

# **Print and Paper in a Digital World: Consumer preferences, attitudes & trust**

## **Key Findings for the U.S.**

November 2017

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environmental  
story to tell



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# What is Two Sides?

- Industry-funded non-profit present globally in 5 continents
- >1,000 members from the Graphic Communications Industry



## MISSION

1. Provide verifiable information on why print & paper can be a sustainable way to communicate.
2. Dispel common environmental misconceptions.

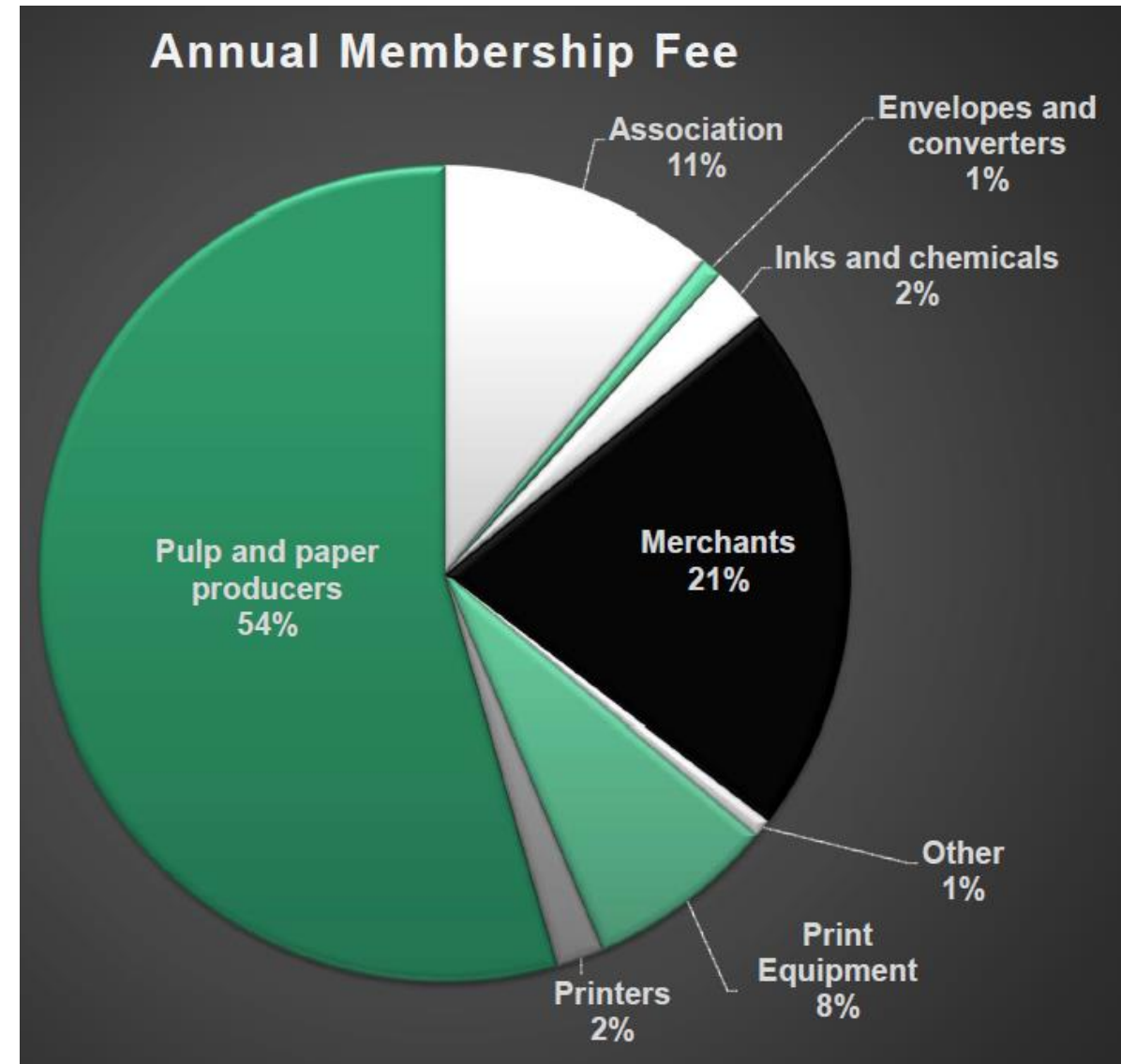
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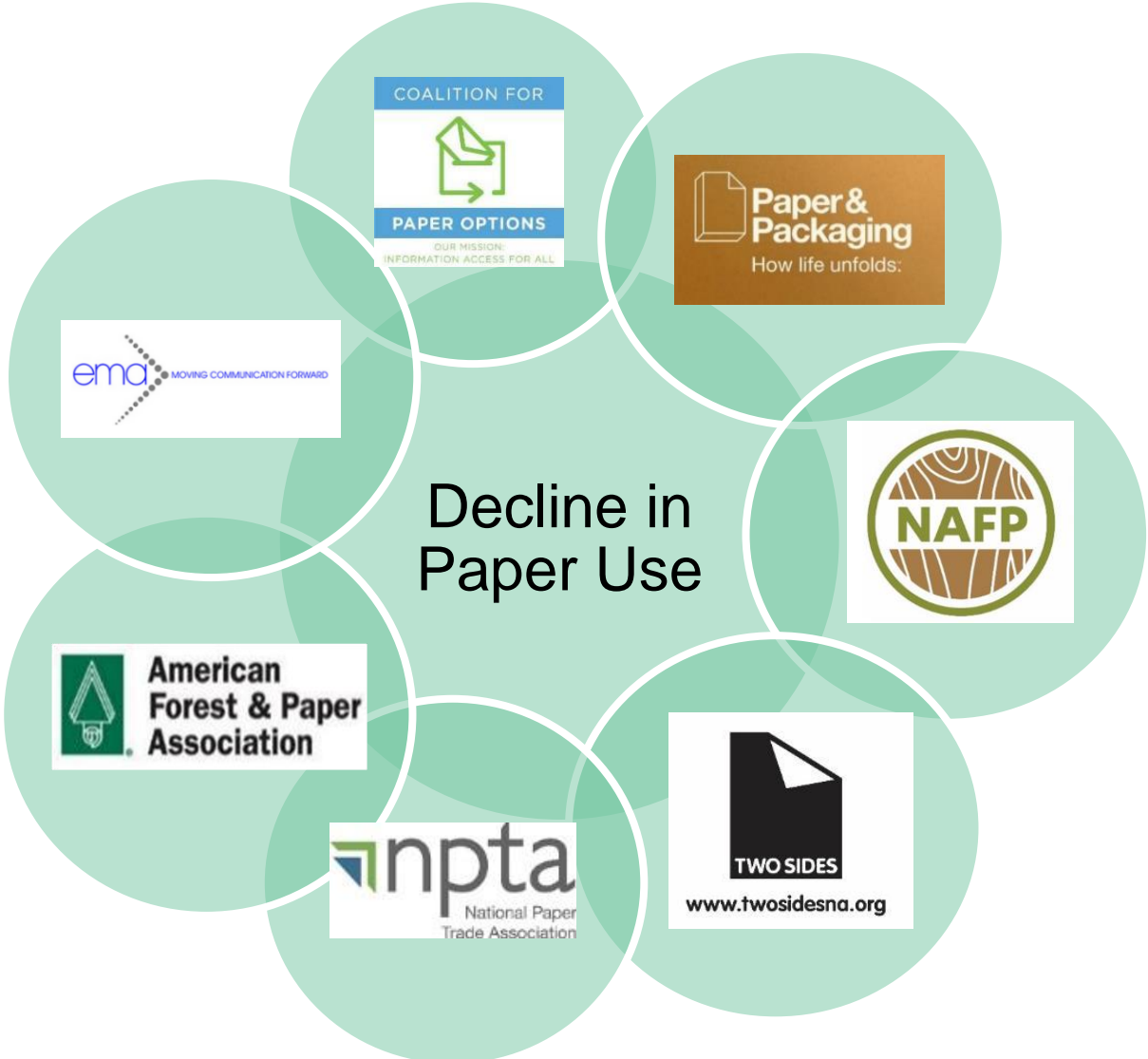
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# >160 Members & Allies in North America

