We Were Promised Jetpacks:
The Digital Magazine Non-Revolution
and the Waning Promise of an Enhanced Content Explosion

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## Abstract

Magazine publishers greeted the introduction of mobile tablets, particularly the Apple iPad, with optimism. Some launched lavish apps for numerous titles. But by the summer of 2013, magazine publishers had scaled back their ambitions, struggling to identify a mobile strategy that aligned with the desires of advertisers and audience while generating revenue. This study analyzed 24 U.S. magazines in an attempt to determine their strategies regarding tablet content and distribution. The results suggest that tablets have not transformed the industry—yet. However, publishers should continue to experiment, even as they wrestle with the proliferation of devices and operating systems; audience adoption; advertiser acceptance; and standardization.

**Keywords:** digital media, magazines, mobile strategies, publishing, tablet content

## Introduction

The Apple iPad hit the market with great fanfare on April 3, 2010, a short 4½ years ago. Even before it was released, magazine publishers harbored high hopes that the iPad would transform their editorial and economic model. In retrospect, those high hopes look a bit naïve. The industry's enthusiasm has tempered a bit as the realities of digital publishing have set in. Companies have had to innovate in the mobile space while at the same time maintaining their print and web properties. That has proved difficult, given that publishers have yet to effectively monetize their existing web properties and are continually shrinking editorial staffs.[1]

By mid-2013, our research shows, publishers had arrived at a more measured and realistic understanding of mobile and were still seeking a sound, focused strategy – for advertising, circulation, and editorial – that would make their investment in mobile worthwhile.

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For this study, we wanted to examine the current state of digital magazine publishing. We did so by looking at a sample of top titles. We attempted to identify the types of enhanced content the top titles produced, how that content was produced or acquired, and how designers presented content for optimal iPad consumption.

Before discussing methodology, findings, and analysis, some background on the short but tempestuous relationship between publishers and tablets might provide helpful context. In less than five years, mobile has profoundly disrupted long-held advertising, circulation, and editorial models of the magazine industry. Outlined below is the chronology of this disruption.

## 2009

Magazine publishers were reeling from the economic collapse of 2008 and the resulting plummet in advertising revenue. They had made a costly mistake of discounting content too deeply to readers, and instead relying heavily on advertising revenue.[2] And, like newspapers, magazines were giving away their online content for free at a time when online advertising was selling for pennies on the print dollar.

Rattled and weakened, publishers scrambled to rectify that mistake. Their infatuation with the iPad began when it was still in the early stages of development, long before its release in spring 2010 transformed the market. Tablets and mobile were seen as one way to make up some of the ground lost by discounted content and plummeting advertising revenue. Publishers hoped that with tablet magazines, they could charge their readers more and attract new advertising. "The Apple iPad fanned publishers' hopes that, after failing to make a meaningful business from their Web sites, they could finally make a buck off their digital content."[3]

Of course, Apple wasn't the first or only player in tablet development. By 2009, several mobile devices or prototypes already existed or were in development, including the Amazon Kindle, Sony Reader, JooJoo, Microsoft Courier, Google Tablet, and Hearst's Skiff Reader.

But Apple's entry into the tablet market was only a matter of when, not if, and some magazines moved aggressively to envision their future on what would become the iPad. *Sports Illustrated* (in December 2009) and *Wired* (February 2010) released slick concept videos showing digital magazines flush with rich graphics, multimedia, interactivity, social sharing, updated content, dynamic advertising, and a refined, natural user experience. Publishers hoped that readers would be willing to pay more for such rich content. "We think it's an opportunity to reset the economics," said Chris Anderson, then *Wired*'s editor-in-chief. "For the first time, people may value this experience so much that they'll pay for it."[4]

## 2010

The iPad hit store shelves in the spring, instantly dominating the market. Many of the tablets or slates that had been in development by Apple's rivals were canceled, postponed, or never made it out of the starting gate, including the Microsoft Courier, the Google Tablet, and Hearst's Skiff Reader.[5] The iPad leapfrogged the e-readers that preceded it because it mimicked a print magazine experience, provided a platform for rich media, and offered a vastly improved user experience. Apple sold 3 million iPads in the first 80 days.[6] Still, by mid-2010, only 4 percent of American adults owned a tablet.[7]

Many analysts and editors were wildly optimistic that the iPad (and, to a lesser extent, other tablets) would transform magazine publishing, in terms of advertising and subscription revenue, enhanced editorial content, and reader engagement. But even among the optimists, there were concerns. Apple was taking a 30-percent cut of an app purchase and resisting a subscription option (rather than a per-copy purchase). More importantly, Apple refused to share readership data, the bread-and-butter data essential to a magazine's editorial, marketing, and advertising strategy.

