

# PRINT AND PAPER IN A DIGITAL WORLD

An international survey of consumer preferences, attitudes and trust

Print and Paper  
have a great  
environmental  
story to tell



# PREFACE

In just one minute of every day, there are 2,460,000 pieces of content shared on Facebook, 277,000 tweets sent and 72 hours of new video uploaded.

There's no denying consumers today have access to more information than ever before. In this digital rich society, the place for paper and print is a highly-debated subject.

This survey provides insight into how consumers around the globe view, prefer and trust paper and print, from reading for leisure or gaining information to news or marketing collateral.





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# INTRODUCTION

An international survey of over 10,700 consumers was commissioned by Two Sides and carried out by independent research company Toluna in June 2017. The survey was undertaken in ten countries: Australia, Brazil, France, Germany, Italy, New Zealand, South Africa, Spain, the United Kingdom and the United States.

This report analyses responses from all ten countries, providing a unique insight into consumer preferences, attitudes and trust for print and paper in a digital world.

Overall, findings conclude that consumers trust, enjoy and gain a deeper understanding of information read in print, with signs of digital fatigue and concern for security and privacy evident.

## This report explores:

- Consumer reading preferences and reading frequency for different forms of communication channels
- Consumer trust and understanding in news media channels
- Consumer attitudes towards advertising and marketing communication channels
- Consumer attitudes towards the drive to all digital-based communications

## Glossary of Terms

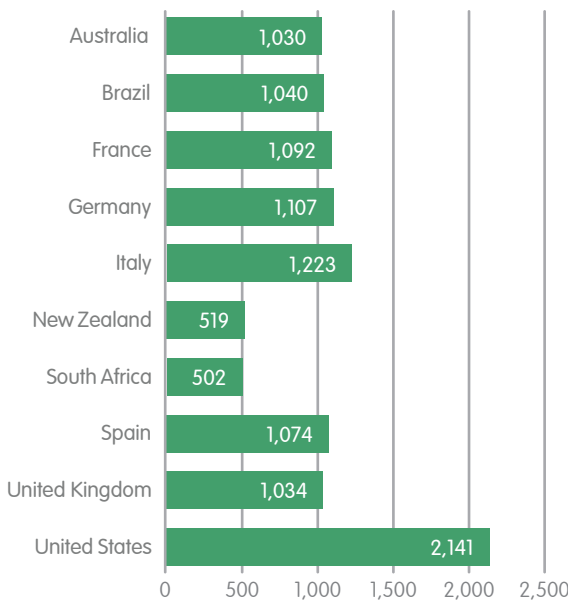
Digital / Electronic devices: this term includes tablets, smartphones, e-readers, laptop or desktop computers.

Agreed(s): this term includes the combined results of respondents who either agreed or strongly agreed.

## About the study

The sample was nationally representative of age and gender to reflect the general adult population of each country.

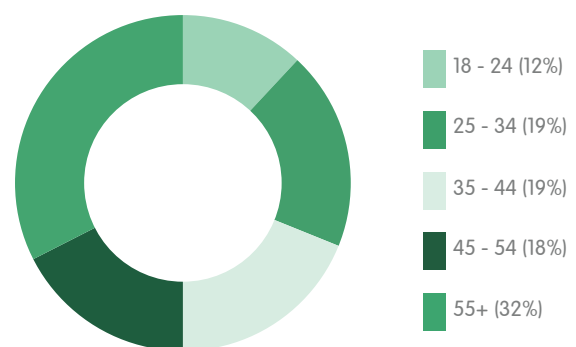
## Sample Size Breakdown



## Global Study Gender Breakdown



## Global Study Age Breakdown



# KEY FINDINGS

## **Many consumers prefer and enjoy reading in print**

The research examines reading preferences for different forms of communications and the results indicate that consumers prefer to read the printed version of books (72%), magazines (72%) and newspapers/news (55%) over digital options. Many respondents also indicated that reading in print is more enjoyable than reading electronically. However, communications from banks, energy, utility and telecommunications providers see an average preference for print of just 33%.

## **Consumers trust print and gain a deeper understanding when reading print**

More consumers believe they gain a deeper understanding of the story when read from print media (65%) over online news sources (49%). In addition, consumers also trust the stories read in printed newspapers (51%) more than stories found on social media (24%). A majority of consumers (76%) also indicated they are concerned about the trend of "fake news".

