

Where do tablets fit in your news organization's future?

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This report focuses on what has been learned so far about news consumption behaviors on Apple iPads from research conducted by the Reynolds Journalism Institute (RJI), The Associated Press, Online Publishers Association and Google's AdMob subsidiary between July 2010 and June 2011. While competing devices are now making their way into the consumer marketplace, their numbers were insignificant compared to the iPad when this research was conducted.

With the iPad, Apple defined an entirely new category of electronic media. The iPad and comparable devices, now often referred to as "media tablets," make consuming and engaging with all types of media simple, convenient and enjoyable within a visually rich mobile environment. Media tablets have more in common with nearly instant on/off consumer appliances, smartphones, and e-readers than with technically challenging personal computers, netbooks, and pen-based tablet PCs. Media tablets also appear to have more in common with print media, which is why they have generated so much interest from newspaper and magazine publishers in the 14 months since the iPad's debut in April 2010.

Several news organizations, including *The New York Times*, *USA Today*, *The Wall Street Journal*, and The Associated Press, have made their content available to download and read within iPad apps from the first day that iPads went on sale. In the ensuing months hundreds of news organizations from around the world have launched their own iPad news apps. In the same period, hundreds of technology enterprises and entrepreneurs have developed their own

news apps for the iPad. Most of these apps aggregate content from multiple sources, such as websites, blogs, and twitter feeds, based on personal preferences.

Today, more than 25 million iPads and an estimated five million competing media tablets are in use globally. The Online Publishers Association (OPA) estimates that 23% of the U.S. Internet population, ages 8-64, will own or use a media tablet by early 2012. That represents an estimated 54 million U.S. consumers.

Most analysts are now forecasting that as many as 120 million iPads and 40 million other media tablets will be in use globally by the end of 2012. They also expect that by then more than 5,000 news apps along with several hundred thousand other apps will be available to use on media tablets.

Android tablet sales have been disappointing and so far have not generated the level of excitement generated by the iPad. Nearly all of the technology analysts are now predicting that Apple will continue to dominate the media tablet market for at least the next three years. According to a report recently released by comScore, the iPad now represents 97% of all Internet tablet traffic in the U.S. and 89% worldwide. More details can be found at <http://www.prnewswire.com/news-releases/comscore-introduces-device-essentials-for-measuring-digital-traffic-from-all-devices-enabling-optimization-of-marketing-strategies-and-customer-experience-124418053.html>.

PROJECTIONS FOR THE END OF 2012

Based on what we've learned from the RJI surveys and research conducted by other organizations, here's what I believe we can expect by the end of 2012.

If the iPad and other media tablets follow the usual pattern for new media technologies, we can expect women to count for nearly half of the users in the next couple years. Media tablets are ideally suited to displaying visually rich, interactive catalogs and transactional advertising within apps. So, I have no doubt that shopping and purchasing within apps will become increasingly popular, especially with women. We also can expect media tablets to attract younger and older users as prices fall and earlier generations of tablets get handed down and sold online.

Newspapers that take full advantage of the tablets' ability to provide a relaxed reading experience as well as facilitate shopping and purchasing are likely to see significant revenue gains. By the end of 2012, revenue from tablet editions and niche products could equal more

than half of the total revenue from all other digital media at some newspapers. With an installed user base of at least 160 million iPads and comparable tablets by the end of 2012, several national and international newspapers might be able to attract more than a half-million subscribers. (That's less than one-third of one percent of all forecast iPad/tablet users for the end of 2012.) By then, some regional and metro newspapers should have more than 50,000 subscribers for their media tablet editions.

Production of iPad/tablet editions is certain to become easier and cheaper as new tools become available. The biggest challenge for newspapers will be adapting their legacy publishing systems to meet the requirements for iPad/tablet editions.

Based on interviews with publishers recently conducted by Houston Harte Chair and Professor Mike Jenner at the Missouri School of Journalism, at least half of the newspapers that do not offer a tablet app today are likely to offer one by the end of 2012. Jenner also found that a majority of publishers are planning to charge for subscriptions to their editions within apps. (More details about Jenner's research can be found on the RJJ website at <http://rjionline.org/news/small-papers-lead-way-charging-online-content>.)