- Paper producers and merchants
- Printers and converters
- Suppliers to the pulp, paper and printing industries
- Publishers
- Environmental think tanks
- >12 universities
- Industry & trade associations



# Multiple Organizations Addressing the Decline in Paper Use



All organizations listed sit on the Two Sides Board of Directors or one of our three Task Forces

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# International survey of consumer preferences, attitudes and trust

- >10,700 consumers (Toluna, June 2017)
- Australia, Brazil, France, Germany, Italy, New Zealand, South Africa, Spain, the United Kingdom and the United States.
- Report explores:
  - Reading preferences + reading frequency for different forms of communication channels
  - Trust & understanding in news media channels
  - Attitudes towards advertising & marketing channels
  - Attitudes towards the drive to all digital-based communications

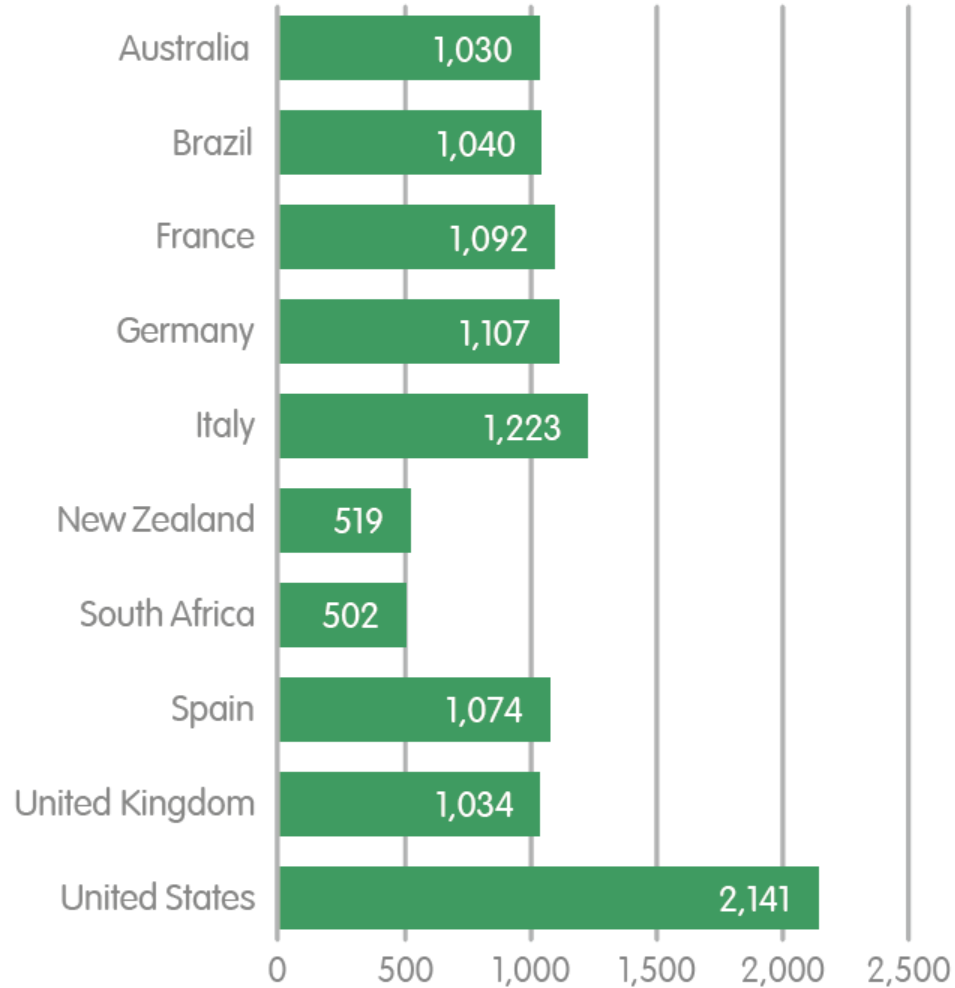


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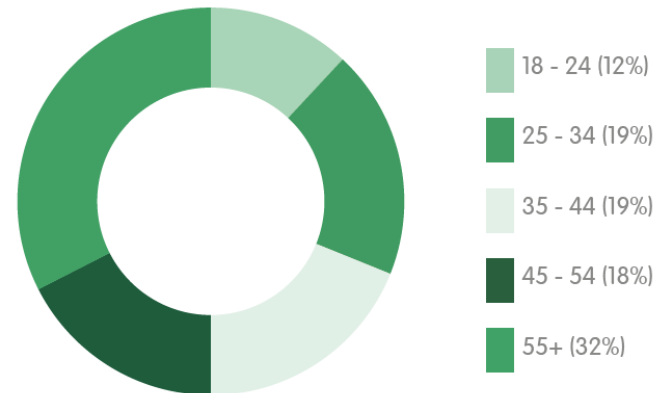
## Sample Size Breakdown



## Global Study Gender Breakdown



## Global Study Age Breakdown



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# Overall Findings



Consumers trust, enjoy and gain a deeper understanding of information read in print, with signs of digital fatigue and concern for electronic security and privacy evident.

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# Report and Key US Findings available HERE

## PRINT AND PAPER IN A DIGITAL WORLD

### KEY FINDINGS FROM THE US SURVEY

In June 2017, a survey of 2,131 US consumers was commissioned by Two Sides and carried out by leading research company Toluna. The survey provides unique insight into how print and paper is viewed, preferred and trusted by consumers in today's digital world.

**US Study Gender Breakdown**

- Male (48%)
- Female (52%)

**US Study Age Breakdown**

- 18 - 24 (12%)
- 25 - 34 (19%)
- 35 - 44 (16%)
- 45 - 54 (17%)
- 55+ (36%)