## **Reading habits vary depending on content**

When questioning reading habits in print or digital, many respondents indicated that the amount of time spent reading a book (45%), magazine (63%) or newspaper (61%) is less now than in the past. However, when consumers are reading magazines or books, they will tend to read the printed versions more regularly (48% magazines, 54% books). When consuming news media, 76% read news on a digital device regularly and 50% plan to read more news online in the future.

## **There is concern about the impacts of digital consumption on health**

52% agreed that they spend too much time on electronic devices and 53% are concerned the overuse of electronic devices could be damaging to their health (eyestrain, sleep deprivation, headaches). A further one third agree they are suffering from "digital overload".

## **Consumers respond to print marketing and advertising messaging**

Advertising and marketing communication preferences were also examined with the results indicating that 52% prefer to read product catalogues in print and on average, 45% of consumers agree that they like receiving personally-addressed advertising mail and printed leaflets delivered to their home, with 46% paying attention to them.

The tendency to consume information from printed leaflets, unaddressed mail as well as direct advertising mail is higher (56%) than marketing emails (49%).

The results indicate 46% would be more likely to take an action after seeing an advertisement in a printed newspaper or magazine than they would if they saw the same ad online.

## **Online marketing and advertising is relatively unpopular with most consumers**

The results reveal that many consumers do not pay attention (68%) to online advertisements and 57% do their best to avoid them. A majority (60%) agreed they can't remember the last time they willingly clicked an online advertisement.

## **Consumers believe that they should have the right to choose how they receive communications**

The final part of the survey examines the drive to digital-only communications. Findings indicate that 89% of consumers believe that they should have the right to choose how they receive communications (printed or electronically), at no extra charge, from financial organisations and service providers.

## **Print provides more privacy and security**

71% of consumers have privacy concerns with personal information being held electronically, with 73% believing that keeping hard copies at home is a safe and more secure way of storing information.



# 1. READING PREFERENCES

Technology and the way we communicate has rapidly developed over the past few decades. As consumers, we now have a whole host of electronic devices to choose from to receive media and information. But with so much choice, does print still have a place? And given the choice, what format do consumers prefer?

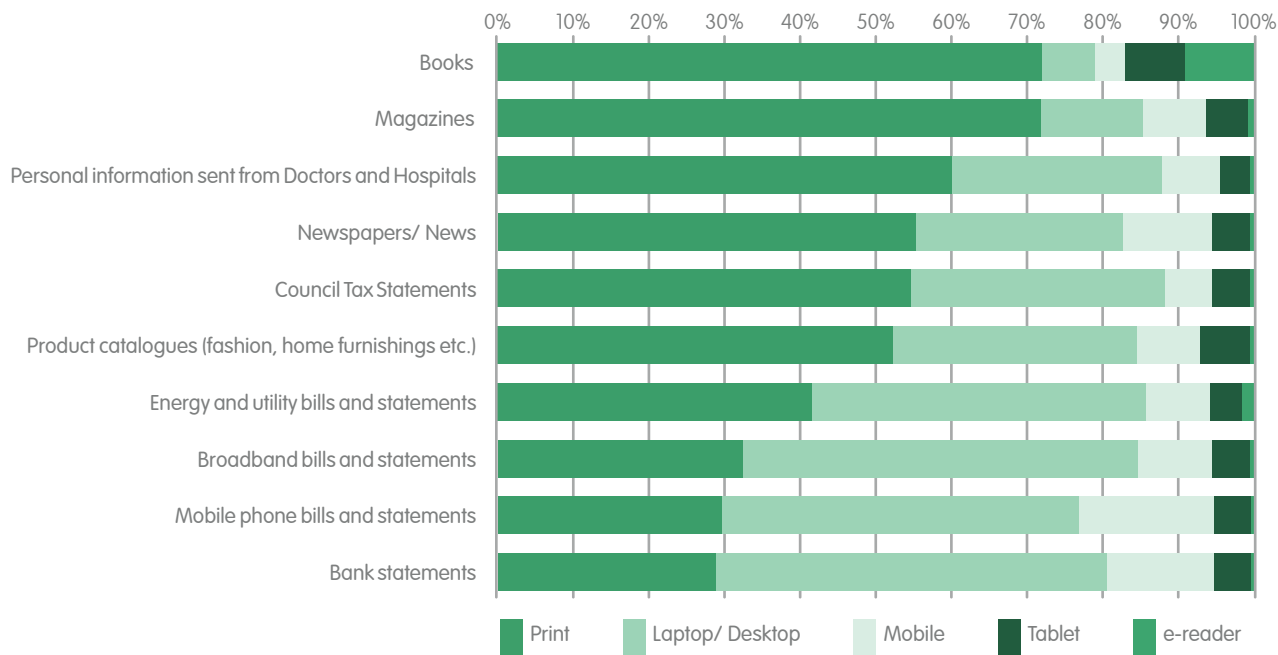
Print still packs a punch for recreational reading – books, magazines, news and catalogue shopping. Computers are preferred for reading transactional documents e.g. bills and statements, while mobiles and tablets were the least popular devices for reading.

