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Canadian magazine digital editions: affordances and engagement

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Abstract

This paper is an analysis of print based Canadian consumer magazines, studying a selection of titles and their equivalent digital issues. It investigates how publishers are currently integrating a variety of digital platforms, and interactive approaches. These digital affordances are categorized as those that ‘extend’ the use of content, similar to navigation tools, such as searching for text within the issue, links to other articles, as well as the ability to learn more, or to save an article. Features used to ‘enhance’ the content include multimedia such as image slideshows, videos, and audio. Overall, the use of interactive elements in digital editorial content is relatively low, appearing in less than half of the issues. Video is leveraged in just over a third of these interactive examples. The use of interactivity affordances in advertisements is significantly lower. Publishers also support their digital and print editions by leveraging a variety of digital engagement tools. These include social media accounts for the magazine’s brand, as well as supporting the ability for their audience to share some level of content through social media. Other engagement tools such as the production of a digital newsletter, the availability of digital archives (back copies), editorial updates, commentary sections, and ‘email the editors’ are also investigated. These affordances and engagement approaches are compared with available circulation data in an effort to identify trends and patterns. This study forms a useful benchmark for how Canadian publishers are currently leveraging digital infrastructure. It highlights how publishers today may be focusing their efforts on specific devices and platforms, native apps for tablets and the iOS, while their readers and potential audience have shifted to mobile smartphones.

Keywords: content analysis, market analysis, mobile media, native app

1. Introduction and background

This paper is a media content analysis undertaken on a selection of print based Canadian magazines, showing how they are currently integrating a variety of different digital edition formats. It reviews the different platforms used, as well as the use of interactive affordances in editorial and advertising content. In addition, it also captures the use of different digital engagement techniques publishers are using to help build their audiences. These approaches are considered along with current market trends for devices and platforms, as well as the title’s overall digital and print circulation rates.

1.1 Background

Apple first introduced the iPad tablet in April 2010 (Ritchie, 2017), and the resulting market for tablet devices shifted the way readers explore and consume

media content. This shift presented a fresh opportunity for conventional print-based publishers to re-engage with their audiences, which had been moving online for some time, through leveraging a familiar magazine format within a new framework for the digital economy.

However recent industry reports have indicated that, as an overall industry, publishers may not have capitalized on this opportunity (Malyarov, 2017). Today’s rise in the use of smartphone devices (mobiles) may present a renewed opportunity for consumer magazines to engage their readers, and monetize their content.

Note that tablets, in general, are not considered ‘mobile’ devices. In North America, the majority of tablets sold connect to the Internet via Wi-Fi. They do not have SIM (Subscriber Identity Module) cards installed (Heine, 2014), which are required to connect to cellular service

providers. As such in this paper ‘mobile’ is used to refer to smartphones, and does not include tablet devices.

Also for the purposes of this paper, a magazine, either print or digital, is being defined as something that has a clear beginning, middle and an end. It is a structure that contains curated content, which has been through an editorial review, and has an enhanced aesthetic treatment applied. They are date stamped, and are issued on a weekly, monthly, or quarterly basis (Santos Silva, 2011). Reader focused websites hosted and produced by a magazine are generally not considered digital editions, as they lack the same structure.

1.2 Canadian magazine market overview

The magazine market can broadly be separated into three main categories: consumer, business-to-business (B2B, or trade), and custom publishing. Consumer magazines target the general reading public, appealing to special interest groups, or niche markets. These publications are often obtained through paid newsstand purchases or subscriptions.

Trade magazines target professionals, and provide industry-specific topics. Custom publishing titles are generally brand magazines, also known as content marketing, which contain editorials that indirectly introduce a product or service to the reader.

The Canadian magazine industry total revenues in 2017 were CND\$ 2 billion, and have experienced an annual negative growth of 5 % since 2012 (Ibisworld, 2017). In general, Canadian print magazine circulations have been in decline, however the overall industry is expected to fare better than both the global and North American markets. The Canadian market is predicted to grow at a compound annual growth rate (CAGR) of 1.2 % through 2016–2021 (PwC, 2017). It is anticipated that digital advertising will provide the growth for consumer magazines.

In Canada, consumer magazine issue sales are driven primarily by subscriptions, which represent 88 % of the copies sold (FIPP, 2014). The majority of a Canadian consumer magazine’s revenue, however, comes through advertising and other print related products; subscription and newsstand sales combined represent an average total of 26 % of revenue.

Typically, a magazine is focused on one specific or broad topic, for example, fashion, gardening, or automobiles. However there can be many different titles produced by one publishing company; leading publishers in Canada include TVA (groupe TVA.ca/legroupe/publications), Rogers Media Publishing (www.rogersmedia.com), and St Joseph Communications (stjoseph.com).

The focus of this research project is on consumer publications, because of their wider audience, and their relative importance to media and culture. The initial objective was to identify which different platforms consumer publishers in Canada currently use for digital distribution – whether Canadian publishers are focusing on devices and approaches that have the greatest potential to reach audiences.

One concern is the wide variety of devices available, with different operating systems, screen sizes and aspect ratios, creating a barrier for publishers “seeking a broader distribution footprint” (Guenther, 2011). As well, there has been discussion in the publishing industries about specific digital formats, and whether to invest in downloadable native apps (Tomas, 2013).

