost for portable digital magazines, as flexible display technology is being developed, but that technology is a long way out, especially for consumer use.

When asked whether tablet magazines will impact the printed magazine, Meirs gave a resounding yes. However, he added that it is yet to be determined how big that impact will be. He cited references of other digital technologies taking over from their analog predecessors, such as CDs from records, then MP3s from CDs, as well as DVDs from VHS, to illustrate this. Meirs stated that for digital alternatives to fully replace their analog counterpart, the digital option must be unquestionably better. This is a simple concept, but when applied to the comparison of tablet versus print as a medium for magazines, it is hard to define one as unanimously better than the other. This fact points towards print retaining dominance or at the very least co-ownership of the magazine.

The final point that Meirs spoke about was the possibility that the concept of the magazine may become outdated and disappear. That is to say, the idea of having a “magazine” that consists of a cover, a table of contents, and content all displayed on separate pages may not appeal to the next generation. They may feel that that form of entertainment is inconvenient, when they could just as easily get similar information from a website-style interface.

Surveys

For this study, two types of survey were conducted: One survey was administered online while the other one was given in person after comparing printed and tablet editions.

The online survey was meant to determine the subjects' magazine reading habits and attitude towards portable tablets and magazines on those tablets. The in-person survey determined the strengths and weaknesses of tablet magazine itself versus its printed counterpart. These surveys were meant to get a better grasp on how consumers feel about magazines and tablets.

The online survey determined the customer base's predisposition, or attitude, towards tablets and printed magazines without any education on the topic. Most of the contacts available to this study were college students or recent college graduates. Of the 204 people who took this survey, 122 of them listed their occupation as student and 173 of them were under 25 years of age. Although in the short term this demographic is not one that is particularly likely to own a tablet or subscribe to a lot of magazines, it does represent the future market for magazines and tablets. This survey is also significant because it is simply what people think of the idea of tablet magazines without having the idea sold to them.

The online survey showed, as expected, that only a very small percentage of the people who took the survey actually owned a tablet. To be exact, only 5 out of 204 owned tablets, and all of those were iPads. Slightly more surprising was the number of people who had never even used an iPad or other portable tablet. Just over 50 percent of those

surveyed said that they had never used an iPad or other tablet. Of the 101 respondents who had used a tablet, four people claimed to have used tablets in addition to the iPad. This lack of exposure shows just how far tablets need to go before they become mainstream. If around 50 percent of young people haven't even touched an iPad, the percentage of the older, less tech-savvy generation is likely to be even lower. The survey also revealed that almost 88 percent of those surveyed would only pay for an iPad-like tablet if it cost less than 400 dollars—about 38 percent would buy a tablet for less than 200 dollars and around 50 percent valued tablets somewhere between 201 and 400 dollars. This discrepancy between customer valuation of the product and actual price—which, as discussed, was between 500 and 1,000 dollars at the time of this study—represents yet another hurdle for tablet editions to overcome before those versions of magazines will be accessible to a significant audience. However, almost 62 percent of those surveyed saw themselves owning a tablet in less than four years, with around 24 percent of respondents replying that they will never buy a tablet.

Another important thing to consider is the predisposition of the survey pool towards buying or not buying magazines. Of the 204 respondents, 113—or about 55 percent—of them didn't subscribe to any magazines. Almost 38 percent of the respondents subscribed to one or two magazines, while the other seven percent subscribed to three or more magazines. This makes sense for students, since many college students live in dormitories or don't live at permanent addresses. However, when asked how many times they read magazines, only 15 percent answered that they never read magazines. Around 70 percent said they picked up a magazine between one

and three times per month, that portion divided almost evenly between those who answered once a month and two to three times a month. This shows that although the majority of those surveyed don't subscribe to magazines, they are still interested in reading magazines once in a while. The respondents surveyed for this part of the study were not magazine enthusiasts, but they were magazine readers.

The last part of the survey addressed the respondents' opinions of magazines for tablets. When asked whether or not they would buy magazines for their tablet if they owned one right now, only around 39 percent said yes. Of the people who said they would buy magazines for a tablet if they had one, 60 percent of them said that they would pay less than two dollars for a tablet magazine and just over a quarter of them would pay between two and three dollars. When asked which edition of a magazine subscription they would prefer—tablet, print, both, or neither—print got the most votes. The spread favored printed magazines for this question, with “print” pulling in 40 percent of the respondents, “tablet” being chosen by 30 percent, “both” receiving 19 percent of the survey takers, and 11 percent choosing neither. The responses to this study's online survey from the unbiased community show that, with the current knowledge of the market, customers are not ready to embrace tablet magazines.