RECOMMENDATIONS

If your newspaper is considering development of an iPad/tablet app, the first step should be to sample your market to get some idea of local penetration and usage. For at least the next year or two, iPads and other media tablets will be concentrated in major metro markets where Wi-Fi hot spots and 3G are readily available.

Newspaper publishers need to get media tablets in the hands of their editorial, advertising, circulation and marketing staffs as soon as possible. Media tablets are highly personal devices, so sharing a couple devices in the office won't help much. Providing incentives for employees to purchase and use media tablets at home as well as at work could prove to be a good investment for publishers. Reporters and photographers could use them for research and to file stories and images from remote locations. The ad sales staff also could use media tablets on sales calls to preview ad campaigns and even place orders remotely.

Newspaper publishers also should consider producing topical, magazine-like niche products within free apps that target readers and advertisers in their markets in addition to creating compelling transactional ads for editions within their news apps. If publishers don't do

this soon, non-news entrepreneurs will capture this opportunity. A few such entrepreneurs are already developing shopping apps with editorial content that they produce.

Newspapers and news organizations need to monitor the development of new mobile websites based on HTML5 and other emerging online technologies. With HTML5, products that closely mimic tablet apps can be displayed on multiple platforms.

The best way to learn is to study what other organizations are doing with their tablet apps and mobile Web applications. There is no shame in stealing the best ideas. Everyone in your organization should be encouraged to share his or her experiences and ideas. That's a central tenet of RJI's Digital Publishing Alliance (DPA). You also need to actively seek and apply suggestions and feedback from your non-readers as well as your loyal readers.

The best apps tend to start relatively simple and then continuously evolve. The app stores make it easy to distribute updated versions that add features and fix problems. Fixing problems quickly is critical to the success of all apps.

Do not be afraid to charge for subscriptions to your iPad and media tablet editions. A significant percentage of users have indicated that they are willing to pay for the convenience and enjoyment of reading a relevant package of curated news and features within an app if the price is reasonable. Users also appear willing to spend more time with tablet news apps than they do with websites. That should be good news for long-form journalism as well as advertising. While videos can play an important role for telling some stories, I am confident that well-written, validated stories will continue to be the mainstay of newspapers, regardless of the display medium and format.

While it is too soon to know with any certainty if iPads and comparable media tablets will provide established publishers with profitable digital alternatives to traditional print, there can no longer be any doubt that media tablets and other mobile electronic devices are destined to become the dominant media for consuming and engaging with news in the 21st century. How quickly and effectively established news organizations adapt to the challenges presented by mobile media devices and the changing patterns of news consumption may well determine their future.

The following research results compiled for this RJI report came primarily from five surveys.

The Summer 2010 Associated Press News Apps Study (conducted for the AP by InsightExpress): Responses from 2,074 iPad users were gathered between July 13 and August 16,

2010, from promos linked to the survey within three iPad apps — AP News, BBC and NPR. (A recording of the AP session about the study presented at the Fall 2010 RJI-DPA tablet symposium can be found on the RJI website at <http://www.rjionline.org/events/fall-2010-tablete-reader-symposium-and-dpa-meeting-recorded-sessions>.)

The Fall 2010 National RJI iPad News Survey (conducted online using SurveyGizmo): Responses from 1,598 iPad users were gathered between September 6 and November 30, 2010, from stories with links to the survey on several media and technology websites and blogs in addition to the RJI website. A promo with a link to the survey also appeared on the AP News iPad app in October and November. (Details can be found on the RJI website at <http://rjionline.org/news/dpa-ipad-research-project>.)

The March 2011 National RJI iPad Panel Survey (conducted online using SurveyGizmo): The 561 respondents who completed this follow-up panel survey between March 16 and 31, 2011, were self-selected from the nearly 1,600 Apple iPad users who participated in the Fall 2010 RJI iPad News Survey. Panelists were offered a \$10 iTunes Gift Card as an incentive to complete the follow-up survey. (Details can be found on the RJI website at <http://rjionline.org/news/rji-dpa-spring-2011-ipad-survey-results>.)