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

The survey found print to be the preferred choice for recreational reading in the US: magazines (66%), books (62%) and news/newspapers (61%). Although printed newspapers were generally preferred over digital options, clear generational differences were noted. 74% of over 55s prefer to read news in print, but the younger the respondent was, the less likely they were to prefer print - with just 35% of the 18-24 year olds choosing print. Smartphones were the most popular format for news consumption amongst the 18-24 year olds at 29%. Printed books were preferred across all age groups, followed by tablets at 15%. 73% of those surveyed believe reading a printed book is more enjoyable than reading a book on an electronic device, including 72% of the 18-24 year olds.

40-50% prefer to read bank, internet and phone statements on their computers. Printed statements were preferred by 32-52%, especially for important documents such as tax statements (52%) and personal information from doctors and hospitals (49%).

65% say they prefer to receive bills and financial statements through a combination of both online and on paper. However, the under 45 age groups had a stronger preference for digital options.

**Consumers want to retain the right to choose how they receive communications**

The survey found that 90% of US consumers believe they should have the right to choose how they receive communications (printed or electronically) from financial organizations and service providers, including 88% of 18-24 year olds. 83% say they should not be charged more for choosing a paper bill or statement.

**Print provides more privacy and security**

76% of consumers are increasingly concerned that their personal information held electronically is at risk of being hacked, stolen, lost or damaged and 79% keep hard copies of important documents filed at home, as they believe this is the safest and most secure way of storing their information.