The second survey conducted by this study was meant to show how consumers reacted to tablet magazines after having the opportunity to actually get their hands on one. This was more of a product test than a survey, and the testers were asked to fill out a short response worksheet when they had seen the print and tablet versions of one or

both magazines. The results of this survey yielded more specifics about the upsides and downsides of tablet magazines and print magazines as products. In addition to showing the strengths and weaknesses of tablet versus print magazines, this survey showed how two leading tablet magazines stacked up against each other. Since the medium is such a new one, magazine publishers are all toying around with their own layout and navigation options. This survey let testers compare the navigation and layout systems presented by *WIRED* and *TIME*, two of the leaders in the tablet magazine industry. The responses to the questions asked by this survey varied widely, with none of the print versus tablet comparisons having a universal winner. The various responses to the “why” aspect of each question, however, presented valuable information on reasons that one or the other was superior in each category.

The first category in which the testers were asked to explain their preference was navigation. This was a great test for the tablet magazines because designers of tablet editions are still trying to find a balance between mimicking the print edition and creating a completely new interface. Several of the testers’ responses indicated that the magazines in question did not quite get that balance right. Seven of the thirteen readers who tested *WIRED* deemed print easier to navigate, while only two of the nine testers thought *TIME*’s print version was the better of the navigation interfaces. Most of the testers who claimed the print magazines were easier to navigate cited familiarity and page numbering as reasons. In *WIRED* especially, testers had trouble navigating through the magazine without page numbers. Another issue that some testers had with the iPad version of magazines that pushed them toward the print edition was load time and

responsiveness. In *TIME* especially, pages loaded slowly, while page turning controls were sometimes touchy and either turned the page when the tester didn't mean to or jumped to other parts of the magazine because the reader touched a link accidentally. Another difficulty for testers was determining which pages scrolled vertically, as large chunks of content could be skipped when that aspect wasn't made obvious. However, several of the testers who cited the print version as the easier one to navigate pointed out that they were still at the beginning of the learning curve for the iPad version, and they acknowledged that it would most likely get easier with time.

There was also a group that enjoyed the tablet interface better for navigating the magazines. Navigation for the tablet versions of the two magazines in question were received very differently, although they both had similar features. One of the things that testers liked most about using the tablet magazines was the ability to jump to other stories quickly. In both versions of the tablet magazines there were multiple ways to jump quickly to specific stories, and these jumps of many pages were far easier for the tablet versions than they were in print. The thing that held this ability back was its level of intuitiveness. Each magazine had several different ways to navigate through the content. Both magazines had a slider on the bottom that cycled through all of the pages of the magazine, and they both also had a drop-down list that expanded from the toolbar on the top that listed all of the articles and allowed the reader to jump straight to any story in the magazine. *WIRED* had a feature that allowed the reader to scroll through thumbnails of all the pages in the magazine, which had the added benefit of making it clearer which pages scrolled vertically as well as horizontally. These were all

wonderfully useful features and the people who discovered them found the magazines much easier to navigate, but once again, the problem was that most readers didn't know about all the ins and outs of using a tablet magazine. The testers who discovered all of the navigation features supported by both iPad magazines seemed fairly satisfied with the navigation, but the biggest issue facing tablet magazine designers may be creating a good way to teach readers about all the features at their disposal.