## 2011

This was a watershed year: Tablet ownership and reader acceptance of digital magazines accelerated. "[T]he rapid growth of tablets, e-readers and smartphones is fundamentally altering the landscape for magazine publishers," the Pew Research Center wrote in its annual "State of the News Media" report. Ownership of tablets and smartphones soared in 2011, and a "sharp migration" to mobile began.[8] Ten percent of American adults owned a tablet by August 2011, and ownership accelerated toward the end of the year.[9] In its fiscal quarter that included the Christmas holiday, Apple sold 15.43 million iPads.[10] Editors detected increasing engagement with tablet publications, measured in time spent, higher readership, and increased demand.[11]

Time Inc., Hearst Corp., and Condé Nast had promised tablet versions of most or all of their titles by the end of 2011; *Time* magazine saw 11 million downloads of its tablet version; and 83 percent of magazine publishers were producing mobile content.[12]

Tablet publications were more widely accessible via Apple's Newsstand, the Kindle Fire, and the Nook, as well as on "social magazines" such as Flipboard, Zite, Pulse, Livestand, and Google Currents. The introduction of Apple's Newsstand "created a huge spike in magazine downloads."[13] But publishers began to struggle with the proliferation of platforms that, while reaching more readers, splintered their focus.

In spring 2011, Apple relented to publisher pressure and allowed readers to purchase subscriptions, rather than buy one issue at a time. The subscriptions also offered readers the option to share their name, email address, and zip code with publishers. The change was noted by the Alliance for Audited Media (AAM), which began counting digital subscriptions as a part of a magazine brand's total paid and verified circulation number in the June 2011

reporting period.[14] But Apple was still taking a 30 percent cut of each purchase through the App Store.

Digital revenues were growing rapidly but still accounted for just 5 percent of total magazine revenue.[15] And digital revenues weren't growing fast enough to offset the fifth straight year of declines in print advertising. Print subscriptions were flat, and single-copy sales dropped.[16] Thus, publishers were caught in a bind. Readers were embracing tablet editions, but producing robust content for tablet readers was costly. Although up slightly, overall revenue wasn't enough to permit publishers to invest significantly in their tablet editions.

By the end of the year, publishers were recognizing the technical and financial realities of mobile publishing.[17] Faced with the expense of developing richly enhanced apps for numerous platforms, publishers like Hearst and Time Inc. began scaling back the complexity of their offerings by the end of the year.[18] *Popular Mechanics* and *The New Yorker* found that their readers resisted excessive interactivity, so they became far more selective in choosing what elements to enhance.[19]

## 2012

By 2012, publishers had moved from thinking mobile platforms were "the future" to instead trying to figure out how to make them profitable enough to offset print losses. "Media companies know that delivering content whenever and wherever consumers want is key," wrote Eric John, vice president of digital services for the AAM. "They know digital content, including browser-based editions and mobile apps, is no longer the wave of the future, but table stakes to continue reaching and growing digital readership."[20]

An AAM survey found that 90 percent of its member publications had a mobile presence in 2012 (up from 51 percent in 2009), and 22 percent said their mobile platforms were profitable. Although mobile held enormous promise, it would be a slow and rocky transition to profitability. About three-fourths of those surveyed by AAM acknowledged "mobile revenues must stem from both advertising and circulation, up from 52 percent in 2009." More than half said that mobile represented up to 9 percent of ad revenue and up to 9 percent of circulation revenue.[21]

Reader engagement was up, and ownership of tablets and smartphones continued to climb. Twenty-five percent of Americans owned a tablet by August 2012.[22]

Meanwhile, the move away from richly enhanced tablet editions continued. "The industry overshot the interactivity early on," said Hearst President David Carey. "What we discovered is that most people just want the product itself."[23]

Print-plus-digital subscriptions grew increasingly popular. But the tough ad climate continued, and circulation revenue was still iffy. Digital revenue, though growing, was still small, and the optimism of 2010 and 2011 faded. There would be no single magic solution; rather, there would be a patchwork of solutions, and no doubt many failures along the way.

## 2013

By mid-2013, tablet editions accounted for only 3.3 percent of overall circulation.[24] While digital revenue was faring better, it wasn't by much. At Meredith Corp., for example, digital advertising accounted for 11 percent of ad revenue in fiscal year 2013.[25] The problem: The vast majority of publishers' digital revenue was generated from website advertising, not from tablets. This was the case even with tech-savvy brands like *Wired.* The title was one of the earliest magazines to generate more than half of total ad revenue from digital, in early 2012. About 90 percent of that digital revenue came from its website, however, not from its tablet edition.[26]

With digital revenue still small for most magazines and tablet revenue insignificant, publishers wrestled with a dilemma: whether to design one stellar, enhanced app for one device and fewer readers, or to design for multiple devices, reaching more people but with a lesser-quality product. "The messiness is major…," one executive told AAM. "The market is going crazy right now in every direction. We're just trying to hang on until things shape up."[27]

The market is likely to continue to be highly fragmented as consumers snatch up tablets. By mid-2013, 34 percent of American adults owned a tablet.[28] Worldwide, sales of tablets running on Android's operating system surged. By the second quarter of 2013, 67 percent of global tablet sales were Android devices; 28 percent were Apple tablets, either the iPad or iPad Mini.[29]

There is no single answer for how to address this continuing and intensifying fragmentation. Every publishing company is finding its own way, seeking a digital strategy that works for its titles, based on its audience and on its advertising and circulation strategy. For editors, it's a time of experimentation – with editorial content, with devices, and with operating systems – to find "the mix that maximizes reader interaction and minimizes their production staff's efforts."[30]

It was in this unsettled, complicated environment of mid-2013 that we attempted to assess the state of digital magazine publishing. We set out to measure the quantity and scope of digital magazine content. While many digital magazines do offer enhanced content, many more do not, instead opting to release replicas of their print product. This gap elicited several research questions:

**RQ1**: What kind of enhanced content, if any, was evident in the analyzed magazines?

**RQ2**: How did the analyzed magazines that provided enhanced content handle its production?

**RQ3**: How, if at all, did the analyzed magazines adapt their content and design for optimal viewing on a tablet?

The section below outlines the approach we used to answer these questions.