Despite the warnings of e-books ousting paperbacks from people’s lives, print remains the most popular format for reading books. 72% of all respondents prefer printed books, and only 9% of respondents prefer e-readers. The survey found that France has the most fans of printed books, with 85% choosing this format.

Printed magazines are just as popular as printed books, with 72% preferring to sit back and relax with a paper copy of their favourite magazine.

There were wide-ranging preferences for reading news around the world. Overall, 55% prefer a printed newspaper, while 27% prefer to read news on their computer and only 17% prefer using a mobile or tablet. In Germany, 75% of consumers still prefer to get their daily news through a printed newspaper; whereas in Spain, only 42% of respondents choose print.

For transactional documents, with the exception of tax statements, computers (laptops and desktops) are the most preferred method of reading.



## Findings at a glance

- France: 85% would rather read a book in print
- UK: 78% prefer printed magazines
- Germany: 75% prefer printed newspapers
- Australia: 63% prefer to shop with printed catalogues
- Brazil: 61% prefer their energy and utility bills in print

## WHO LOVES PRINT THE MOST?\*

Germany	64%
France	56%
Brazil	54%
United Kingdom	52%
Australia	51%
United States	48%
Spain	45%
Italy	43%
New Zealand	43%
South Africa	38%

\*Average score for print across all categories



## 2. READING HABITS

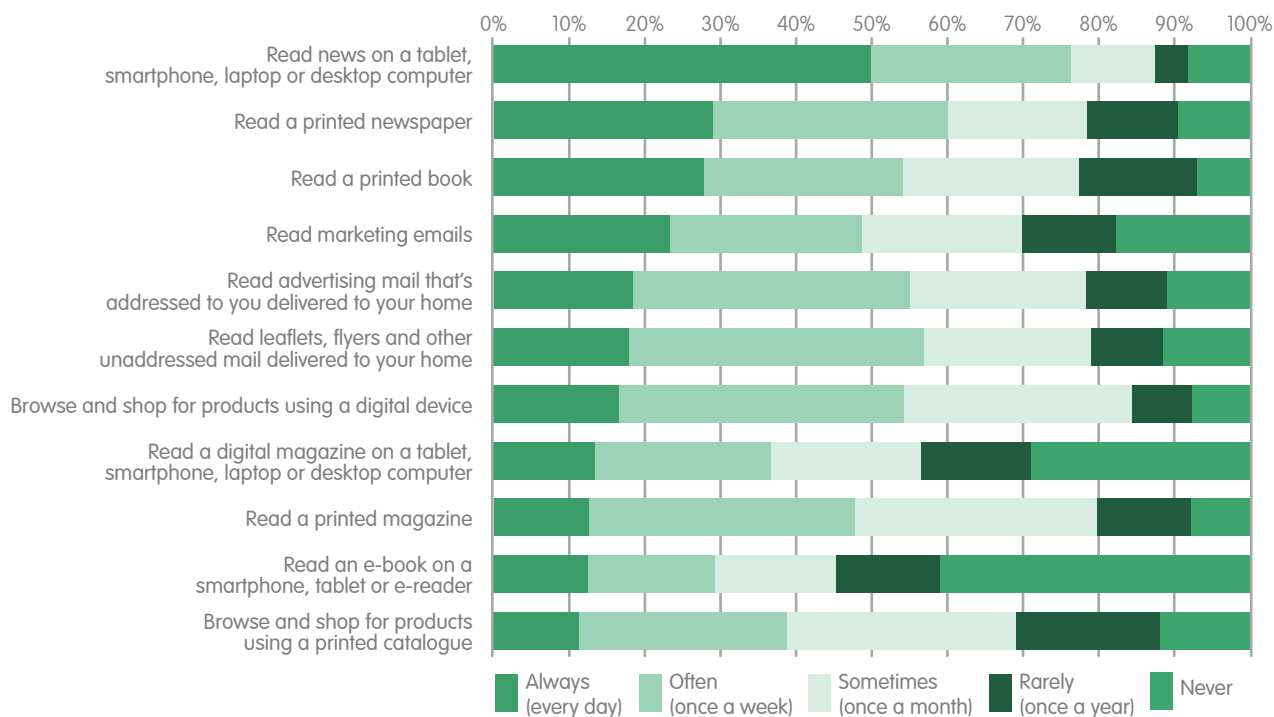
### Many consumers say they prefer print - but does their behaviour reflect this in practice?