Another issue addressed by this tester survey was the interest sparked by advertisements in each form of the magazines. Although magazine readers usually don't pick up magazines for the advertisements, ads are the largest source of revenue for magazine publishers and advertisement engagement from readers is extremely important to magazines from a business standpoint. The responses for this section of the survey were almost universally in favor of tablet advertisements. Although some chose tablet advertisements solely because there were less of them or they could be more easily skipped, just as many liked advertisements better in tablet magazines because of the expanded features. Many testers stated that the tablet magazine ads were much more vibrant in color than their print counterparts, which did a better job of catching their eye. The backlit screen made the advertisements look a lot better on the iPad than they did in print, with more vibrant colors available to use in page designs. Another feature that some of the testers commented on as being a strong point of the advertisements in the tablet magazines was the interactivity. Print magazine advertisements are, for the most part, static, limiting reader interaction with the advertisements. Tablet magazine advertisements, however, have much greater

possibilities. Some advertisements in the two tablet magazines examined in this study included videos, which tend to be more exciting and entertaining than static images, and several testers liked the inclusion of videos. The inclusion of interactivity of the tablet “made the ads more interesting” leading one reader to “[check] them out whereas in a print magazine [he] would just fly past them.” This shows that advertisements in tablet magazines have much more attention-grabbing power than they do in magazines.

The next question in the survey asked testers to determine on which medium the actual editorial content was more enjoyable. Like the advertisements, some of the articles were very similar to their print counterparts while others differed greatly. The responses to preference on the article presentation were similar in distribution to navigation. Six of the twelve testers who commented on having a preference for the articles for *WIRED* liked the tablet version better, while six out of nine that commented on *TIME*'s articles liked them for the tablet better. Navigation was a big factor in many responses, with testers citing the ability to scroll down to read entire feature articles vertically as being a definite benefit. This navigation option was especially different from *WIRED*'s print edition, in which most of the feature articles required the reader to jump to the end of the magazine partway through the article. Testers claimed that another valuable aspect of the tablet versions of articles that was their ability to contain multimedia elements. Several of the responses from testers cited videos as a strong benefit of tablet magazines. Tablet magazines were able to offer the same stories as the print editions had, but supplement them with videos and/or animations, which was a huge benefit.

Most of the testers did get a “Wow” factor from the features that were included in some articles, which wasn’t always mirrored by the print edition.

There were still several testers who enjoyed the print editions’ articles better than the tablet editions’. One argument for the articles in the print versions of the articles was the use of the two-page spread. Several testers enjoyed the possibilities presented by a large, two-page space to create an eye-catching article. One tester also mentioned that the larger size given by spreads gave a sense of importance to the feature stories, while all the stories in the tablet had the same initial size to work with. This shows that although the tablet editions of magazines do have several new possibilities, print still has certain physical capabilities that can’t be matched. Another thing that multiple testers cited as a reason for rating the print articles as better than their tablet counterparts was the backlit screen. Some testers didn’t enjoy reading longer articles from a backlit screen, as the paper version was much easier on the eyes. This is the same reason that most e-readers like the Kindle and the Nook use e-paper instead of a backlit screen.

When it came down to the most important question, the results went in favor of the tablet magazines. Nine of the thirteen testers liked the tablet version of *WIRED* better, three liked the print version better, and one had no preference between the two. The testers who evaluated *TIME* yielded similar results, with seven preferring the tablet version and two liking the print magazine better. The most common thing that testers who enjoyed the tablet version better said was that they liked the tablet version because it was “cool”

or “fun.” Some testers acknowledged that the tablet version might have just been more enjoyable because the technology is new and the magazines do things that most readers never would have thought that a magazine could do. Testers also mentioned vivid colors and overall aesthetic appeal as something that were strengths of both tablet magazines.

The Tablet Interface: Conclusions

This study set out to determine the future of magazine publishing after the introduction of a new option—the tablet. What it discovered is that there are many variables in the process of shifting magazines from print to digital, and printed magazines have a very firm hold on the magazine industry. This conclusion was drawn by investigating several aspects of portable tablets, magazines, current editions—print and tablet—of magazines, market response to magazines for tablets, and production issues.

The portable tablet is in its infancy as a product. The first consumer-grade portable tablet—the iPad—was released only seven months before this study was concluded, and this study as well as various others have shown that consumers have a high level of interest in them. Three million iPads sold within 80 days of its release, 57% of the U.S. consumer market who don't already own an e-reader or tablet are interested in purchasing one in the next three years, and this study's survey of primarily consumers under 25 years of age yielded that 62% of them see themselves buying a portable tablet in the next four years. This shows that there is a great amount of interest in portable tablets, especially from the younger generation. However, there is a great discrepancy in the price the most of the people surveyed would pay for a tablet. Eighty-eight percent of those surveyed for this study reported that they would only buy a portable tablet if it was priced at 400 dollars or less. Since the only tablets that ran digital magazines at the time of this study were priced between 500 and 1,000 dollars, that discrepancy, combined with the short amount of time since release, reflects the relatively small

amount of tablets in the market. However, as technology advances and more tablets enter the market, lower-price options will emerge, giving more consumers the possibility of owning a portable tablet. Market trends suggest that the demand for portable tablets will continue to rise, leading to a much greater potential audience for tablet editions of magazines.