**Print is trusted and provides a deeper understanding to the reader**

More consumers believe they gain a deeper understanding of the story when read from newspapers (71%) over online news sources (57%). 73% of all respondents believe "fake news" is a worrying trend and just 35% trust the news stories found on social media while 58% trust the news they read in printed newspapers. The 55+ age group was less trusting of both printed and online news sources: just 39% say they trust the news stories they read in printed newspapers, and only 7% say they trust the news stories on social media.

**News consumption habits are changing**

The results reveal that consumers still spend a lot of time reading printed products every week. 39% read printed newspapers every day and a further 24% read a paper at least once a week. Despite 61% of respondents preferring to read news in print, in practice, more are reading news on electronic devices on a daily (42%) and weekly (32%) basis. 67% of 18-24 year olds say they prefer to get their news online for free and 52% say they will read more news online in the future.

Despite the shift to reading more news online, 64% of respondents would be very concerned if printed newspapers were to disappear in the future.

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

The amount of time that consumers spend looking at screens is concerning to them, especially for the youngest age group. 54% believe they spend too much time on electronic devices (65% for 18-24 year olds) and 53% are concerned the overuse of electronic devices could be damaging to their health (62% of 18-24 year olds). 36% feel they are suffering from "digital overload" (47% of 18-24 year olds). Although 67% think it's important to "switch off" from screens, 67% of respondents claim they are reading fewer printed magazines than they used to and 53% are reading fewer books.

**Online advertising is unpopular with most consumers**

The results reveal that 71% of US consumers do not pay attention to online advertisements and 63% do their best to block or avoid them. 69% of respondents say they find online ads annoying and 66% say they can't remember the last time they willingly clicked an online ad.

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PRINT AND PAPER IN A DIGITAL WORLD: US KEY FINDINGS

TWO SIDES NORTH AMERICA, INC.

### The Drive to Digital and Consumer Choice

- 90%** believe consumers should have the right to choose how they receive communications (printed or electronic) from financial organizations and service providers and 83% believe they should not be charged more for choosing a paper bill or statement.
- 73%** agree that government, banks and other organizations want to persuade them to "go paperless", but it's not "paperless" because they regularly have to print out documents at home if they want a hard copy. In fact, 68% find it easier to track their expenses and manage their finances when they are printed on paper.
- 72%** agree that claims about the switch to digital being better for the environment are made because the sender wants to save money.
- 57%** believe that if a financial organization or service provider forced them to go paperless, they would consider switching to an alternative financial organization or service provider.

### Safety and Security

- 76%** are increasingly concerned that their personal information held electronically is at risk of being hacked, stolen, lost or damaged and 78% keep hard copies of important documents filed at home as they believe this is the safest and most secure way of storing their information.

### Trust

- 74%** indicated that fake news is a worrying trend. 56% trust the news stories they read in printed newspapers, and only 35% trust the news stories they read on social media.

### Reading Preferences and Habits

- 73%** feel that reading a printed book or magazine is more enjoyable than reading them on an electronic device, followed by newspapers at 65%.
- 71%** believe that reading news in a printed newspaper provides a deeper understanding of the story, and 63% read a printed newspaper at least once a week.

### Digital Overload

- 66%** think it's important to "switch off" and enjoy printed books and magazines.
- 54%** say they spend too much time on electronic devices and 53% are concerned that the overuse of e-devices could be damaging to their health.

### Advertising Preferences

- 71%** don't pay attention to most advertisements online and 63% read printed advertising mail (at least once a week) that's addressed to them and delivered to their home.
- 59%** do not trust many of the ads they see online.