This investigation of the current state of magazine digital platforms is useful to help identify and benchmark trends, which could provide valuable insights for publishers considering a shift in their platform strategy.

2. Methods

2.1 Content analysis

A content analysis is an established technique used to systematically investigate a particular type of communication (Macnamara, 2005). When applied to mass media, it provides a useful methodology to categorize and summarize both content and format (Neuendorf, 2002). It is applicable for this research project, as it provides a suitable framework to review magazine print and digital editions.

For the purposes of this analysis, content relates to the magazines overall editorial category or theme (for example, lifestyle, or business). Format relates to identifying the different digital edition types and platforms supported, as well as the affordances and engagement tactics used.

Affordances are defined here as ‘possible actions available in the environment’ (digital issue) to an individual, independent of the individual’s ability to recognize this as a possibility offered to him or her as a reader (McGrenere and Ho, 2000; Miric, 2015). These affordances include features to ‘extend’ the use of content: search, learn more, save, as well as links to additional content. They also include additional multimedia to ‘enhance’ content – images, video and audio. This content analysis also investigates different digital engagement tools that publishers use to build relationships with their audiences; social media, as well as other techniques such as newsletters, archives, content updates, comment sections, and email.

2.2 Applied methodology

There are approximately 975 English language consumer magazine titles published in Canada (Magazines Canada, 2015), covering a wide range of themes, and of varying circulation levels. An in-depth analysis of each title was impractical due to the volume of titles and options.

To select which titles to analyse, 19 leading consumer editorial categories were identified; the selection within each of them was then based on published circulation data (copies sold or distributed). This data was obtained through a variety of sources; the Canadian Advertising Rates and Data (CARD) online portal for media buyers, published data from the International Federation of the Periodical Press (FIPP, 2014), or from a publisher's claim available in their media and advertising rate cards. Preference was given to CARD and then FIPP, when possible, as these circulation numbers are audited by third parties, and therefore more reliable.

From each editorial category, sample titles were then selected representing lower, moderate, and higher print issue circulation rates. This was done in an effort to capture information from a variety of differently 'sized' magazines (not every editorial category had titles in each circulation tier). Lower circulation is defined as 1 to 99 999; moderate circulation is defined as 100 000 to 499 999; higher circulation is defined as 500 000 to 1 million plus (Magazines Canada, 2015).

When more than one title option was available, the criteria was to have as many different publishers included in the research as possible. This was done in an effort to analyse a range of different publishing organization's digital strategies as wide as practical. A total of 35 titles were selected, representing 26 different Canadian publishers. Please see Appendix for a list of editorial categories, publishers, their titles, and their respective circulation numbers (Smyth and Fan, 2017).

From this sample set, a media content analysis was conducted. The availability of different formats of digital editions, platforms and device support were documented. This was accomplished through first identifying consumer-focused websites related to each title, and reviewing these for the availability of 'digital issues'. The different platforms, types of devices (tablet or mobile), and operating systems (Apple iOS or Google Android) available were noted.

Next, the edition format of these digital issues were classified according to accepted industry definitions, as either a 'digital replica', an 'extended PDF', or as a 'native app' edition (Idealliance, 2013). A digital replica is an electronic version of the print edition, usually

derived from the Adobe Portable Document Format files (PDF) that were created to transfer content for the final production of the print issue. A reader swipes right to left in order to read left to right and pages appear as they would in the print version, downsized to fit the device screen. There are no additional interactive features built into this digital edition type (Nicolas, et al., 2014). Extended PDF editions are based on replica editions, however with some basic interactive elements incorporated for enhanced usability (such as a link to another relevant article).

A native app edition refers to a magazine that is designed and created specifically for a specific type of digital device. It is generally considered as providing a superior user experience, compared to other options. Native apps typically have added features; multimedia content, connectivity through social media channels, as well as additional content when compared to the print issue. As a result, they are generally the most costly to produce (Nordicity, 2009).

Print and digital versions of the same title and issue were obtained for analysis. Print issues were acquired from newsstands when possible, or directly from the publisher. Digital issues were purchased as App Store downloads through Apple's iTunes Canadian store. Print issues were physically compared on a page-by-page basis to the digital edition, using Apple iPad tablets. The relative number and type of 'extend' and 'enhance' affordances in the native app digital editions were identified, and catalogued for both editorial and advertising content. The type and availability of the audience engagement tools utilized by the title were also identified and catalogued.

Advertisements were identified using accepted industry standard classifications for digital editions (Idealliance, 2013): Straight from Print (SFP) ads are repurposed directly from the referenced print version, and can include a single link to an external website. Designed for Tablet (DFT) ads have been designed to fit devices – users do not need to tap and zoom to read content. These can also include multiple external links. Enhanced for Tablet (EFT) ads are also designed for tablets, however also include multimedia such as animations, slideshows, video, or audio, as well as multiple external links.

The data and findings were catalogued in a master spreadsheet, according to editorial category, publisher, and title. The availability of specific issue formats, affordances, and engagement tactics were recorded in separate worksheets. The results were tabulated using Boolean pair yes/no entries. Total positive and negative responses were determined, with ratios and proportions calculated as required.