## Methods

First, some parameters needed to be established. Considering the multitude of variables contained within the fragmented marketplace, we established that we would use a multiple case study approach, allowing us to analyze a defined number of tablet magazines while also surveying several members of the professional community involved in creating digital editions.[31] As of July 2013, there were 4,339 titles in the Apple Newsstand store, while the number of available magazines in the Google Play store could not be credibly established. To download and sample all available products would be too costly and cumbersome.

Instead, we decided a small convenience sample of U.S. consumer magazines was more appropriate. The Alliance for Audited Media's December 31, 2012, Top 25 Consumer Magazines by Total Paid and Verified Circulation list was used as a guide,[32] ensuring that the consumer magazines with the largest reach were in the sample. We also assumed that these titles would have an established tablet presence. This was generally the case. Of the 25 magazines on the list, two did not have a digital version of any kind: *AAA Living* and *American Legion Magazine.* One, *Parenting*, was shuttered prior to the sampling date when the magazine was sold by Bonnier Corp. to Meredith Corp.[33]

Second, we needed to choose a common platform. While Android operating system tablets (the Google Nexus, the Samsung Galaxy, and Amazon's Kindle Fire, among others) have been increasing their market share, the iPad is still the dominant product in the marketplace. Fifty-nine percent of all tablet owners in the U.S. have an iPad or iPad Mini.[34] This may be changing. As previously mentioned, by the second quarter of 2013, 67 percent of global tablet sales were Android devices; 28 percent were Apple tablets, either the iPad or iPad Mini.[35] While this is something that magazine publishers will have to address in the future, many have yet to adjust to this change in the market.

Based on those factors, we decided that all sampled magazines would be native to the iPad. We downloaded the most recent issue of each magazine that was available during the week of July 8, 2013. We downloaded every title but one from Apple's App Store. Because *Ladies' Home Journal* is not available in the App Store, we examined the tablet edition available through Next Issue. (Next Issue is a consortium of five publishers that make their magazine apps available through a bundled subscription.)

Third, we thought it was appropriate to contact several of those responsible for their brand's tablet editions. Again, a convenience sample was used. Fifteen editors, designers, and user experience directors from magazine brands both inside and outside of the digital edition sample group were contacted between May and July of 2013. Of those 15, five—Carly Migliori, editorial production manager at *Fast Company;* Jeremy Young, director of user experience at *Martha Stewart Living;* Sally Abbey, executive managing editor at *Seventeen;* Scott Johnson, design director for tablet editions at *Better Homes and Gardens;* and Annemarie Conte, executive editor of *Woman's Day*—agreed and were ultimately interviewed or responded to emailed questions. Rachel Crow, Meredith Corp.'s consumer

insights research manager, was also contacted for her knowledge and understanding of tablet usage tracking and reader data. Each interviewee answered questions from a prepared 17-question pool (see Appendix), though follow-up questions varied from interview to interview. Some respondents did not know the answer to or failed to respond to all the questions.

*Definitions*

Before data could be gathered, we needed to define some terms: replica version, tablet-optimized, and enhanced content. We defined a "replica version" as a direct PDF copy of the print edition of the magazine. While some minor adjustments may have been made, including live URL links to websites or internal linking, the pages of the magazine have not been redesigned in any way to make the tablet reading experience better. These editions have no interactivity or touch elements. There is no extra or exclusive content.

A "tablet-optimized" digital magazine is significantly different. These magazines are optimized for tablet, often with every page of the magazine redesigned to take advantage of the unique properties of these devices. There are touch elements throughout the edition: text that scrolls inside dedicated boxes; buttons that bring up new content; slideshows that can be swiped through. The body copy font is often increased to make reading easier. Print pages that carry multiple short stories are now separated into individual spreads. Designs even take advantage of the multiple layers available, with swipeable content often gliding over static images to create new, captivating layouts. These "tablet-optimized" digital magazines may also have "enhanced content," but not always.

"Enhanced content" was the hardest term to define. Initially, there was little standardization in the design of digital magazines. Users often had to relearn how to interact with the content. More recently, though, digital magazines have begun sharing some common user elements, making it easier for readers to quickly interact with content rather than forcing them to learn the peculiar quirks of different magazine apps. But there are still numerous ways of "enhancing" content. For the purposes of this study, we defined enhanced content as materials that did not or could not appear in the original print edition. While a "tablet-optimized" edition might redesign pages to make it easier for a reader to use, it doesn't automatically add extra material to the magazine. "Enhanced content" and, by extension, "enhanced editions" contain that extra material, often adding videos, audio clips, slideshows, book excerpts, interactive graphics, or animated story introductions to the original content.

The lack of standardization becomes an issue here, though. Several sample magazines placed buttons on pages prompting readers to "click for video." The difference came in how that video was delivered. A video could be embedded in the application, meaning it was downloaded as a part of the edition. This kind of video does not require an Internet connection to view. Or, the button could be linked to a YouTube video, which would then pop up in the screen. This kind of video does require Internet access. Or, the button could open an external website, usually the brand's own Web page, with a video on it. The reader

could watch the video on the website, occasionally scan through other content on the site, and then return to the app via a back button. This, of course, also requires an Internet connection. For the purposes of our research we made note of which kind of video was present in the app, but deemed it all "enhanced content" because it did not appear in the print edition.