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# 1. Many consumers prefer and enjoy reading in print



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**73%**

**FEEL THAT READING  
A PRINTED BOOK OR  
MAGAZINE IS MORE  
ENJOYABLE THAN  
READING THEM ON  
AN ELECTRONIC  
DEVICE**



# 71%

**BELIEVE THAT  
READING NEWS IN A  
PRINTED NEWSPAPER  
PROVIDES A DEEPER  
UNDERSTANDING OF THE  
STORY, AND 63% READ  
A PRINTED NEWSPAPER AT  
LEAST ONCE A WEEK**



# Print - The preferred choice for recreational reading in the US

- Magazines (66%)
- Books (62%)
- News/newspapers (61%)
  
- Generational differences:
  - 74% of >55s prefer to read news in print
  - Younger = less likely to prefer print
  - 35% of the 18-24 years olds chose print.
  
- Smartphones - most popular format for news consumption for 18-24 year olds at 29%.



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# What about bills and statements?



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**68%**

**FIND IT EASIER TO  
TRACK THEIR EXPENSES  
AND MANAGE THEIR  
FINANCES WHEN  
THEY ARE PRINTED  
ON PAPER**

# 57%

WOULD CONSIDER  
SWITCHING TO AN  
ALTERNATIVE FINANCIAL  
ORGANIZATION OR  
SERVICE PROVIDER IF  
THEY WERE FORCED  
TO GO PAPERLESS



#PAPERFACTS



# More on bills statements

- 40-50% prefer to read bank, internet and phone statements on their computers.
- Printed statements preferred by 32-52%, esp. for important documents.
  - Tax statements (52%)
  - Personal information from doctors / hospitals (49%)
- 65% prefer to receive bills & financial statements through a combination of both online and on paper.
  - <45 age groups had a stronger preference for digital options



## 2. News consumption habits are changing

- U.S. consumers still spend a lot of time reading printed products every week.
- 64% of respondents would be very concerned if printed newspapers were to disappear in the future.
- 39% read printed newspapers daily and a further 24% read a paper 1/week.
- 61% prefer reading news in print...BUT
- ...more people are reading news on e-devices (than print) on a daily (42%) & weekly (32%) basis.
- 67% of 18-24 y.o. prefer to get news online for free & 52% say they will read more news online in the future.



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### **3. Consumers want to retain the right to choose how they receive communications**



# 90%

**BELIEVE CONSUMERS SHOULD HAVE THE RIGHT TO CHOOSE HOW THEY RECEIVE COMMUNICATIONS (PRINTED OR ELECTRONIC) FROM FINANCIAL ORGANIZATIONS AND SERVICE PROVIDERS**



**#PAPERFACTS**



# “Opting-in” for paper and paper fees are becoming more common

**verizon**<sup>✓</sup> Shop My Verizon

**Your paper-free billing starts 09/10/2016.**

Account ending in #4652.

The same bill you used to get in the mail is available on the [My Verizon Mobile app](#) or [My Verizon website](#). Each month, we'll send you text and/or email reminders with your balance, due date and a link to securely view your billing statement.



Many aren't computer-savvy, don't use computers + 49% don't have a reliable internet connection & want paper

[CLICK HERE TO GET OUR FACT SHEET](#)