The March 2011 Google Tablet Survey (conducted by AdMob, a subsidiary of Google): Responses from 1,430 media tablet users were gathered in March 2011. Details on how the participants were recruited and the number who were iPad users were not made public at the time this report was compiled, although it can be assumed based on media tablet sales numbers through March 2011, that the majority of respondents owned or use an Apple iPad. (Details can be found online at <http://services.google.com/fh/files/blogs/AdMob%20-%20Tablet%20Survey.pdf>.)

The April 2011 Online Publishers Association’s “A Portrait of Today’s Tablet User” survey (conducted for OPA in partnership with Frank N. Magid Associates, Inc.) This nationally representative online survey of 2,482 people included 2,051 respondents between the ages of 18 and 64, and 431 respondents between the ages of 8 and 17. The data were collected from April 15 through April 20, 2011. The results were made public in June 2010. (Details can be found online at [http://onlinepubs.ehclients.com/images/pdf/MMF-OPA_-_Portait_of_Todays_Tablet_User_-_Jun11_\(Final-Public\)3.pdf](http://onlinepubs.ehclients.com/images/pdf/MMF-OPA_-_Portait_of_Todays_Tablet_User_-_Jun11_(Final-Public)3.pdf)).

I have compiled the results of these surveys within the eight following categories.

- **Who uses Apple iPads?**

Summary: The early adopters of Apple iPads are predominantly well-educated, affluent men relatively evenly distributed between the ages of 35 and 64. (The Google survey provided no demographic information.)

- **How much time are people spending with iPads?**

Summary: Most people are likely to spend more than an hour a day using their iPad. A majority of respondents were likely to spend more time consuming news on the iPad than with other media. The early adopters are highly satisfied with the iPad and their satisfaction is likely to increase over time.

- **Where and when do people spend the most time with iPads?**

Summary: People spend most of their time with the iPad at home in the evening hours. They also are likely to use their iPad consistently throughout the week with somewhat more usage during weekdays.

- **What are the main uses for iPads?**

Summary: Personal media consumption clearly dominates usage of iPads. People are much more likely to use media tablets for personal, non-productivity related activities than for work related activities. They also are more likely to read longer text stories. Consuming news ranked as one of the top uses for the iPad.

- **What are the most popular iPad news apps?**

Summary: Even though news apps represent a small percentage of all available tablet apps, they are among the most popular downloads on the iPad. Apps for national newspapers and news organizations tend to be the most regularly used for news. iPad users also have indicated a strong preference for reading news within apps.

- **How are media tablets likely to influence subscriptions to printed newspapers?**

Summary: iPad users who consume news regularly do so across multiple media. However, a correlation analysis based on responses to the 2010 RJJ survey shows that the more a person uses the iPad for news consumption, the less he or she uses printed newspapers. Low prices and ease of use are likely to be key factors in users' decisions to purchase newspaper subscriptions on the iPad.

- **What other electronic media do iPad users own?**

Summary: Users of Apple iPads tend to own and use an array of other electronic media with a strong preference for Apple products.

- **How does the iPad reading experience compare with other media?**

Summary: A majority of respondents considered their reading experience with the iPad to be better than or at least the same as their reading experience with other forms of media.

WHO USES APPLE IPADS?

Gender: About 85% of the AP respondents and 80% of the RJI respondents were male in the 2010 surveys. In the March 2011 RJI survey, males represented 76% of the panelists. If the iPad and comparable media tablets follow the usual pattern for new technologies, the percentage of female users can be expected to increase significantly in the next few years. The April 2011 ONA survey found that 45% of the respondents who said they plan on purchasing a media tablet in the next 12 months were female.

Income: More than half of the RJI survey respondents (52%) reported an annual household income of at least \$100,000. In the same survey, more than one-third (34%) reported an annual household income between \$50,000 and \$99,999. Of the ONA respondents who owned or used media tablets, only 13% reported an annual household income of \$100,000 or more; 30% reported an income of \$50,000-\$100,000. The AP and Google surveys did not inquire about household income; however, the AP survey found that nearly three-quarters (74%) of the respondents had personally purchased their iPads, which suggests a higher than average annual household income.