*Sampling of Content*

To answer the proposed questions, we tabulated the data in several ways. First, we counted the enhanced content in each of the sample issues. We divided the enhanced content into five subcategories: video, audio, slideshows, interactive graphics, and miscellaneous interactive content. The latter included animated graphics, book excerpts, or interactive tools, such as *Better Homes and Gardens'* "Color Studio," which allows readers to mix and match the colors and fabrics in a photo.

Second, we analyzed the origin of the content. Some magazine brands created their own videos. Others included pre-packaged videos, such as movie or video game trailers. Many applications included either complete songs or sample snippets of music, all from outside sources. The book excerpts were also from outside sources. Often, slideshows were either compiled from extra snapshots from an existing photo shoot or were candid behind-the-scenes photos with the celebrities featured in the sample issue. Only rarely did photos come from outside sources, and if they did, it was often from reader submissions.

Finally, we noted whether the magazine was redesigned for the iPad. If elements such as pop-up text, scrolling text and photos, swipeable text or photos, layering, or slideshows consisting of photos from the magazine were evident, the issue was consider tablet-optimized. We did not tally these various elements in an issue, because these data were not required to answer our particular questions.

### Findings

The first question asked what kind of enhanced content, if any, was evident in the analyzed magazines. Of the 24 titles reviewed, only 10 produced tablet editions with highly enhanced content. Another seven produced editions with moderately enhanced content. Five titles had tablet apps with no enhanced content; their apps were merely print replicas. Two magazines, *American Legion* and *AAA Living,* had no tablet editions at all.

The 10 titles that produced highly enhanced content were *Reader's Digest, People, Time, Sports Illustrated, ESPN, National Geographic, Maxim, Better Homes and Gardens, Cosmopolitan,* and *Game Informer*. The choice of which content to enhance varied, depending on the magazine's purpose and audience. *People* included celebrity photo galleries and video links to movie and Broadway trailers. Both *Sports Illustrated* and *ESPN* updated their content within the app with recent scores and news. *National Geographic* included original videos, daily photo updates, and even jigsaw puzzles made from reader-submitted photos. *Game Informer* saturated its app with 43 game trailer videos and 43 slideshows of

video game screen captures. *Maxim* featured behind-the-scenes videos and photos. *Better Homes and Gardens* focused on how-to videos and its "Color Studio" tool, which allowed readers to mix and match 18 paint and fabric patterns to create a custom room. *Reader's Digest*, whose audience skews older—61.9 percent of its readers are 50 or older[35]—was perhaps the most surprising title on the list of highly enhanced apps. It had iPad exclusive content, several videos and video links, and interactive quizzes.

*ESPN* was unusual. Its app on the iPad featured little enhanced content and was beset with balky navigation. But within the app was an option to "Go to Mag Daily," which opened up within the app. Per its name, Mag Daily was updated daily with photographs from recent sporting events, photo galleries, and videos. The enhanced content was deeply nested and difficult to find, but it was there.

Many of the magazines with "moderately enhanced content" in their apps relied heavily on so-called "tap content." Typically, a "tap" button accompanies a photo of a product or a food, and by tapping it, the reader reveals pop-up text with product details or a recipe. *O, the Oprah Magazine, Glamour, Taste of Home, Redbook,* and *Prevention* used tap content for recipes, health tips, and product guides. The other moderately enhanced apps linked to their website for dynamic content *(Southern Living)* or provided only simple in-app links to other pages *(Good Housekeeping).*

The magazines with no enhanced content essentially uploaded PDFs of their print editions. Pages weren't resized for iPad viewing, which resulted in too-small type and the frustration of pinch-and-zoom. Even when URLs were provided and, indeed promoted, they weren't necessarily live-linked. For example, *Ladies' Home Journal* urged readers, "Don't miss our delicious recipes, cute hairstyles, fashion finds, DIY projects, and more at Pinterest.com/LHJmagazine," but didn't embed a link to it.

The disparity among the sampled magazines in the amount of enhanced content reflects publishers' struggle to find the "sweet spot" between an app that provides too much or too little. In the summer of 2013, Migliori was the editorial production manager for *Fast Company*, which, like many magazines in our sample, produced an interactive version for iPad but a replica version for other products. She also had a hand in designing the digital edition for *Martha Stewart Whole Living* before that title closed. When designing a digital edition, Migliori said, it is difficult to find a balance between tablet-optimized design, enhanced content, reader expectations, and reader comfort levels.

"It's hard to figure out what you want it to look like, how much interactivity to have without bombarding readers, and the right amount of interactive elements to keep people interested," she said. "That's the key to a successful app."

Finding that balance takes time, though. After a year of working on the *Fast Company* app, Migliori said she has gained some perspective. "You realize that you don't need to have something interactive just to have it interactive. We have some things that are a

straight translation to digital, and it's fine like that. That breaks up the pacing of an issue. When we get into the feature well, that's where we blow it up with extra stuff."