The study also showed that the magazine industry is in relatively good shape for the time being. Although sales are slowly declining, magazines have been far more stable than industries such as newspapers and book printing. The magazine industry pulled in over nine billion dollars from magazine sales alone in 2009, proof that there was still money to be made in the magazine industry. Ninety percent of the magazines distributed were sold from subscriptions, while the other 10 percent were sold at newsstands. The domination in terms of units sold by subscription is something that suits customers and publishers alike. Consumers valued magazines lower than their newsstand price in both surveys conducted by this study, and subscription prices are almost always less per issue than newsstand prices. Tyler Imoto revealed that publishers like subscribers because of the information that comes along with their subscriptions. This information allows publishers to include specific advertisements that target customers based on cross-referencing databases from advertisers. This shows that subscriptions are still the main distribution method for magazines, and are preferred by customers and publishers alike. Results from this study's survey were less positive for the magazine industry. The survey returned that 55 percent of the 204 respondents didn't subscribe to any magazines. However, only 15 percent of the respondents replied

that they never read magazines. What this shows is that although many of the younger generation don't subscribe to magazines, they at least have an interest in them, meaning that the form of media is not dead, as Meirs worried the trend may be leaning towards. This study has shown that the printed magazine industry is still very much alive, and has a very solid and established hold on its position.

The next topic that this study covered was comparing the functionality of portable tablet magazines compared to print magazines. In this category that the newer, more advanced technology might seem like it would have the upper hand, print still held its own. This is due to the fact that printed magazines still present information different—and in some opinions better—than any other medium in which it is available. The survey of testers who were able to test two magazines in both their print and tablet forms yielded many responses in favor of the print magazines, and as Peter Meirs stated in his interview, digital technology must be unquestionably better to overthrow its analog predecessor. The print edition of the magazines edged out the tablet version in the navigation battle for *WIRED* magazine, with seven of the 13 testers preferring the navigation in the print version, but a resounding seven out of nine testers of *TIME* magazine preferred the digital interface. There was a definite learning curve for using the tablet version of each magazine, something that print doesn't have to deal with. Almost all of the testers enjoyed the advertisements in the digital versions better, citing interactivity, animation, vivid colors, and unobtrusiveness as reasons. This is an important aspect of the digital magazine because, as discussed in Tyler Imoto's interview, defining a profitable advertisement pricing model is vitally

important to the success of tablet editions of magazines, as the majority of magazine publishers come from advertisements. Testers' opinions on which medium was better for the editorial content itself was split fairly evenly, with explanations crediting animation and interactivity as a positive for the tablet editions and the two-page spread a benefit of the printed magazine. This means that neither platform was definitively better for reading the actual content of the magazine. Testers did rate the magazine experience of the tablet magazines better overall, but with the disclaimer that the tablet editions had a "wow factor" because the testers had never seen anything like them before. It will be interesting to see whether that wears off when or if tablet magazines become more commonplace, or if the new features continue to make the tablet version more appealing.

This studies results for the functionality of tablet editions versus print editions went slightly in favor, but not decisively enough to cause magazine publishers to shift an inordinate amount of attention away from print in favor of tablet editions.

The next factor considered by this study was consumer response to magazines for portable tablets. This factor considered data collected by the online survey and insights from Peter Meirs, who owned an iPad and had some opinions about its viability for magazines on the consumer-side. The survey didn't yield very positive results for tablet magazines, with 61 percent of respondents claiming that they wouldn't buy tablet magazines if they owned a portable tablet. Of those that said they would buy them, 60 percent would only do so if the magazine cost less than two dollars. This shows that it is not simply an issue of getting consumers to buy tablets that will boost tablet editions of

magazines to be sold; the magazine publishers themselves need to market tablet editions better. It also shows that the market in general is not ready to pay the price for tablet magazines, so publishers must find a way to lower that cost if they are to attract a broader audience of readers. Another interesting input into the consumer response to tablet magazines came from Peter Meirs, who discussed his own issues with his iPad. Meirs found his iPad cumbersome and difficult to use outside of the home or office. This is one aspect in which printed magazines have a vast advantage, and will continue to have it unless new technology such as the flexible display is implemented in portable tablet technology. This section of the study showed that, in general, the market is not ready to actually invest in tablet magazines.