Although the preference for news in print is greater than that for digital (55% preferring printed news compared to 45% preferring e-news), in practice, digital is the most widely adopted method of consuming news. 50% of all respondents read news on a digital device daily and a further 26% at least once per week. Printed newspapers are read daily by 29% of global respondents and 31% pick up a newspaper at least once a week.

Printed books are preferred by 72% of consumers and are read daily or at least once a week by 54% of all respondents. Only 28% of global respondents prefer reading books electronically (mobile, tablet, computer and e-readers); this preference is clearly reflected in behaviour, as 55% claim to never or rarely read e-books.

80% of all respondents read a printed magazine at least once a month, compared to 56% reading digital magazines. The survey found some considerable differences in magazine reading habits. For instance, 57% of respondents in Italy read a printed magazine at least once per week, but in both New Zealand and Australia, less than 35% of consumers read a printed magazine every week. In Brazil, 63% claim to read a digital magazine at least once per week, compared to only 19% of UK respondents.

When it comes to reading marketing messages, the results for both electronic and printed formats were similar. 23% of all respondents read marketing emails every day; 19% read addressed advertising mail delivered to their home daily and 18% read unaddressed advertising mail delivered to the home every day. Reading of marketing emails varies dramatically by country. In Brazil, 45% of consumers read marketing emails every day; whereas in the UK, less than 13% of consumers read marketing emails on a daily basis. 35% of respondents in France claim to never read marketing emails at all!



### Findings at a glance

- Germany: 67% read a printed newspaper at least once a week
- U.S.: 63% read addressed advertising mail at least once a week
- Italy: 57% read a printed magazine at least once a week
- Spain: 56% read a printed book at least once a week
- Australia: 54% browse and shop for products using a printed catalogue weekly
- France: 35% never read marketing emails

**60%**  
**READ A PRINTED  
 NEWSPAPER AT  
 LEAST ONCE A  
 WEEK**

# 3. TRUSTED NEWS

The concept of fabricating stories for the purpose of selling more copies has been around since the first days of mass media. However, it is the recent phenomenon of social media that has given rise to “fake news”.

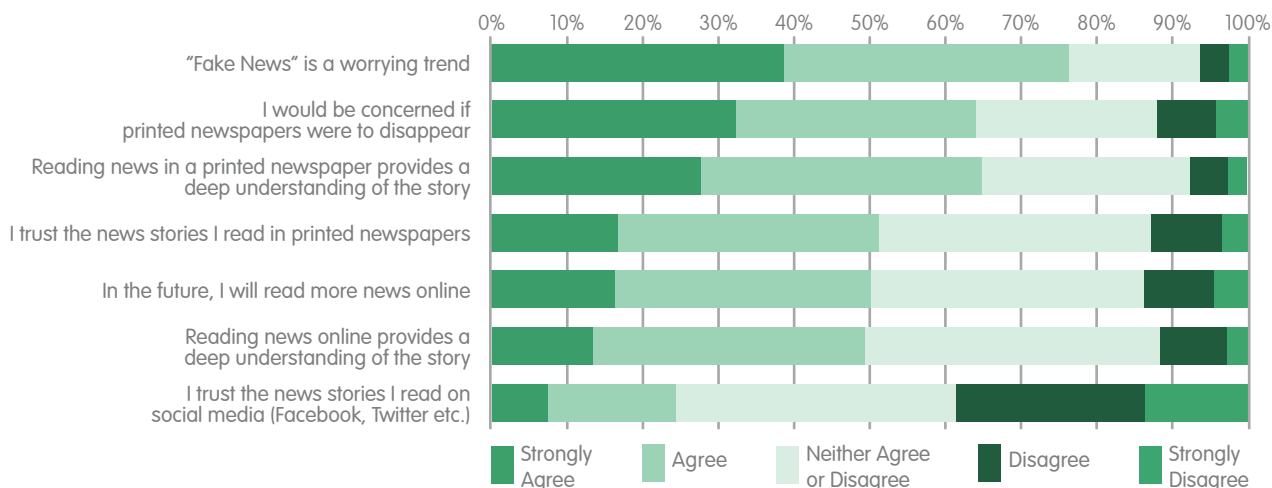
76% of all respondents agree that fake news is a worrying trend. In South Africa, 87% are concerned about the trend.