Education: More than three quarters (76%) of the 2010 RJI survey respondents were college graduates with at least a bachelor's degree. Half of the college graduates indicated that they had attained a graduate or professional degree. None of the other surveys inquired about education.

Age: About 70% of the AP and RJI respondents were relatively evenly distributed between the ages of 35 and 64. In the AP survey, about 5% of the respondents were age 24 or younger, and 8% were age 65 or older. In the RJI survey, only 3% were age 24 or younger, and 11% were age 65 and older. The average age of the AP's respondents was slightly younger than the RJI's respondents in 2010 (45 vs. 48). However, in the March 2011 RJI survey, the average

age of the panelists was closer to 45. In the April 2011 OPA survey, the early adopters of media tablets skewed significantly younger (48% were 18-34 years old).

As the prices of iPads and comparable media tablets decline and more of the earlier devices are “handed down” to other family members, the numbers are likely to grow for younger and older age groups.

Early adoption: The 2010 RJI survey found that nearly half (45%) of the respondents acquired their first iPads in April or May 2010 (Apple began delivery of the iPad on April 5). Of the 83 panelists who said they had an iPad 2 in the March 2011 RJI survey (Apple began selling the iPad 2 on March 11), more than half (46) indicated in the 2010 RJI survey that they had purchased their iPad 1 during the first two months of its release. The April 2011 OPA survey found that 21% of the respondents who owned or used a media tablet had an iPad 2 (46% had an original iPad).

Employment: The March 2011 RJI survey was the only one to include questions about employment. Nearly three-quarters (74%) of the panelists said they were employed full-time, part-time, or self-employed. About 13% indicated they were retired. Students and the “not employed” made up the smallest percentages (5% and 8% respectively).

Of the employed panelists, a total of 20% said they were employed in the print (12%), broadcast (4%) or online media (4%) categories. About 15% were employed in technology development and 5% in telecommunications. About 6% said they were employed in media education, training or consulting; 5% in advertising, marketing or public relations.

Half of the employed panelists indicated that they were not employed in any of the previously listed media-related categories. The panelists entered more than 50 different employment categories in an open “Other” field. The 10 most frequently entered other categories were health care/medical, (non-media) education, law, finance, government, information technology, sales, manufacturing, real estate, and construction.

HOW MUCH TIME ARE PEOPLE SPENDING WITH IPADS?

Time spent per day: About 63% of the 2010 RJI survey respondents reported that they spent more than an hour a day with their iPad, with more than 28% saying they used their iPad more than two hours a day.

Interestingly, the 2011 RJI Survey found that employed panelists with non-media related jobs spent more time with their iPads than those with media-related jobs. More than three-

quarters (77%) of the employed panelists with non-media jobs said they spent more than an hour per day with their iPads. Slightly more than half (58%) of the employed panelists with media-related jobs said they spent the same amount of time with their iPads.

The 2011 Google survey found that 68% of its respondents were spending more than an hour a day on their media tablet, with 38% saying they spent more than two hours a day with their media tablet. The Google survey also found that 43% of its respondents were likely to spend more time with their media tablet than with their desktop or laptop computer.

Time spent consuming news: Nearly half (49%) of the 2010 RJI survey respondents said they spent an hour or more during a typical day consuming news on their iPad. More than three quarters (79%) of the respondents reported that they spent at least 30 minutes per day consuming news on their iPad. The respondents who said they spent a similar amount of time consuming news with other media did so at a much lower rate: television (53%), personal computers (51%), printed Sunday newspapers (31%), and printed weekday newspapers (19%).

Satisfaction: More than nine out of 10 respondents to the 2010 RJI survey rated their overall satisfaction with the iPad as either very satisfied (70%) or somewhat satisfied (23%). More than three-quarters (76%) indicated that they were very likely to recommend the iPad to a friend or relative.

When the satisfaction question was asked again in the March 2011 RJI survey, nearly 70% of the panelists said they were either much more satisfied or somewhat more satisfied with the iPad. Only 4% of the panelists said they were somewhat more dissatisfied. None said they were much more dissatisfied.

The April 2011 OPA survey found that 89% of the respondents who said they owned or used a media tablet were either very satisfied (50%) or somewhat satisfied (39%). Only 1% said they were not at all satisfied.