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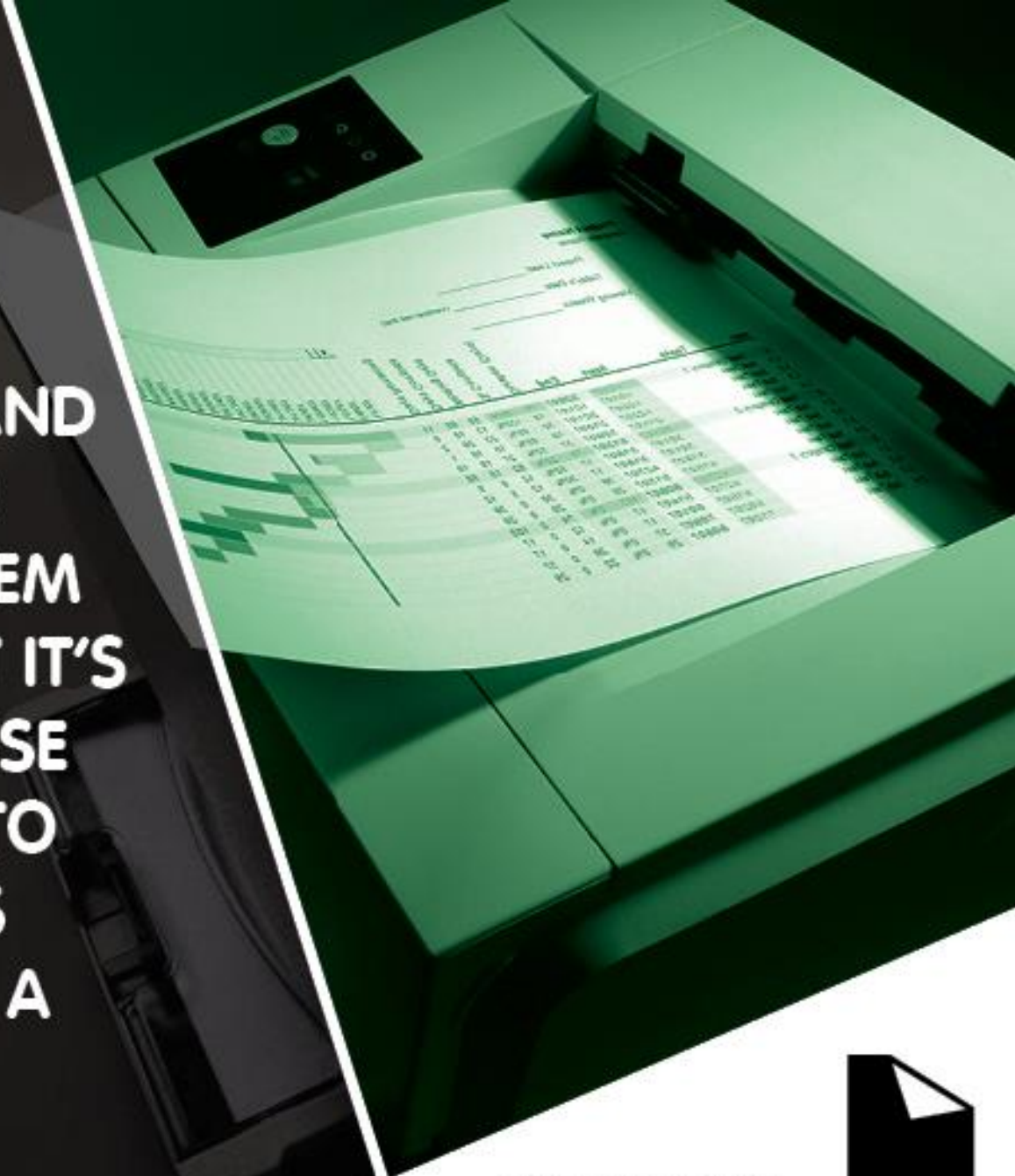
**83%**

**BELIEVE THEY SHOULD  
NOT BE CHARGED  
MORE FOR CHOOSING  
A PAPER BILL OR  
STATEMENT**



# 73%

**AGREE THAT  
GOVERNMENT, BANKS AND  
OTHER ORGANIZATIONS  
WANT TO PERSUADE THEM  
TO 'GO PAPERLESS', BUT IT'S  
NOT 'PAPERLESS' BECAUSE  
THEY REGULARLY HAVE TO  
PRINT OUT DOCUMENTS  
AT HOME IF THEY WANT A  
HARD COPY**