Consumers across the world have very little trust in social media as a source of news. Just 24% of global respondents trust the news stories they read on platforms such as Facebook and Twitter. Consumers in the UK, New Zealand and South Africa are the most sceptical, with only 16-19% of respondents trusting the news stories they read on social media. Consumers in the United States are the most trusting of social media, with 35% of respondents trusting the stories they read.






Trust in newspapers is twice as high as trust in social media, with 51% of global respondents trusting the news stories they read in printed newspapers. The country with the highest level of trust in printed newspapers is France at 62%. This would likely explain why France also has the highest proportion of respondents (74%) who would be very concerned if printed newspapers were to disappear.

Printed newspapers can provide in-depth coverage of a story with very little of the distractions that are usually associated with online reading, such as intrusive advertisements, social media notifications, pop-ups etc. This may be the reason why 63% of all respondents believe reading news in a printed newspaper provides a deep understanding of the story; 71% of consumers in both the United States and France believe this to be true.

Although only 48% of respondents believe reading news online provides a deep understanding of the story, 50% of all respondents say they will read more news online in the future.



## Findings at a glance

-  South Africa: 87% think fake news is a worrying trend
-  France: 74% would be very concerned if printed newspapers were to disappear
-  U.S.: 71% believe reading news in a printed newspaper provides a deep understanding of the story
-  France: 62% trust the news stories in printed newspapers
-  New Zealand: Only 17% trust the news stories they read on social media

76%

THINK FAKE NEWS IS A WORRYING TREND



# 4. DIGITAL OVERLOAD?

There is an increasing amount of research that suggests the overuse of smartphones, tablets and computers is damaging to health and impacting sleep. But do consumers worry about this? And how important is it to them to “switch off”?

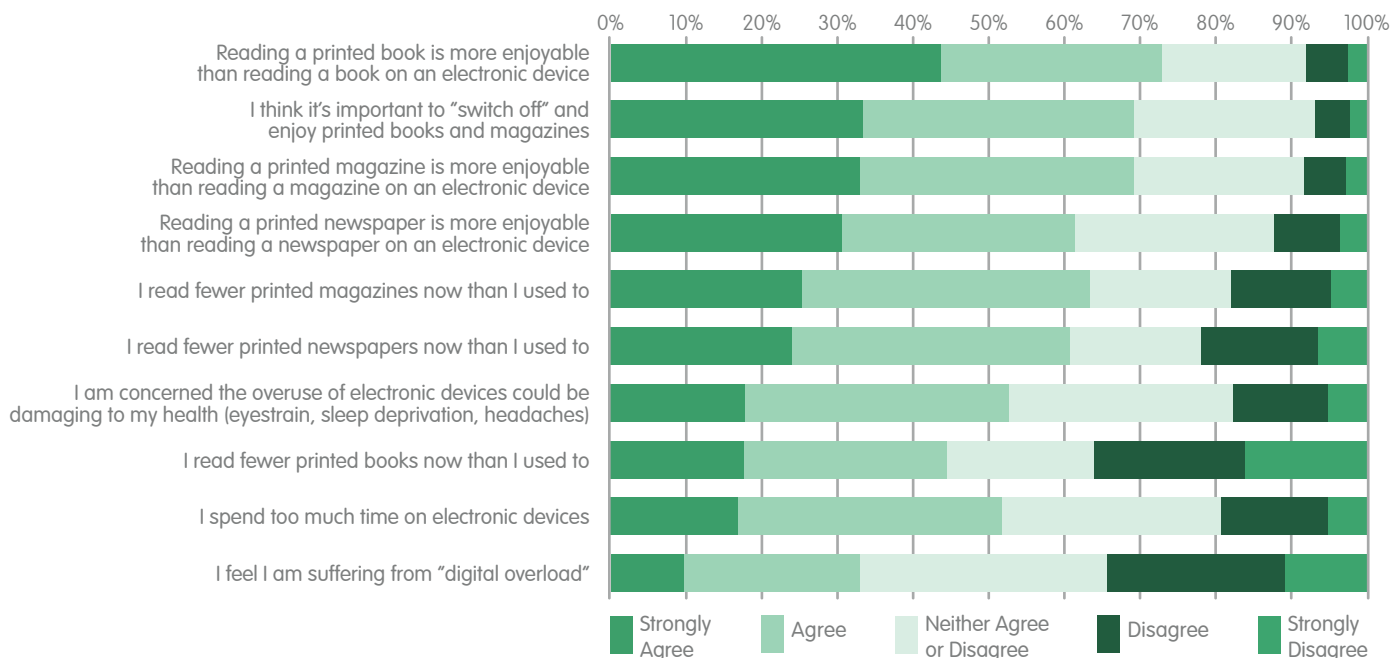
The survey found 53% of global respondents are concerned that the overuse of electronic devices could be damaging to their health. Only 37% of consumers in Germany are concerned about electronic devices damaging their health which, coincidentally, is the same proportion of German respondents who say they spend too much time on electronic devices (the lowest of all the countries).