WHERE AND WHEN DO PEOPLE SPEND THE MOST TIME WITH IPADS?

Where: Nearly three-quarters (73%) of the 2010 RJI survey respondents reported that they used their iPad most frequently at home. About 82% of the 2011 Google survey respondents said they used their media tablets primarily at home. About 58% of the 2011 OPA survey respondents said they used their tablet mostly at home. In the March 2011 RJI survey, more than half (51%) indicated they most frequently used their iPad at home while sitting on a

couch or easy chair; 17% said they used it mostly in the bedroom. The 2010 AP survey found that 79% of the respondents used their iPad mostly at home to consume news.

When during the week: Nearly 9 out of 10 (89%) of the 2010 RJI survey respondents indicated that they used their iPad consistently throughout the week. Nearly 7 out of 10 of the respondents to the 2011 Google survey said they used their media tablet more frequently on weekdays (69%) relative to weekends (31%).

When during the day: In the 2011 RJI survey, the panelists were asked to check the two time periods during the day when they spent the most time with their iPads in a typical week. More than half (51%) said that they used their iPads mostly in the evenings between 8 and 11 p.m. The next most popular time period with 37% of the panelists was mornings between 5 and 8 a.m.

The 2011 Google survey found that 62% of the respondents used their media tablet more frequently during the night.

WHAT ARE THE MAIN USES FOR IPADS?

News consumption: In the 2010 RJI survey, 84% of the respondents selected “Following breaking news reports and current events” as their most popular use for the iPad. Next based on popularity were: “Leisure reading of books, newspapers and magazines” (82%); “Browsing the Web” (81%); and “e-mailing” (76%).

Nearly all of the RJI respondents (99%) indicated that they used their iPad for some period of time during the day to consume news. Less than 9 out of 10 respondents (89%) said they used a personal computer for some period of time during the day to consume news.

The 2010 AP survey found that “Reading news” ranked first, with 78% of the respondents selecting it as their top activity on the iPad, with 43% indicating that the iPad was their primary source for up-to-date news. The AP survey also found that 67% of the respondents used their iPad two or more times a day to check for news updates. The 2011 RJI survey found that 63% of the panelists used news apps two or more times a day to access news and feature stories or timely updated information on the iPad.

“Reading the news” ranked fourth in the 2011 Google survey with 61% of the respondents selecting it as one of their most popular uses for media tablets.

Another encouraging finding for print journalists from the AP survey was that a majority (58%) of respondents said they preferred longer text stories that help explain the news. Only nine percent of all respondents said they preferred video news stories. However, age was a clear factor for the preferences. In the 25-34 age group, 55% said they preferred longer stories and 14% said they preferred video news stories. In the 45-54 age group, 61% said they preferred longer stories and only six percent said they preferred video news stories.

Other uses: 62% of the AP survey respondents reported that they used their iPad mostly for personal activities. Another 34% said they used it about equally for work and personal activities. Only four percent said they used their iPad mostly for work. Other than consuming news, the main uses for the iPad selected by respondents to the AP and RJI surveys were general web browsing, emailing and reading eBooks.

In addition to gaming, which was selected by 84% of the Google survey respondents and “Reading the news” (61%), more than half listed “Searching for info” (78%), “Emailing” (74%), “Accessing a social network” (56%) and “Consuming entertainment” (51%) among their top uses. Only 13% of the AP survey respondents list gaming among their main uses. About 66% of the 2010 RJI survey respondents selected “Entertainment (games, videos, music, etc.)” as one of their main uses. In the March 2011 RJI survey, about 29% selected gaming and 30% selected social networking.

In the April 2011 OPA survey, 52% of the respondents who owned or used a tablet said they had purchased game apps. Only 10% had purchased news apps, which is not surprising since nearly all news apps as of April 2011 were free to download.

In all of the surveys, respondents gave shopping relatively low rankings when asked about their main uses for media tablets. However, shopping could become a major growth area in the next few years as more women acquire media tablets and shopping features become more efficient and ubiquitous within tablet apps.

WHAT ARE THE MOST POPULAR IPAD NEWS APPS?