Previous research related to these topics investigated North American magazine titles available through a particular distribution platform, and found no direct link between affordances and digital edition circulation levels (Miric and Lumby, 2015). Their work analysed Next Issue (now known as Texture), which is magazine digital edition subscription service. This content platform operates with a model similar to Netflix for video, or Spotify for music, customers pay for unlimited access to magazines that publishers make available through the service.

The objectives of this research differ in that it is focused specifically on Canadian magazines, and the leading commercial editorial categories (as measured by number of titles and circulation numbers). It investigates the collection of different platforms and edition types offered by these publishers, as well as the affordances available. In addition, it seeks to separately quantify the use of different audience engagement tactics, used by publishers in an effort to build their digital communities.

These results are then analysed using the magazines' available digital and print edition circulation rates. A ratio of Digital to Print circulation (DtpP) is used to better compare and contrast results between titles, and across circulation tiers.

3. Results

3.1 Website availability

To start, it was determined if the magazines published a website for their reading audience (not purely a business to business site to support advertising sales). Readers could use a magazine's site to discover the availability of any digital issues. Figure 1 shows this ratio.

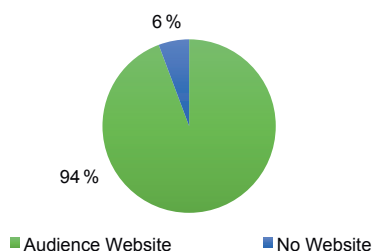


Figure 1: 33 of the 35 magazines researched published a reader focused website

3.2 Digital editions and formats

Secondly, all of the magazines were checked if they offered digital editions. The majority of the magazines analyzed offered some version of a digital issue based on their print issues – 86 % (30 of 35 titles).

Of the titles offering digital editions, 73 % offer a native app version, with 67 % offering a replica edition. The extended PDF edition is least popular, at 47 %. Many publishers opt to offer digital editions in more than one format, offering a native app version, but also a replica (often delivered through a third party digital newsstand platform such as Magzter, Texture, or Zinio). Figure 2 shows this breakdown.

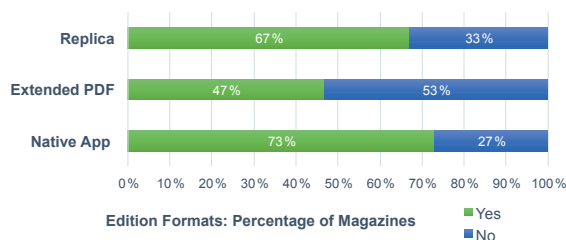


Figure 2: Different formats of digital editions of the 30 titles offering digital editions

Note that 63 % of the magazines offer multiple formats for their digital editions – 19 titles offer more than one digital format, 10 offer only a replica edition, and 1 provides only an extended PDF. No title limits their digital publishing to a single native app digital edition.

3.3 Native app platforms

As shown in Figure 3, the majority of the 22 titles offering a native app edition support both tablet and mobile (smartphone) devices, however 9 % (2 titles) publish for tablets only.

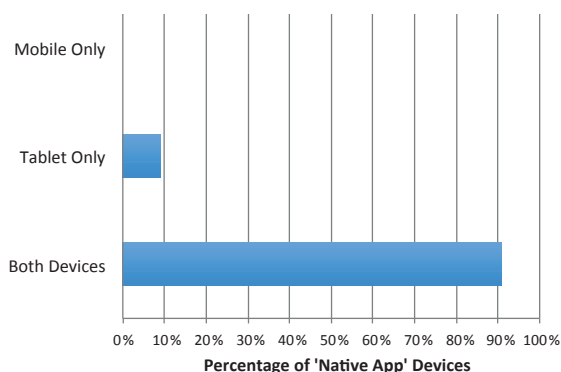


Figure 3: Device support for native app editions

3.3.1 Tablet operating systems

Android and iOS are the two primary operating systems for tablets. Apple's iOS is used primarily in the devices the company produces (iPad and iPhone), while Google's Android operating system is used in tablets and smartphones from a variety of manufacturers (Huawei, LG, Samsung, and others). In the North American market, Apple has the majority of the tablet market share, with over 65 % of tablets running iOS

(Statista, 2018). Publishers appear to understand this; 100 % of the titles offer native apps for iOS enabled tablets. Almost 75 % of titles support both iOS and Android, however no publisher produces titles exclusively for Android OS based tablets.

3.3.2 Mobile operating systems

In Canada, the leading operating system for mobile is Apple’s iOS, with 53.99 % of the market, followed by Android with 44.92 % (Statcounter, 2018).

As with tablets, 100 % of the titles with mobile native apps support the iOS, with 75 % supporting iOS as well as Android – no title publishes exclusively for Android devices.

Understanding the significant market share for Android, publishers may wish to consider a shift to supporting both platforms, with a specific focus on mobile.

3.4 Affordances

From the set of magazines offering both print and native app editions (22 titles), a specific print issue was compared with its digital counterpart, to examine a variety of affordances. These have been sorted into two groups, those that ‘extend’ the reader’s use of the content and those that ‘enhance’ the content. These are considered for two content subcategories – editorial and advertising.

3.4.1 Editorial ‘extend’ affordances

For the purposes of this research project, the functions that allow a user to increase their use of the editorial content are grouped together as affordances that ‘extend’ the reader’s use of the content, designed to make it easier to navigate through the content. These include search, url links to additional content, learn more, and save article functions. Figure 4 shows the levels of ‘extend’ affordances found.