52% of global respondents, and 67% of respondents in Brazil, believe they spend too much time on electronic devices. 43% of Brazilians also feel they are suffering from “digital overload”.

73% of global respondents believe reading printed books is more enjoyable than reading e-books. 69% believe printed magazines are more enjoyable and 62% believe reading printed newspapers is more enjoyable than electronic alternatives.

Despite the majority of global respondents enjoying reading print more than digital, plus the concerns about the overuse of electronic devices, 63% of respondents are reading fewer printed magazines than they used to, 61% are reading fewer printed newspapers, and 45% are reading fewer printed books.

However, 69% of all respondents do believe it is important to “switch off” and enjoy print more.



## Findings at a glance

- France: 79% think it's important to “switch off” and enjoy printed books and magazines
- U.S.: 73% believe reading a printed magazine is more enjoyable than reading a magazine on an electronic device
- UK: 72% believe reading a printed book is more enjoyable than reading a book on an electronic device
- Brazil: 67% believe they spend too much time on electronic devices
- Spain: 60% are concerned the overuse of electronic devices could be damaging to their health

**69%**  
BELIEVE IT IS  
IMPORTANT TO  
“SWITCH OFF”



# 5. ADVERTISING PREFERENCES

The benefits and pitfalls of online advertising is a hotly-debated topic amongst marketing professionals. The lack of independent regulation, ad-blocking and controversial measurement techniques are well-covered topics in most industry journals and websites. But at a very fundamental level, how do consumers feel about the ads they see online?

The survey found that online advertising is viewed negatively by the majority of global respondents, as 68% of respondents do not pay attention to advertisements online. At 78%, the UK has the highest proportion of respondents who do not pay attention to online ads. 72% of respondents in the UK also can't remember the last time they willingly clicked an online ad.