The second question asked how the analyzed magazines that did provide enhanced content handle production of that content. Of the 17 magazines in our sample that provided either highly or moderately enhanced content, 12 produced at least some original content, rather than relying only on outside providers. The original content consisted of videos, slideshows, interactive graphics, audio clips, and exclusive articles that did not appear in print.

Publishers seemed to be highly selective in determining which stories merited the accompaniment of an original video. Few magazines produced original videos at all. Instead, they typically embedded or linked to videos on YouTube, Vimeo, their own website, or elsewhere. The exceptions were *People, Sports Illustrated, Time,* and *Better Homes and Gardens*, although they didn't include many original videos. Producing original video is expensive and time-consuming. *People* included a seven-minute lushly produced video that accompanied the main feature about a transgender child and her family's road to acceptance. Its quality was similar to that of a video package aired by "60 Minutes."[36] But such videos were the exception. Most original videos were considerably shorter: a Q&A with a celebrity, an introduction to a new mobile app, an interview with an athlete spliced with footage of her competing, recipe how-tos, behind-the-scenes footage of photo shoots, and so on.

"The key is to figure out what is useful and what's for show so all the money spent to come up with these features would serve the reader best," said Conte, executive editor of Hearst's *Woman's Day.* "These things cost money. Our readers, I don't think they care about them. It's not worth the time, money, and effort for us to do it."

The third question asked how, if at all, did the analyzed magazines adapt their content and design for optimal viewing on a tablet? Fourteen of the 24 titles we reviewed redesigned their magazines for optimal viewing on the iPad: *National Geographic, Better Homes and Gardens, Cosmopolitan, Reader's Digest, Game Informer, O, the Oprah Magazine, Taste of Home, Southern Living, People, Time, Sports Illustrated, Prevention, Glamour,* and *ESPN.*

Eight did not: *Redbook, Good Housekeeping, AARP Bulletin, AARP Magazine, Ladies' Home Journal, Maxim, Woman's Day,* and *Family Circle*. While we didn't expect that the titles that lacked enhanced content would have a specially designed app, we were surprised that *Maxim, Redbook,* and *Good Housekeeping*, which did offer at least some enhanced content, did not redesign their pages for optimal tablet viewing.

*Maxim* was unique in this category, though. While the brand's digital edition was counted as one of the highly enhanced tablet magazines, its digital spreads were mere replicas of the print edition with a few pixels of extra space on the right side of the screen. This allowed just enough room to add buttons in the top right-hand corner that linked to the issue's enhanced content.

Although *Redbook* had a small amount of enhanced content in the form of tap buttons, it did not redesign its pages. The failure to do that can result in an incoherent presentation, particularly when the reader sees only the left-hand page of what is, in the print edition, a spread. For example, an article titled "Beauty under $25"[37] is a spread of numbered items, with tap buttons. But on the iPad, the reader sees the left page first. While the item numbering in print flows across the spread, on the iPad, the reader sees numbering 1, 2, 10, 11, 12, 13, 15. Another spread, "12 foods all nutritionists eat," appeared equally confusing. Only the phrase "12 foods all" was visible on the left page, and the food items were numbered 1, 2, 11 and 12.

If only for the sake of clarity, magazines that do not redesign for iPad viewing should perhaps consider designing their print pages so they work as stand-alone items as well as in a spread. *Good Housekeeping* appears to do this. Although its print edition included spreads, each of the pages in the spread worked as a stand-alone. That is, text or significant photography didn't bleed across the spread, and any numbering of photography was contained to a page.

*Better Homes and Gardens* came up with a different solution regarding the issue of photography. Initially it had designed its digital edition in landscape to allow for a full view of the large photos at the heart of the brand's print version. But when the AAM changed its paid and verified circulation guidelines, allowing tablet editions to count toward a brand's overall circulation,[38] *Better Homes and Gardens* rethought its approach. Scott Johnson, *Better Homes and Gardens*' design director of tablet editions, said the brand switched to a portrait design to comply with the new guidelines, as well as to work with advertisers.

"This makes it easier for advertisers," Johnson said. "The publisher listened to the advertisers and heard that a full page ad on a horizontal page is not a full page; it's half a screen. So when we became [AAM] compliant, we switched to a vertical format. If advertisers choose, they can be in the digital edition as a part of an ad buy now."

The switch has resulted in several design changes, though. "We've done some things to retain that feel of a spread format," Johnson said. "We still have a way to view things with really beautiful images. You can tap a button and see that whole view—a landscape view of a photo. People love it. It's a nice little breather."

## Discussion

This study compared the current state of magazine tablet editions with the initial predictions and promises from four-plus years ago. Based on our findings, we conclude the following:

1. Tablet editions have not to date greatly transformed the magazine industry.

2. The creative experimentation of early issues has been reined in by several factors, including cost, lack of standardization, and the sluggish rate of audience adoption.

3. Not all brands create tablet-optimized editions, but those that do show an understanding of how to mix touch elements with standard print material.

4. Enhanced content is not often produced by the brands themselves, but instead provided by outside producers. When it is created in-house, it is likely to be behind-the-scenes, supplemental, or more in-depth content that enriches the story.

We will discuss each of these points in the subsections that follow.