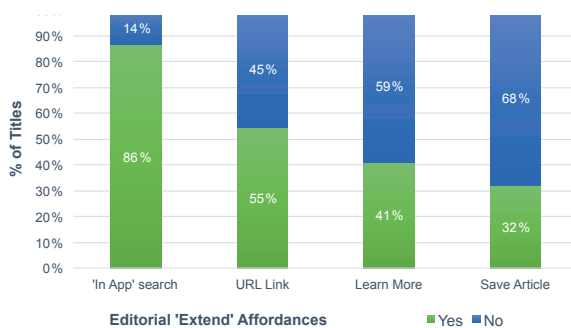


Figure 4: Native app editorial ‘extend’ content interactivity

The ability to search within the native app benefits readers looking for specific topics or keyword phrases within an issue. This feature is important to support a continuing trend in digital publishing – presenting organized and searchable content (Martin, 2017).

The majority of titles offer ‘in app’ search. Note that the device operating systems generally offer some level of manual search functions, outside of the magazine’s application.

Additional links to other stories and content were the most common interactive element, used in 55 % of native app issues. Options for readers to interact with the content, to learn more or to save the article for future reference, were also popular, used in approx. 40 % and 30 % of the issues, respectively.

3.4.2 Editorial ‘enhance’ affordances

Multimedia that supports editorial content are organized as ‘enhance’ affordances for this research. This includes image slideshows, video, and audio content types. Figure 5 shows the rates of ‘enhance’ affordances.

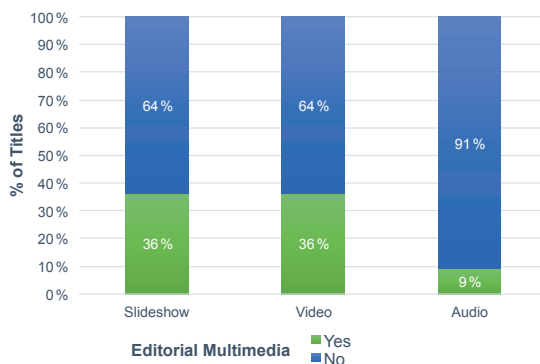


Figure 5: Native app editorial multimedia content

For enhanced content, just over one third of issues offered additional editorial images (for example, through a slideshow) or video. Stand alone audio files were least popular, with 9 % offering recordings of interviews, or similar content.

3.4.3 Advertising ‘enhance’ affordances

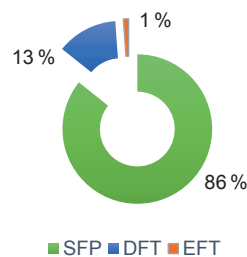


Figure 6: Advertisement formats in digital editions

A total of 540 full page and half page ads were analyzed from the 22 native app issues, with 1 % being identified as EFT, meaning they included interactive features beyond links to additional content, and 13 % were identified as being DFT, meaning the layout and content fit the screen of the device. Figure 6 shows this breakdown.

Examples of the interactive features found included video tutorials for applying beauty products, as well as multiple links to external social media sites. In some cases the EFT ads took a measurable amount of time to load (more than four seconds), or caused the application to freeze.

3.5 Digital audience engagement tactics

Some print based consumer magazine publishers in today’s marketplace are making efforts to build digital communities, to increase engagement with their audiences outside of their regular editions.

3.5.1 Social media accounts

Publishers are looking to extend their brand awareness through a larger digital presence. One approach for this is through directly contributing to a variety of social media communities (MacArthur, 2018). Figure 7 shows the breakdown of channels.

Of the 35 titles checked, 32 had a social media presence, defined here as an account on an established social platform (91 %). Two of the 35 titles had neither a website or social media presence that could readily be discovered (Award and Westworld). One title, Kayak, had an online presence, however no social media presence.

Of the different social media platforms publishers leveraged, Facebook and Twitter are the clear leaders. The pattern for Facebook and Twitter is similar to

overall social media usage trends. According to industry reports (U.S. results, November 2016), Facebook is the number one social site, followed by YouTube and Twitter, with Reddit, Pinterest and Instagram trailing (Statista, 2016).

All of the titles with a social media presence are active on more than one social channel, and all these titles have accounts on both Facebook and Twitter. The next most common combinations include either Instagram or Pinterest, with 84 % of the titles having accounts on all four channels.

Other social channels are utilized to a lesser extent, perhaps according to editorial theme. For example YouTube is used for interviews (Maclean’s) or for how to tutorials and reviews (Motorcycle Mojo).

3.5.2 Social media sharing

Providing readers with the option(s) to easily share content they have read in a particular issue of a magazine is considered another valuable approach to building overall awareness of a magazine’s brand and content (Bilton, 2016).