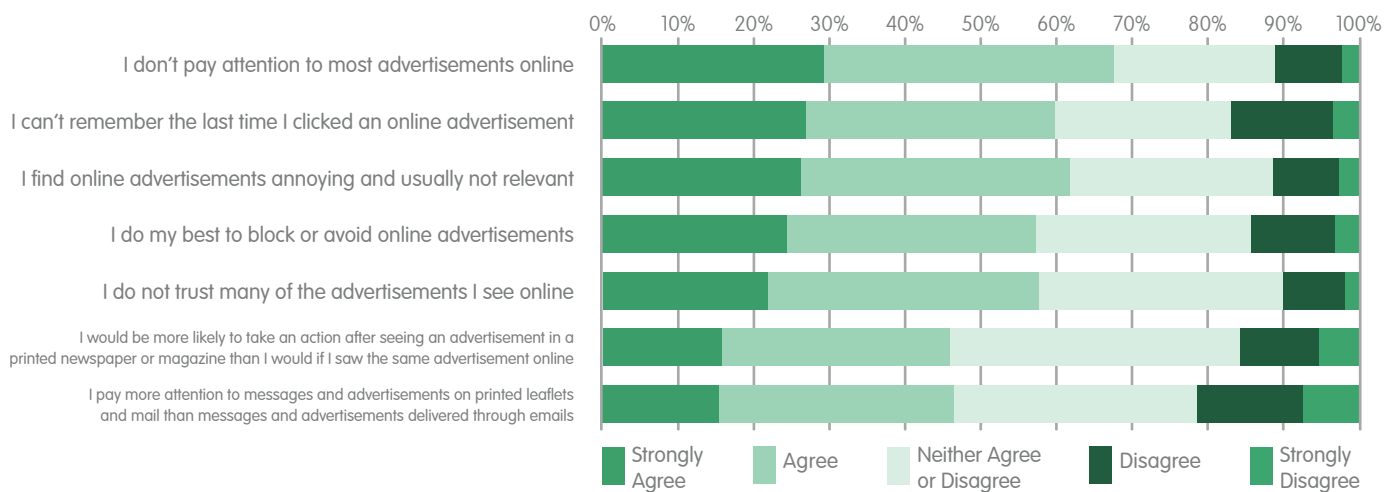
Overall, 62% of global respondents and 69% of respondents in both the U.S. and the UK find online ads annoying and usually not relevant.

Ad-blocking is a major issue for both advertisers and website owners, who risk losing revenue as a result. 58% of all respondents do their best to block or avoid online ads. The UK has the highest number of respondents avoiding or blocking ads at 64%, closely followed by respondents in the U.S. and France at 63%.





The survey also revealed a significant lack of trust in online advertising. 58% of global respondents do not trust many of the ads they see online. In France, 63% of respondents don't trust online ads.

When comparing online ads to print ads, 46% of global respondents would be more likely to take action after seeing an ad in a printed newspaper or magazine than if they saw the same ad online. In the U.S., this figure rises to 54%.

46% of global respondents also pay more attention to messages and advertisements in printed leaflets and mail than messages and advertisements delivered through emails. In France, 59% of consumers pay more attention to printed leaflets and mail.



## Findings at a glance

-  UK: 78% don't pay attention to most online ads
-  Australia: 66% of consumers in Australia can't remember the last time they willingly clicked an online ad
-  Germany: 64% find online advertisements annoying and usually not relevant
-  U.S.: 54% are more likely to take action after seeing an ad in a printed newspaper or magazine than if they saw the same ad online

**58%**  
DON'T TRUST  
MANY OF THE  
ADVERTS THEY  
SEE ONLINE



# 6. THE DRIVE TO DIGITAL

**Financial organisations, utilities, telecoms and governments are increasingly encouraging their customers to go “paperless”. But switching to digital is not always welcome as many consumers value paper-based communication.**

89% of global respondents believe they have the right to choose how they receive communications (printed or electronically) from financial organisations and other service providers. A further 83% of all respondents expect to have the option to go back to paper communication if they want to. 58% of respondents in Brazil, and 44% of respondents globally, would consider switching to an alternative financial organisation or service provider if they were forced to go digital.