*Transformation*

As mentioned earlier, two of the 24 magazines in our sample, *AAA Living* and *American Legion,* did not have tablet editions. While both of these magazines have significant audiences, it appears that their publishers have decided not to invest in a digital version. Part of the reason might be that each is an organizational publication rather than traditional consumer magazine. They are products produced primarily for the organization's members and as a promotional rather than a profit-making tool. As a result, there is less commercial incentive for those publications to experiment with a digital edition. Only three other titles in the Alliance for Audited Media's December 31, 2012, Top 25 Consumer Magazines by Total Paid and Verified Circulation list are organizational publications: *AARP Magazine, AARP Bulletin,* and *National Geographic.* Only one, *National Geographic,* would be considered to have a highly enhanced digital edition. The other two publications use replicas.

Although this sample would indicate that, in 2013, it was unnecessary to have a tablet edition to be a successful magazine, it is unlikely that this will continue to be the case going forward—even for organizational magazines. Though tablet editions do not yet account for a large portion of most brands' circulation, there are multiple incentives for magazine publishers to actively increase those numbers. The largest incentive, of course, is economic. A reduction in printing and distribution costs would help any magazine's bottom line. "Company-wide, there was a lot of excitement for tablets because they were going to save us a lot on printing and shipping costs," said *Woman's Day*'s Conte.

The other incentive is the ability to track and measure reader usage. The more readers open and interact with a brand's digital edition, the more data that brand has to process in regard to readers' preferences for digital content and delivery. According to Meredith's Crow, these data can then be used to create an even better product.

"By tracking how many people are in an issue, the time they are in an issue, how many video starts there are, and what sort of interactivity usage we have in an issue, we're trying to learn how people are reading the magazine and what topics are getting the most attention," Crow said. "We can't necessarily do that for print because [reader usage] is self-reported."

Before publishers and researchers can obtain accurate data, more people need to own tablets and let go of their traditional print subscriptions. This, by all indications, is still a ways off. "Adoption has been slower than we all thought," Conte said. "The company

[Hearst] has since pulled back expectations based on adoption." Magazine brands have encouraged digital edition adoption by selling bundled subscriptions that deliver the print product to the reader's door and also provide access to the digital product. This, along with other marketing tactics, has slowly increased digital circulation numbers. The AAM's decision to count digital circulation as a part of a brand's overall paid and verified number is a testament to that. But the growth of digital editions, like the growth of a traditional circulation, is a slow process. Even so, those unprepared for the changes, who have not established their digital brand and built up enough institutional knowledge to launch, maintain, and iterate a digital publication, might be unable to deal with quickly changing industry paradigms.

*Efficiency and Audience*

Some of the earliest tablet editions featured moving covers, spinning graphics, and innovative tools to help readers discover more about the content. As our sample has shown, a significant number of publications are still producing a highly enhanced digital edition. Some, though, have begun to simplify and standardize their tablet magazines.

"For the first year [of our tablet edition] we were seeing what we could do, just learning and experimenting," *Better Homes and Gardens'* Johnson said in June 2013. "The last six to nine months have been about becoming more efficient."

There are multiple reasons for this change, including cost, audience expectations, and production time. As mentioned earlier, there has been an explosion of devices and sizes. Redesigning each issue and all of its interactive elements to fit various screen sizes demanded production teams spend significant amounts of time reworking layouts. But in recent months many brands have been tracking usage as a way to determine which devices attract the most readers and therefore would also get the most enhanced content.

"We realized that 85 percent of our market was for iPad, so we went to one design version for that product," Johnson said. Other devices carry a PDF replica of the print edition.

Johnson also revamped the design process to make the conversion from print to tablet less time consuming. Digital editions are often designed after a print edition has been shipped. The deadlines are tight. To make the conversion quicker, Johnson built templates for pages that the production department, which normally handles only the coding portion of the conversion, can use to design simple layouts. He no longer has a hand in redesigning *Better Homes and Gardens'* recipe pages. "It makes things a lot faster," he said. It also means that there are fewer opportunities for Johnson to experiment with those pages.

Usage data also allows brands to focus their creative budgets on enhanced content that the audience actually interacts with. If a how-to video gets twice as many views in a tablet edition than does an extended documentary package, brands will shift their budgets toward generating higher trafficked content.

"The key is to figure out what is useful to your audience and what's for show," *Woman's Day*'s Conte said. "All that money spent to come up with these features should really serve the reader best. That's what's important."

Based on our findings, readers and brands see the feature well as important. Enhanced content was often, though not always, paired with features and frequently added an extra layer of service to the story. This makes sense. Readers engage with features longer, looking for a more complete understanding of issues, trends, and people. A feature on summer reading in *O, The Oprah Magazine* stretched across multiple spreads and highlighted more than 30 books. Adding book excerpts from each of those titles allowed readers to sample works they were interested in before making a purchase. *Game Informer* included video trailers and game screen captures with nearly all of its features and game reviews, not only providing the brand's opinion about the game and a look at its creators, but also giving readers a chance to study the game and see how it really plays. Even behind-the-scenes footage, like *Glamour*'s video on pop group One Direction, can add service to the magazine's cover story, in this case allowing readers a glimpse of the band goofing around during its photo shoot.

When *Better Homes and Gardens* initially produced videos for its digital edition, the clips didn't always fit the core missions. "We often created slice-of-life videos," Johnson said. These included videos that were as much about the cookbook author as they were about the recipes she was demonstrating. Other videos were walk-throughs of a remodeled house rather than specific tips on handling individual projects. But after analyzing user metrics and asking for reader opinions, the brand pivoted, abandoning those slice-of-life videos for something more core to the magazine's mission: how-to videos. "Our readers wanted more how-to videos," Johnson said. "We've found ourselves at that place where we know what people love and can plan for what people want."