Preference for apps: The 2010 AP survey found that 73% of the respondents preferred reading news within news apps on the iPad compared with 20% who said they preferred reading news within the Web browser.

In the 2010 RJI survey, more than nine out of 10 respondents said they were either very likely (72%) or somewhat likely (21%) to use a newspaper's app for reading news and feature stories as opposed to using a Web browser to navigate the newspaper's website.

Most frequently used apps: When panelists in the March 2011 RJI survey were asked in an open question to list the three apps they used most frequently with their iPad, Safari (21%) and Mail (20%) ranked first and second. The New York Times (13%) ranked third, USA Today (10%) fourth, and AP News (8%) fifth. About two-thirds (67%) of the panelists indicated that they regularly accessed three or more different newspaper apps on their iPad.

When RJI panelists were asked in another question to check all news apps they regularly used from a list that included 22 news apps plus an open field for "Other," the top 10 choices were as follows:

- | | |
|------------------------------|----------------------------------|
| 1. The New York Times (51%) | 6. ABC News (32%) |
| 2. USA Today (46%) | 7. The Wall Street Journal (30%) |
| 3. AP News (42%) | 8. NPR (29%) |
| 4. The Weather Channel (41%) | 9. Flipboard (28%) |
| 5. CNN (34%) | 10. BBC News (25%) |

Content preferences: The four categories of news and features that the RJI panelists selected as the ones they most frequently accessed on their iPad were as follows: (The question included a list of 11 choices plus an open field for "Other; panelists were asked to select their top four.)

- | | |
|-----------------------|-----------------------------|
| 1. General News (89%) | 3. Weather (51%) |
| 2. Technology (53%) | 4. Business/Financial (43%) |

The 2010 AP survey found that besides general news, the respondents most frequently accessed content about weather forecasts (74%), stock prices (36%), sports scores (32%), and movie times (24%). This suggests that iPad users might prefer the larger iPad screen to the much smaller smartphone screen even for "quick hits" of news.

HOW ARE TABLETS LIKELY TO INFLUENCE SUBSCRIPTIONS TO PRINTED NEWSPAPERS?

Likelihood of canceling print subscriptions: While the likelihood that iPad users will cancel their subscriptions to printed newspapers in the next six months remains high, the negative impact on most newspapers should not be significant, at least in the short term. The number of newspaper subscribers who also own iPads still is relatively small in most markets.

Of the 931 (59% of the total) respondents in the 2010 RJI survey who implied that they currently subscribe to a print newspaper, more than half (54%) indicated that they were either very likely (32%) or somewhat likely (22%) to cancel their printed newspapers subscription and switch to a subscription-based digital version on their iPad within the next six months.

There was a statistically significant, moderately strong, positive correlation between iPad news consumption and the likelihood of canceling their print subscriptions. For example, more than half (58%) who said they used their iPad at least an hour a day for news indicated that they were very likely to cancel their print subscriptions within the next six months.

More than three out of 10 (31%) respondents indicated that they did not subscribe to printed newspapers in the 2010 RJI survey, with more than one out of 10 (11%) saying that they had already canceled their subscriptions to printed newspapers and switched to reading digital newspapers on their iPad.

When the question was asked again in the March 2011 RJI survey, of the 353 (63% of the total) panelists who implied that they subscribed to a printed newspaper, about 38% said they still were very likely or somewhat likely to cancel their print subscription within the next six months. Only 5% of the March panelists said they had actually canceled their print subscription since purchasing an iPad.

Likelihood of purchasing an iPad newspaper subscription:

There may be a silver lining for newspaper publishers in the transition from ink-on-paper subscriptions to digital subscriptions of iPad/tablet editions. When panelists in the 2011 RJI survey were asked how likely they were to purchase a subscription to a newspaper iPad app edition within the next six months, nearly half (45%) indicated that it was very likely or somewhat likely. About six percent said they had already purchased a subscription to an app-based newspaper on their iPad.

More than a third (36%) of the RJI panelists said they were either very likely or somewhat likely to subscribe to “The Daily” newspaper developed for the iPad by the News

Corporation. (This is a significant percentage, given that “The Daily” was launched in February and began charging for subscriptions in mid March just before the RJI follow-up survey went online.)