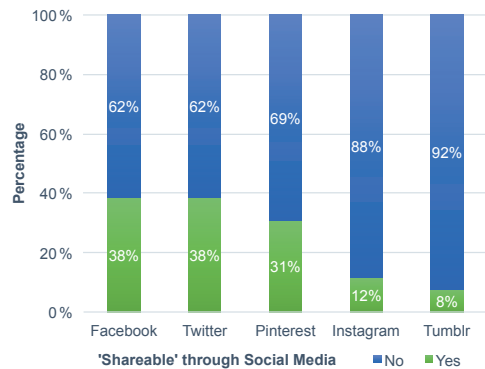


Figure 8: Magazine support for social media sharing

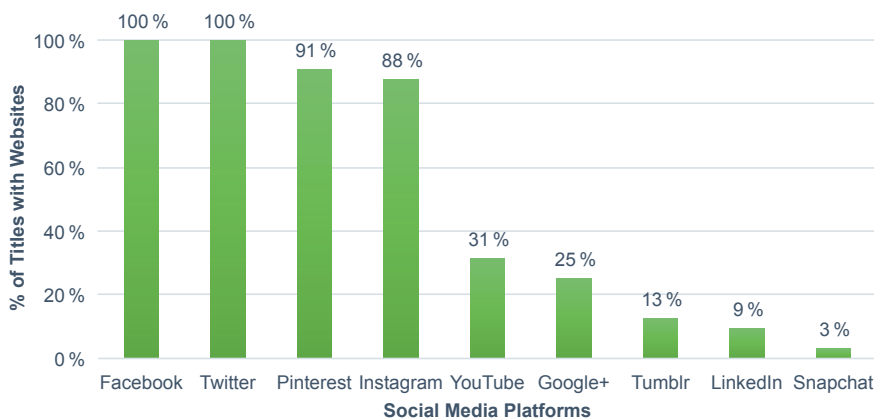


Figure 7: Social media platforms share of magazine brand accounts

Figure 8 shows the top four social media channels that publishers support for their readers to share content on are the same as the top channels leveraged for their own social media presence. However, the overall number of titles supporting shareability is markedly lower.

3.5.3 Additional engagement approaches

An additional approach publishers use to help build and maintain audience engagement is through digital newsletters, delivered via email between regular issues (Moses, 2017). Magazines were reviewed for a ‘subscribe to newsletter option’ through two channels, their magazine website as well as through their native app digital issues.

Figure 9 shows the majority of titles (70 %) with websites presented viewers with the opportunity to sign up for a digital newsletter.

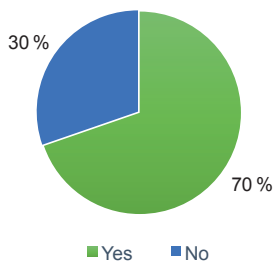


Figure 9: Magazine websites: newsletter subscription option

The native app digital editions were also checked for newsletter options, usually offered as an interactive feature that encourages readers to sign up for a newsletter. Known as ‘overlays’ or ‘modals’, these elements appear as a box or window overtop of the content, and contain a ‘call to action’ for the reader to subscribe to the magazine’s newsletter. Figure 10 shows the number of native app editions offering newsletters.

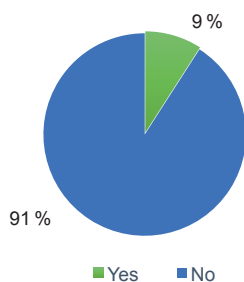


Figure 10: Magazine native app editions: newsletter subscription option

Considering the native app magazines, 2 titles (9 %) appeared to be using interactive elements in an effort to build their newsletter subscriber list. This lower

number compared to the website may be a conscious effort on the part of the publishers not to distract their readers from the experience of reading the digital issue.

Another engagement tool publisher’s leverage for their audience is access to a catalog, or archive, of non-current issues. Figure 11 shows a combined 91 % of titles offer some level of digital access to back copies of their issues, while 9 % of magazines do not offer any kind of access to their archive.

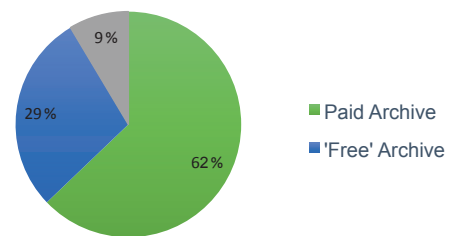


Figure 11: 91 % of magazines offer access to past issues

Access to archived copies can be considered both an engagement approach, and a monetization tactic, offering readers further access to paid content. The value to publishers offering unpaid archived content to readers is, in part, from requesting readers data – their name and contact information – which can be used to help encourage future subscriptions (Spencer, 2007).

Content updates are the ability for a native app to receive new editorial content outside of regularly published issues. They are used in an effort to keep readers coming back to a digital edition between editions. Of the 22 titles with native apps, 2 titles (9 %) supported content updates outside of regular publishing cycles. The two titles, Maclean’s, a business magazine, and Flare, a fashion title, are both owned by Rogers Media Publishing, which could suggest an overall corporate strategy.

In the past, a comments section was seen as valuable tool to build media companies engagement with readers. An in-app comments section supports the ability for a reader to post questions, thoughts, and interact directly with the magazine and contributors through the native app. This was available in just one of the digital editions, Chatelaine.

This could be the result of challenges surrounding the technology to support this within native apps, however several media outlets have also closed or restructured their comments sections in recent years (The Toronto Star, CBC, CNN). This was due in part to the increased use of social media for conversations (Finley, 2015), as well as to the questionable merit of some of the content (Valenti, 2015).

Finally, the ability for readers to email the magazine directly in the app (for example, ‘letters to the editor’) was supported in 21 of the 22 title’s (95 %) native app digital editions.

4. Discussion

A consumer magazine’s economic success is, in large part, contingent on circulation – a measure of how many copies of an issue are sold and/or viewed, calculated over a period of several consecutive editions. The cost for advertising space is generally tied to the level of circulation.