The last aspect of the tablet versus print debate analyzed in this study was the production side of magazines for the two mediums. Peter Meirs and Tyler Imoto both had valuable insights to the production side of creating digital magazines for tablets. Meirs stressed the importance of variable operating systems and tablet sizes impacting the design process for digital magazines. This inconsistency is yet another barrier to tablet magazines reaching customers, which means that more advancements in technology are required to allow tablet magazines to compete with their print counterparts. Tyler Imoto cited the platforms that *Time, Inc.* was developing applications for as proof of this challenge for mobile applications. He could only find applications that *Time, Inc.* was developing for iPhone, Blackberry, and Palm. However, the application for Palm was funded and created by Palm themselves to boost the attractions that their store offered. Programmatic design is a possibility for magazine

publishers, but programmatic design that meets the standards required by magazine designers is not developed yet, and would take time to be put into effect. Print magazine design is much simpler by comparison. There are standards in place that make exporting PDFs for print relatively simple. The evidence given by Tyler Imoto and Peter Meirs points to significant advancement in digital magazine technology being necessary before tablet magazines will be available to the masses.

These five categories led this study to predict that tablet magazines, as they exist today, will take some portion of the magazine market, but leave the majority for print. The technology of the portable tablet is certainly something that a large portion of the market wants, as was shown by this study's investigation of the portable tablet itself. However, the strength of the magazine as it is now, the ambiguity of the tester preferences, the market's ambivalence towards tablets as a medium for magazines, and issues with tablet magazine production will slow down the spread of tablet magazines tremendously. New technology such as flexible displays or more sophisticated programmatic design could propel tablet-editions of magazines in popularity, but as neither of those things are on the horizon for the near future, the bulk of magazine sales seem bound to be made in print.