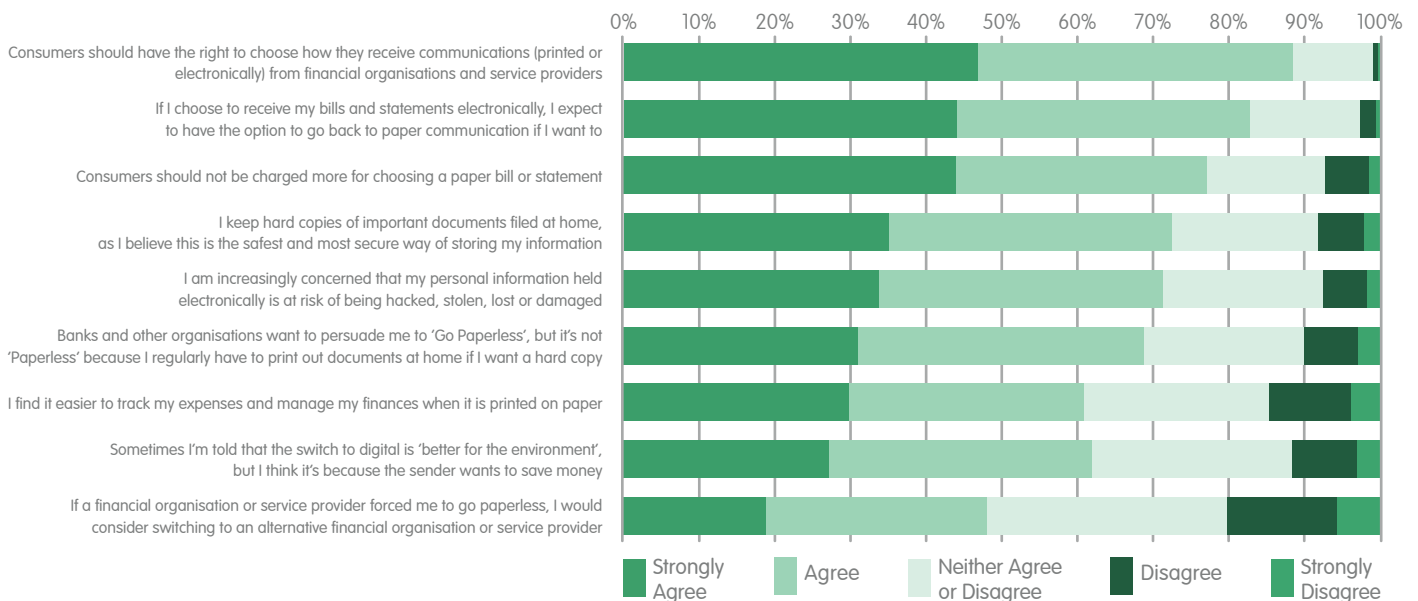
Many service providers charge fees if their customers wish to receive paper communications, but 77% of global respondents believe they should not be charged more for choosing paper bills and statements. In the U.S., 83% of consumers believe this essential service should not cost them extra.

Paper records are important to consumers for security purposes. 73% of global respondents keep hard copies of important documents filed at home, as they believe this is the safest and most secure way of storing their information. 71% of all respondents are increasingly concerned their personal information held electronically is at risk of being hacked, stolen, lost or damaged.






Overall, 61% of respondents find it easier to track their expenses and manage their finances when printed on paper. 74% of consumers in France find it easier to manage their finances when printed on paper.

Claims such as “Go Green - Go Paperless” and “Save Trees” are common messages used by many organisations to encourage their customers to switch to electronic communication, but consumers are suspicious of such claims. 62% of global respondents believe the switch to digital is because the sender wants to save money, not because it is “better for the environment”.

Even when service providers only communicate with their customers electronically, going “paperless” is often unachievable as 69% of all respondents regularly print out documents at home.



## Findings at a glance

-  South Africa: 93% believe they should have the right to choose how they receive communications from financial organisations and service providers
-  UK: 84% believe if they choose to receive bills and statements electronically, they expect to have the option to go back to paper communication
-  U.S.: 83% believe they should not be charged more for choosing paper bills or statements
-  Spain: 79% are increasingly concerned their personal information held electronically is at risk of being hacked, stolen, lost or damaged
-  France: 74% find it easier to track expenses and manage finances when it is printed on paper

**77%**  
BELIEVE THEY SHOULD NOT BE CHARGED MORE FOR CHOOSING PAPER BILLS & STATEMENTS





# ABOUT TWO SIDES

Two Sides, formed in 2008, is a global initiative by companies from the graphic communications industry including forestry, pulp, paper, inks and chemicals, pre-press, press, finishing, publishing, printing, envelopes and postal operators. Our common goal is to provide users with verifiable information on why print and paper is an attractive, practical and sustainable communications medium.

By uniting with common purpose behind Two Sides, the graphic communications industry aspires to ensure that, in a world of scarce resources, print and paper's unique recyclable and renewable qualities can be enjoyed for generations to come.

Two Sides is further committed to ensuring that print and paper also remains a versatile, attractive and powerful means of marketing and communication, stretching the imagination and imparting knowledge

## How can I participate?

Two Sides globally is supported by several hundred organisations from the graphic communications industry. Members are required to adopt the Two Sides Principles on environmental performance and pay an annual membership fee.

## CONTACT US

For more information about the report, or to learn more about Two Sides, please contact us.



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