Verified circulation reports (audited readership numbers), are available from a variety of different companies that specialize in audience measurement for media buyers. Sources and vendors vary depending on region and market strategy; Vividata in Canada, or the Alliance for Audited Media in the U.S.

Measurement companies, and magazine industry organizations such as Magazine’s Canada and The Association of Magazine Media (MPA), advocate for reports that capture and communicate a title’s complete audience across multiple channels (for example, PC/laptop, mobile web, video) for media buyers, such as the MPA’s Magazine Media 360°.

4.1 Digital and print circulation

Many audience reports do not break out digital edition circulation separately from print based editions. Figure 12 shows that of the 33 titles in this research that are publishing digital editions, 14 reported separate circulation numbers for their digital issues.

The reported circulation numbers for the digital editions are relatively lower compared to print circulation. A ratio comparing a title’s Digital to Print circulation (DtoP) is used here to better contrast results between titles, and across circulation tiers.

Of the 14 titles listed in this set, 13 offer a native app edition, the remaining one, Windsor Body Magazine, offers only replica version. It is also the only one of the set that does not publish audited circulation reports, meaning its publisher claims are unverified. As a result of both of these, it is considered an outlier, and is therefore not included in the following calculations and discussions.

The median DtoP ratio of the remaining 13 titles is 11.87, while the mean is 17.24. Four of the six titles with DtoP ratios above the median are published by the same parent company, Rogers Media Publishing (Chatelaine, Hello Canada, Maclean’s, and Today’s Parent). This could indicate an overall corporate strategy emphasizing digital readership. Note, however, that Canadian Business and Flare are also published by Rogers, and have relatively lower digital edition circulation ratios of 7.08 % and 11.87 %, respectively.

4.2 Circulation and affordances

The group of seven titles publishing native app editions below or at the DtoP median had a slightly higher average number of ‘extend’ affordances per issue than those above the median (average of 2.0 per issue compared to 1.67). However, with regards to ‘enhance’ affordances, titles above the DtoP median had an average of 2.0 examples per issue, while titles below had an average of 0.71 examples per issue. Offering the ability to extend the use of content through links and saving

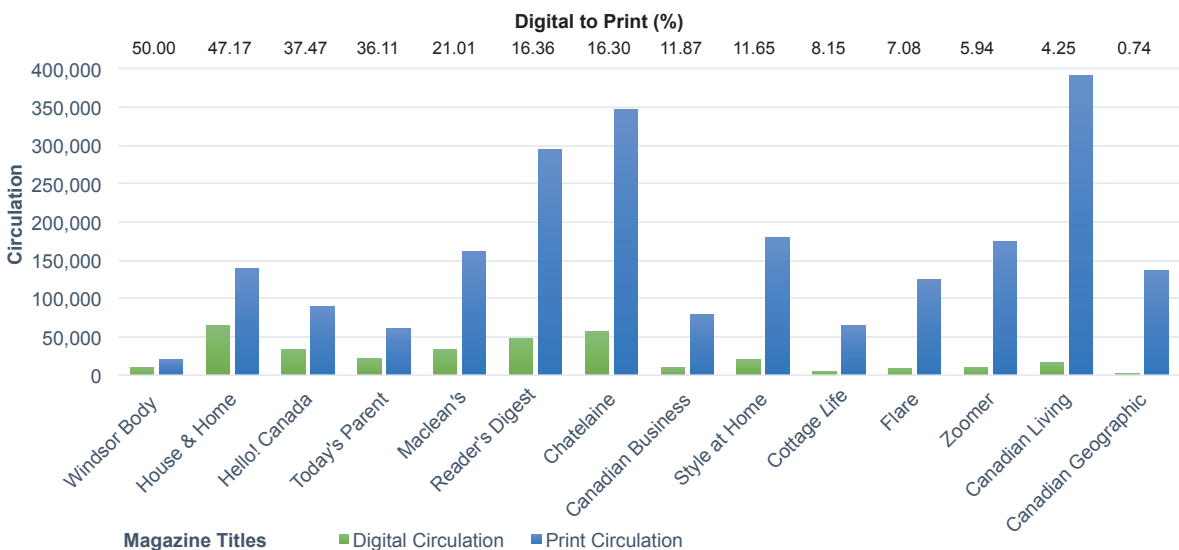


Figure 12: Canadian Magazines: digital to print circulation ratios

articles did not correlate well with a larger percentage of digital edition sales, while offering multimedia content to readers did.

A publication's strategy for offering content extensions and enhancements may be led by their theme or category – business titles are presumably read for professional reasons and not necessarily for entertainment or leisure; Canadian Business had a high level of technical support for sharing articles, but offered no multimedia content. House & Home also offered full support for sharing articles, however they also utilized each type of multimedia content as well. Perhaps the publisher understands that a home interest category reader may wish to share articles and images for inspiration, and extend their reading through different multimedia content formats.

Higher ratios of DFT or EFT advertisements do not appear to have a strong direct relationship with higher digital circulation ratios.

The seven titles below the median DtoP had an average number of DFT and EFT advertisements per issue of 2.86 and 0.43, respectively, while the six titles above the median DtoP had an average per issue of 3.0 and 0.5.