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Appendix A

Estimated Net Sales

	2022		2023		2024		2025		2026		2027		2028		2029		Compound Growth Rate 2002-2009	
	Census	\$	% Change	\$	% Change	\$	% Change	\$	% Change	\$		% Change						
Trade (Total)	7,144,188	6,872,190	-3.8%	7,504,458	9.2%	8,043,471	7.2%	8,274,103	2.9%	8,525,932	3.0%	8,079,423	-5.2%	8,067,504	-0.1%	8,067,504	-0.1%	1.8%
Adult Hardbound	2,371,553	2,314,636	-2.4%	2,450,458	6.3%	2,495,175	1.4%	2,597,477	4.1%	2,800,080	7.9%	2,436,070	-13.0%	2,604,159	6.9%	2,604,159	6.9%	1.3%
Adult Paperbound	1,876,620	1,865,360	-0.6%	1,917,590	2.8%	2,093,187	9.5%	2,277,618	8.5%	2,282,173	0.2%	2,384,331	3.6%	2,241,386	-5.2%	2,241,386	-5.2%	2.6%
Juvenile Hardbound	1,636,248	1,484,077	-9.3%	1,902,587	28.2%	2,100,456	10.4%	2,068,447	-2.0%	2,048,155	-0.9%	1,794,184	-12.4%	1,704,475	-5.0%	1,704,475	-5.0%	0.6%
Juvenile Paperbound	1,259,767	1,238,117	-1.7%	1,223,823	-1.3%	1,348,653	10.2%	1,340,561	-0.6%	1,385,524	4.1%	1,494,838	8.4%	1,517,504	2.2%	1,517,504	2.2%	2.7%
Book Clubs & Mail Order	852,394	775,669	-9.0%	706,634	-8.9%	659,290	-6.7%	639,511	-3.0%	621,605	-2.8%	600,470	-3.4%	588,461	-2.0%	588,461	-2.0%	-5.2%
Mass Market Paperback	1,216,710	1,196,026	-1.7%	1,089,580	-8.9%	1,081,759	0.2%	1,141,980	4.6%	1,119,140	-2.0%	1,085,566	-3.0%	1,042,143	-4.0%	1,042,143	-4.0%	-2.2%
Audiobooks	143,410	161,049	12.3%	159,922	-0.7%	206,289	29.0%	182,162	-11.7%	218,230	19.8%	220,412	1.0%	191,979	-12.9%	191,979	-12.9%	4.3%
Religious	556,799	836,312	50.2%	883,145	5.6%	829,273	-6.1%	744,697	-10.2%	783,411	5.2%	723,872	-7.6%	668,724	-9.0%	668,724	-9.0%	2.4%
E-books	7,337	19,772	169.5%	30,271	53.1%	43,832	44.8%	54,386	24.1%	67,233	23.6%	113,220	68.4%	313,167	176.6%	313,167	176.6%	71.0%
Professional	3,155,191	3,268,778	3.6%	3,334,154	2.0%	3,300,812	-1.0%	3,376,731	2.3%	3,474,696	2.9%	3,474,696	0.0%	3,357,022	-3.4%	3,357,022	-3.4%	0.9%
E-LH (K-12 Education)	5,795,044	5,939,920	2.5%	5,945,860	0.1%	6,570,175	10.5%	6,189,105	-5.8%	6,356,211	2.7%	6,076,538	-4.5%	5,237,976	-13.8%	5,237,976	-13.8%	-1.4%
Higher Education	3,025,029	3,133,930	3.6%	3,190,341	1.8%	3,359,429	5.3%	3,453,493	2.8%	3,677,970	6.5%	3,777,275	2.7%	4,264,543	12.9%	4,264,543	12.9%	5.0%
All Other	136,488	153,932	12.8%	161,629	5.0%	158,568	-1.9%	140,841	-11.3%	115,185	-18.1%	188,976	46.7%	134,167	-20.6%	134,167	-20.6%	-0.2%
Total	22,032,580	22,367,578	1.5%	23,005,994	2.9%	24,262,898	5.5%	24,196,809	-0.3%	24,969,573	3.2%	24,303,035	-2.6%	23,865,706	-1.8%	23,865,706	-1.8%	1.1%

Thousands of Dollars



Source: http://www.publishers.org/main/IndustryStats/indStats_02.htm (Association of American Publishers)

Appendix B

Magazine Publishers of America - The Definitive Resource for the...

http://www.magazine.org/CONSUMER_MARKETING/CIRC_T...

ANNUAL COMBINED PAID AND VERIFIED AVERAGE CIRCULATION PER ISSUE OF ALL ABC MAGAZINES, 1970 - 2009			
Year	Subscription	Single Copy	Total
1970	174,504,070	70,231,003	244,735,073
1975	166,048,037	83,935,424	249,983,461
1980	169,846,505	90,895,454	280,741,959
1985	242,810,339	81,076,776	323,887,115
1990	292,444,099	73,667,773	366,111,872
1991	292,852,615	71,894,865	364,747,479
1992	291,613,749	70,694,310	362,308,059
1993	294,905,373	69,418,673	364,324,046
1994	295,648,763	67,917,148	363,565,911
1995	299,050,282	65,846,048	364,896,329
1996	299,532,710	65,984,883	365,517,593
1997	301,244,640	66,133,817	367,378,457
1998	303,348,603	63,724,643	367,073,246
1999	310,074,081	62,041,749	372,115,830
2000	318,678,718	60,240,260	378,918,978
2001	305,259,583	56,096,430	361,356,013
2002	305,438,345	52,932,601	358,370,946
2003	301,800,237	50,800,854	352,601,091
2004	311,818,667	51,317,183	363,135,850
2005	313,992,423	48,289,137	362,281,559
2006	321,844,445	47,975,657	369,820,102
2007	322,359,612	47,433,976	369,793,587
2008	324,818,012	43,664,772	368,482,784
2009	310,433,396	36,138,517	346,571,912

Sources: Averages calculated by the MPA from Audit Bureau of Circulations statements for the first and second six months of each year. Domestic titles audited by ABC; annuals, international editions and comics have been excluded. Totals may not add up exactly, due to rounding of averaged numbers.

Source:

http://www.magazine.org/CONSUMER_MARKETING/CIRC_TRENDS/1318.aspx