Serving audience needs has also made planning easier and reduced costs. Johnson and others identify stories with a "high how-to value" and then schedule a simultaneous video and photo shoot, creating all of the art assets for a story in one session. This sort of planning and reader focus helps explain why *Better Homes and Gardens,* in a tie with *National Geographic,* had the highest number of in-house created videos of any brand in our sample. It also explains why many other videos, such as those featured in *Maxim, Glamour,* and *O, The Oprah Magazine* were behind-the-scenes videos: They are cheap and easy to create, while also providing digital readers the extra content they expect.

Although some magazines have found that elusive balance of interactivity, others have abandoned it altogether. Example: *Seventeen.* According to Executive Managing Editor Sally Abbey, *Seventeen* spent two years investing in enhanced and tablet-optimized content. Initially it went well. "The readers loved it," Abbey said. "They loved that the issue was delivered right to their tablet and that they would get videos and flipbooks to play around with it."

But Abbey acknowledges there was a serious flaw with *Seventeen's* digital strategy: a gap between the magazine's audience and device ownership. While 37 percent of teens own a smartphone,[39] only 23 percent own a tablet.[40] "The teen audience just doesn't have the devices," Abbey said. "They don't own iPads. They have iPhones. Maybe they would use their parents' iPad, but that wasn't as widespread as we thought it would be."

In December 2012, *Seventeen* abandoned its enhanced edition for a cheaper replica of its print product. "When you look at the number of readers, it didn't make sense," Abbey said. "There isn't ROI there. Ten years down the road it might make sense."

*Tablet-optimized design*

The *Cosmopolitan* digital edition dares you not to touch it. Page after page of the app featured scrolling text tucked in caption-sized boxes, swipeable product stories with art that glided over static headlines, and tappable slideshows that featured one image after another. Very few digital spreads resembled the print pages they were translated from. Of all the digital editions in the sample, *Cosmo's* was the most tablet-optimized. It felt native.

This is because *Cosmo's* designers have kept two things in mind: the reader's expectations and the tablet's capabilities. Touching an object or button, or swiping through layered content, is a much more natural method of interaction than traditional input devices such as a keyboard or mouse, and those interactions yield interesting and visually pleasing results.[41] The designers at *Cosmo* understand this. Users must touch the tablet screen to read the content. Without contact, readers would miss half the magazine.

Of course, *Cosmo* was not the only digital edition that demanded readers use their fingers to read. *Reader's Digest* had several interactive games that revealed answers when users touched a map. *National Geographic* contained a page full of jigsaw puzzles made from reader-submitted photos. The best in our sample created an explicit connection between the content and the tactile. They didn't merely require readers to tap a button for extra content, and they absolutely avoided gestures like pinching and pulling, something required with viewing many replicas just to read a story. They instead made touch as essential to the experience as words and art.

This created a distinction for us. For a digital edition to be truly successful, we believe that it must first be tablet-optimized. A digital edition does not need to have videos, interactive graphics or animated story introductions to be native to the device. Those elements enhance the content, but they do not make a digital edition feel like it was conceived exclusively for a tablet and then translated to print. Active touch makes a digital edition feel native. Touchscreens create the expectation that you can interact not only on the individual buttons, but on the screen's canvas itself.[42] As brands transition from a print-focused model to a digital-centered model, they must give readers an experience that allows users to use the whole screen.

There are obstacles, though. "Right now, there isn't an industry standard," Meredith's Crow said. "When we're doing user testing, we watch someone read an issue. The

first time they open it they have to figure it out. A lot of times we see front-to-back reading, people swiping like mad to get to the back of the book even though we have three or four navigation options."

Readers do this because they understand how a print magazine works. But digital editions can be very different. Some magazines keep stories as spreads that extend over several horizontal pages. Others build stories vertically while the magazine itself moves in the traditional right-to-left manner. Still others start users at a TOC page and have them jump to various stories in the magazine before returning to the TOC to discover another piece of content, thus eliminating the traditional flipping process all together. Some brands have scrubbers at the bottom of the page, which allow users to glide through thumbnails of a digital edition's pages and select which they would like to view. Others have links at the top of each page to take readers to various departments in the magazine. Some have a back button. Others force readers to flip through every page. And, of course, there are multiple combinations and variations on these forms.

When a reader interacts with a digital edition for the first time, she needs to relearn how to access the content. People rely on visual cues and past experience to figure out when and how gestures might apply to each new app.[43] When there is so much variation between tablet editions, though, readers cannot rely on prior experience to always be a successful guide. Instead, readers are dependent on visual cues to guide them through an app. Good tablet design invites touch with clear tap targets that encourage exploration.[44] When those visual clues, such as arrows or the word "scroll," are small they can sometimes go unnoticed if they are placed too subtly within the design. Similarly, if the gestures needed to manipulate a digital edition don't resemble something done to a physical object, the more difficult it is for a user to figure out how to successfully navigate a magazine app on her own.[45] This makes it difficult for people to access the content.