The 2010 AP survey found that a quarter of the respondents had a paid subscription to newspapers in some format.

Influencing factors: In the 2010 RJI survey, when asked in an open-ended question what factors would influence their decisions to purchase news apps or newspaper subscriptions on their iPad, the respondents mentioned "a price lower than the price of a print subscription" most often. The respondents also indicated that they want a very easy-to-use and reliable app, with access to most of the content available in the printed edition. While respondents mention video and interactive features, they were much less commonly expressed in the survey than the aforementioned issues.

Nearly half of the 2011 OPA respondents who said they owned or used a media tablet indicated that they found ads relevant, unique and interesting within newspaper and magazine apps.

These findings suggest that a significant number of iPad users are candidates to add to the (digital) subscriber rolls of newspapers. And that advertising within iPad editions has the potential of generating significant revenue for newspapers.

WHAT OTHER ELECTRONIC MEDIA DO IPAD USERS OWN?

Other devices: When the panelists in the 2011 RJI survey were asked to select all devices they currently owned from a list with 14 choices, this is what they indicated in ranked order:

- | | |
|----------------------------------|-----------------------------------|
| 1. Apple iPod (55%) | 8. Other desktop computer (30%) |
| 2. Apple iPhone (54%) | 9. Other smartphone (23%) |
| 3. Apple MacBook laptop (44%) | 10. B&N Nook eReader (14%) |
| 4. Other laptop (42%) | 11. Netbook computer (14%) |
| 5. Amazon Kindle eReader (36%) | 12. Other eReader (14%) |
| 6. Apple iTouch (35%) | 13. Tablet PC w/Microsoft OS (4%) |
| 7. Apple Macintosh desktop (35%) | 14. Other media tablet (2%) |

In another follow-up question, three-quarters (75%) of the RJI panelists said they were very unlikely to purchase a competing media tablet to the iPad within the next six months compared with eight percent who said they were very likely to purchase an iPad competitor.

In the 2010 RJI survey, nearly six out of 10 (58%) respondents implied that they had used an e-reader for some period of time prior to taking the survey. Of those, about 30% indicated that they had used it to consume news during a typical day.

HOW DOES THE IPAD READING EXPERIENCE COMPARE WITH OTHER MEDIA?

Comparison to print and smartphones: Nearly three-quarters (73%) of the 2010 RJI respondents rated their reading experience with the iPad as being much better than (42%) or somewhat better than (31%) their reading experiences with printed newspapers. About 14% said reading on the iPad was about the same as reading a printed newspaper.

Nearly two-thirds (65%) of the respondents rated their reading experience with the iPad as being much better than (32%) or somewhat better than (33%) their reading experience with printed magazines.

Nearly three quarters of the respondents rated their experience with reading on the iPad as much better than their reading experiences with iPhones (65%) or other smartphones (75%).

Tablet users in the 2011 OPA survey said they preferred reading on a tablet to reading online on a computer (66%), on a mobile phone (65%), a newspaper (58%), a magazine (57%), or on an e-reader (54%).

The age factor: The age of the user tends to influence how one rates reading experience on the iPad compared to other media. For example, the older the users, the more likely they are to rate their reading experience on the iPad worse than their reading experience with printed newspapers and magazines. On the other hand, older users also tend to rate their iPad reading experience much better than electronic devices with smaller screens, such as iPhones, smartphones, and netbooks.

As might be expected, comparative media experience was strongly related to traditional media use, particularly with newspapers. For example, the more that respondents had read

printed newspapers in the past 30 days, the worse they rated iPad reading experience compared to reading a printed newspaper.

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The Donald W. Reynolds Journalism Institute works with citizens, journalists and researchers to strengthen democracy through better journalism. RJI seeks out the most exciting new ideas, tests them with real-world experiments, uses social science research to assess their effectiveness and delivers solutions that citizens and journalists can put to use in their own communities. More information can be found at <http://www.rjionline.org>.

The Digital Publishing Alliance (DPA) is a member-supported program of the RJI that mostly includes newspaper publishers and news organizations in the United States. More information can be found at <http://www.rjionline.org/digital-publishing-alliance>.