Given the very low numbers of DFT and EFT ads found in the sample set, small differences have a measurable impact. For example, from the subset above the median, the digital issue of Today's Parent had 11 DFT ads, while Reader's Digest, Maclean's, and Hello! Canada each had none. Without the DFT ad count from Today's Parent, the titles above the median would have a lower average of DFT ads than the subset below the median.

4.3 Circulation and social engagement

Online traffic from a magazine's social media accounts is often treated separately from audience measurement perspective, perhaps reflecting the difficulty publishers have monetizing engagement on social media.

For a magazine brand, social audience numbers (likes, retweets, or shares) do not necessarily translate directly to issue sales, and as a result don't necessarily provide an increase (lift) in response for advertisers. Editors are addressing this by partnering with established social media influencers, to help promote their titles (Milne, 2018).

Each of the 13 titles with reported digital circulation numbers had a presence on a variety of different social medial channels. The number of different channels the title was active on did not appear to have a direct relationship with their DtoP ratio. The average for the 13 titles was 5.08 channels per title; Canadian

Geographic was active on 7 channels, with a DtoP of 0.74 %, House & Home was active on one channel less, but had a DtoP of 47.17. The average for the 7 titles at or below the median DtoP was 5.14 channels per title, slightly higher than the 5.0 channels average for the titles above the median.

It is interesting to note, however, that increased ability for a reader to share content through a personal social media account did have some relationship with higher DtoP circulation ratios. The average for the 13 titles was 1.54 channels per title; the average for the 7 titles at or below the median DtoP was 1.0 channel per title. The average for the 6 titles above the median was higher at 2.17 channels per title.

It would be understandable that a title's social media strategy would follow the demographics of their target audience – titles that appeal to groups who are active social media users would perhaps be expected to be more active themselves.

4.3.1 Circulation and additional engagement approaches

Newsletters are used in an effort to keep readers involved with the brand between regular issues, as well as for additional advertising sales opportunities. Almost 2/3 (65.7 %) of the complete set of 35 titles analysed here also published digital newsletters. Of the titles publishing native app digital editions, 77 % also produced newsletters. All of the 13 titles reporting audited digital circulation numbers published a newsletter.

As for archives, 92 % (28/30) of the titles publishing any format of a digital edition offered access to their archive of past issues. Two thirds of these require paid access; the remainder offered free access, usually requiring a basic contact information form to be completed.

All of the 13 titles that publish audited digital edition circulation results offered digital archives of past issues. Of these, 12 required payment for access (usually included with subscriptions), while one offered free access to their back issues.

Other engagement approaches either had too few examples, or were universal in the set. Two titles offered content updates through a native app, outside of a regular issue – a business title Maclean's, with a DtoP above the median, and a fashion magazine, Flare, which was below the median. One title offered a comments section, a woman's magazine Chatelaine, which had a DtoP above the median. All of the titles in the sample set offered an in-app email alternative.

5. Conclusions

Print based publishing companies continue to work through a period of ‘creative destruction’, competing with other medias for attention, as well as against titles started by publishers that may have been quicker to adapt to newer digital technologies.

This content analysis determined that the majority of leading print-based Canadian consumer magazines offered digital editions of their issues (86 % of the titles investigated). These editions are available in a variety of formats, with 73 % of publishers supporting digital issues producing a native app version. As well, publishers also offered either a digital replica (41 %), or extended PDF (47 %) version, with 18 % offering all three versions. Publishers appear to be exploring multiple formats for extended reach; it is relatively economical to create a replica version for distribution through a newsstand platform such as Texture, or Zinio.

From a platform perspective, it was determined that Canadian publishers appeared to favour tablets slightly over mobile, along with full support for the iOS platform, with partial support for Android. The on-going availability of different devices, screen resolutions and aspect ratios, as well as operating systems, acts as a further set of technical constraints on publishers. Each of these different combinations could require a dedicated native app.

The overall market for tablets in Canada has stabilized, with some reports predicting a decrease in sales. In contrast, the mobile market is expected to continue to grow through 2020, with Apple’s iOS continuing to have the largest market share (Rody-Mantha, 2017).

There are also recent reports highlighting the overall growing importance of mobile as a platform for digital media consumption. In her latest annual Internet Trends report, respected Industry Analyst Mary Meeker outlined that while device sales are slowing due to market penetration, mobile’s actual share of time spent online is increasing (Meeker, 2018). On mobile, Internet browser usage is increasing, while individual app usage is generally decreasing; however media subscription apps are “predicted to grow 20 %” in Canada through 2020 (Rody-Mantha, 2018). Eric Schmidt, former CEO and executive chair of Google, has previously encouraged publishers and advertisers to adopt a “mobile first” strategy, citing that mobile will be a key driver for the digital display advertising market (O’Regan, 2011 cited in Tomas, 2013).

Overall, the native app editions studied generally presented relatively moderate to low use of the digital

affordances available, aside from in-app search that was found in 86 % of the issues. The other interactive elements related to ‘extending’ content use were links (55 %), learn more (41 %) and save article (32 %). The multimedia formats used to ‘enhance’ content were generally less common, with interactive images and video found in 36 % of native app issues, and audio in 9 %. While there did not appear to be a direct relationship between higher rates of digital circulation and ‘extend’ affordances, there did appear to be relationships between higher rates of ‘enhance’ affordances and higher rates of digital circulation.