## Conclusion

To date, tablet editions have not produced the revolution in content and distribution originally trumpeted by those inside and outside the magazine industry. But tablet publishing is in its infancy, and we believe that magazines are missing an opportunity to increase print-to-digital conversions. Like music and movies before them, magazines are in the middle of a hardware transition. Music moved from records to tapes to CDs to MP3s, while movies transitioned from videotapes to DVDs to Blu-Ray to streaming. To make those transitions successful required an alignment of hardware, distribution and audience incentives. By January 2014, 42 percent of U.S. adults owned a tablet.[46] That number will only grow. Soon tablet ownership will hit a critical mass, eliminating the hardware barrier for digital magazines. Distribution, while not ideal (just try browsing the magazine apps in the Google Play store), is already in place.

Magazine brands have to overcome the lack of audience incentive to switch to a digital publication. An increase in sound quality prompted the transition from tapes to CDs. Convenience hastened the transition to MP3s. But a replica-version magazine provides the

reader zero incentive to make the transition. In fact, because the print edition shows up at the door with no effort from the reader, downloading a replica version is less convenient than opening a print copy of the magazine. And while an enhanced version of the magazine brings extra value to the reader, one full of outside content that could just as easily show up in a reader's Facebook feed or Twitter stream doesn't distinguish itself enough from other forms of media. Only by creating compelling app-only content, be that a video, a digital tool, a game, or a slideshow, will publishers truly give readers an incentive to abandon their print subscriptions for a digital one.

But, as mentioned before, few magazines created content that required additional reporting or harder-to-obtain footage. *People'*s seven-minute video stands out as the best of these. While we do believe that video will eventually become more crucial to digital editions, lengthy and highly produced videos such as *People'*s are likely to continue to be rare. As brands continue to refine their tablet magazines, they will focus further on reader wants and needs, using metrics to build a more targeted product. Few magazine brands traffic in the kind of in-depth journalism that would allow for a seven-minute video. More magazines emphasize service journalism. This style of journalism lends itself more to how-to videos or behind-the-scenes clips that add value to the reader but don't drain budgets. We predict that more brands will begin making this style of video rather than spending more on in-depth video packages.

Yet, as budgets get tighter, we contend that the volume of these kinds of in-house produced videos will continue to be dwarfed by content that comes from outside providers. It is easier and cheaper for magazines to accept free content such as movie and game trailers, book excerpts, song clips, and screen captures than it is to create their own materials. These are the PR stills of the digital age. They still provide service to the reader, which is the ultimate goal, but loading apps with outside content obtainable elsewhere is ultimately less valuable in the long term for magazine brands than creating their own enhanced content.

We also believe that brands must be simple and consistent in their design, truly addressing how users interact with their digital edition, to promote complete immersion in the content. Brands must find a delicate balance. To promote a transition from print to digital, a brand's app must be tablet-optimized. It must give readers the experience they want. But to eliminate user confusion and frustration, the user interface on that tablet-optimized app must be intuitive. As our sample shows, this is not an easy balance to achieve.

The need to produce better content and better design creates a chicken-or-egg problem for magazine brands, though. Currently, few advertisers pay to appear in tablet editions. Even fewer pay to have an interactive ad. "We actually have a lot of advertisers who pull their ads out of the digital edition," said *Fast Company'*s Migliori. "A lot of the advertisers don't want interactive content." Until advertisers opt to pay to be in digital editions, there will likely not be enough money to sustain exclusive content creation. Audiences won't make the transition from print to digital until there is an incentive for them to do so. Advertisers won't pay to be in digital editions until there is a substantial audience to

justify the expense. Magazine brands can affect that cycle by increasing budgets for enhanced content production.

## Appendix

The personal interviews with members of the industry were conducted between May and July 2013. Six agreed to be interviewed or to respond to questions via email. The following questions were asked of each respondent, with follow-up questions individualized based on their answers.

1. On which platforms and in what tablet sizes is your tablet edition available? If multiple, which platform performs the best for your magazine?

2. What software do you use for your tablet edition (Adobe Digital Publishing Suite, Mag Plus, etc.)? Do you use the same software for each version? (Example: "Fast Company" uses Adobe DPS for its iPad edition but posts a PDF version of its magazine to all other tablets.)

3. Do you handle the conversion and posting to the various stores in house? If not, do you work with an outside provider or a centralized (corporate) team?

4. How long does it take to prepare the tablet version?

5. How many staff members work exclusively on the tablet version?

6. Is the print version complete before the conversion to a tablet edition begins?

7. When are "enhanced" elements proposed during the editorial process?

8. Who handles the creation of "enhanced" elements? The writer? Designers? Multimedia editors?

9. Is there a set number of "enhanced" elements in each issue? If not, is there a minimum?

10. Does the digital version always hit newsstands the same day as the print version? If not, why not?

11. Has the digital version expanded readership?

12. Are there sections of the magazine that are more successful in the digital version than print?

13. Do digital-edition metrics ever come to bear on editorial decisions?

14. How is advertising handled in your digital edition (flat ads direct from the print version, specially created interactive digital ads, a hybrid of materials, etc.)?

15. Do advertisers pay separately for digital edition ads?

16. How does your tablet edition fit into your overall circulation goals?

17. What were the most difficult hurdles in building the digital edition into your editorial routine? How did you address them?

18. What do you feel was your most successful digital edition piece and why?

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