In the native app editions, publishers do not appear to be taking full advantage of the affordances available to them to enhance their content. The relatively lower levels of interactive editorial content are presumably related to the constraints of higher costs required to produce this material, as well as the resources to deliver it across multiple devices and platforms (Guenther, 2011).

Overall, the use of interactivity in advertising content is minimal, again presumably related to the resources required to produce the content, as well as demonstrable efficacy for the advertiser (lower circulation levels for digital editions of print based magazines).

With regards to digital engagement with the magazine’s audience, there did not appear to be a direct relationship between the numbers of social media channels a title was active on and digital circulation rates. There did, however, appear to be a relationship between increased abilities for a magazine’s readers to share some level of content through their personal social media accounts and higher circulation rates.

Publishers may wish to (re)consider their strategies for supporting some form of content sharing on social media. It is understood that sharing could be a constraint for publishers of paid content, with some readers effectively republishing copyright protected content through social media sites. Overall, it appears that the publishing industry may still have yet to develop a viable business model to sustain the costs of producing a digital magazine, which appears to continue to contribute to publishers earlier reported overall “poor exploitation of digital tools” (Santos Silva, 2011).

The growth for the consumer magazine market in Canada is expected to depend on digitally delivered titles. Considering the patterns discussed here Canadian publishers who wish to grow their digital audience should further consider a shift in platform focus to mobile devices, with additional operating systems, as well as additional resources for multimedia affordances and digital engagement.

6. Future research

An area of further study could include evaluating the use of social networks by magazines to allow readers to easily share some form of access to a magazine's content. Providing content to mobile devices, via a website, may provide greater potential readership network effects than on a tablet. This work could also include the various technologies that support these deep links into an issue. In addition, this could be considered with an analysis of the use of different forms

of paywalls (access to website content restricted to subscribers), which is reportedly increasing with newspapers (FIPP, 2018). This could include a review of the availability of 'micropayments' in magazine publishing, a monetization approach in which readers can purchase access to specific articles.

Lastly, a similar analysis of competitive titles and categories in the United States publishing market could serve an additional useful benchmark, to evaluate strategies in a similar market.

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Appendix

A list of Magazine Categories, Publishers, Titles, and their Circulation, with sources.

Note: Digital Edition Circulation where available – not all titles reported circulation numbers for their digital editions.

Category	Publisher	Title	Circulation		
			Print	Digital	Source*
Architecture / Design	Canada Wide Media	Award	10,000		Publisher's claim
Automotive	Performance Publications Media Group	PRN Ignition	250,430		FIPP
Automotive	Riptide Resources Inc.	Motorcycle Mojo	11,705		CARD
Beauty	St. Joseph Media	Glow	370,000		CARD
Business	Rogers	Maclean's	161,183	33,870	CARD
Business	Business Edge News Media	Business Edge	157,200		Publisher's claim
Business	Rogers	Canadian Business	79,705	9,460	CARD
Children	Bayard	ChickaDEE	58,643		CARD
Children	Bayard	Chirp	55,277		CARD
Children	Bayard	Owl	47,427		CARD
Children	Canada's History Society	Kayak	6,088		CARD
Family	Family Communications	Parents Canada	50,000		Publisher's claim
Family/Parenting	Rogers	Today's Parent	60,760	21,939	CARD
Fashion	Rogers	Flare	125,111	8,852	CARD
Fitness	Impact Productions	Impact Magazine	90,000		Publisher's claim
Fitness	Myndlogic Publishing	Windsor Body Magazines	20,000	10,000	CARD
Food & Drink	Liquor Control Board of Ontario	Food & Drink	531,333		CARD
Gen. Interest	Reader's Digest	Reader's Digest	294,697	48,211	CARD
Gen. Interest	Canadian Geographic	Canadian Geographic	137,071	1,012	CARD
Gen. Interest	Moongate Publishing Inc.	Harrowsmith's (Almanac)	91,000		FIPP
Health	Alive Publishing Group	Alive	172,661		CARD
Health	The Town Crier of Markham Inc.	Healthy Living	140,000		Publisher's claim
Home Interest	TVA Group	Style at Home	180,430	21,015	CARD
Home Interest	House & Home Media	Canadian House & Home	138,861	65,496	CARD
Lifestyle	TVA publications (Transcontinental)	Canadian Living	391,539	16,651	CARD
Men's Lifestyle	Contempo Media	Sharp	140,000		CARD
Men's Monthly	Chill Media Inc.	Chill	196,683		Publisher's claim
Other Special interest	Zoomer Media Limited	Zoomer	174,816	10,382	CARD
Other Special interest	Rogers	Hello! Canada	89,173	33,409	CARD
Other Special Interest	Cottage Life Media	Cottage life	65,117	5,307	CARD
Sport	ScoreGolf Canada	SCOREGolf	120,381		CARD
Sport	Solstice Publishing	Ski Canada	28,835		Publisher's claim
Travel	Canada Wide Media	Westworld	1,327,818		FIPP
Wedding	Family Communications	Today's Bride	92,666		CARD
Women's	Rogers	Chatelaine	347,560	56,651	CARD

* CARD: Canadian Advertising Rates and Data card online
FIPP: International Federation of the Periodical Press
Publisher's claim: media kit ratecards for advertising sales