**72%**

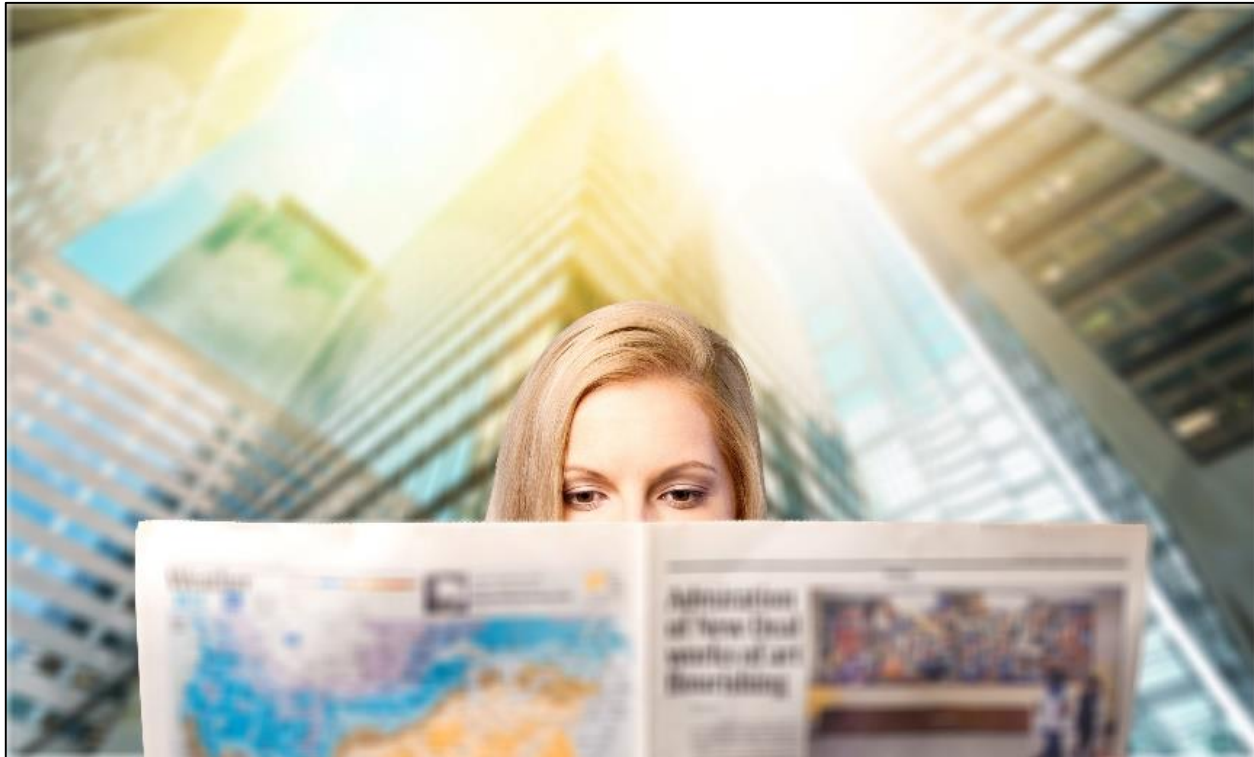
**AGREE THAT  
CLAIMS ABOUT THE  
SWITCH TO DIGITAL  
"BEING BETTER FOR  
THE ENVIRONMENT"  
ARE MADE BECAUSE THE  
SENDER WANTS TO SAVE  
MONEY**

**#PAPERFACTS**





## 4. Print provides more privacy and security, and is more trusted



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# 78%

KEEP HARD COPIES  
OF IMPORTANT  
DOCUMENTS FILED AT  
HOME AS THEY BELIEVE  
THIS IS THE SAFEST  
AND MOST SECURE  
WAY OF STORING THEIR  
INFORMATION





# 76%

ARE INCREASINGLY  
CONCERNED THAT  
THEIR PERSONAL  
INFORMATION HELD  
ELECTRONICALLY IS AT  
RISK OF BEING HACKED,  
STOLEN, LOST OR  
DAMAGED



74%

INDICATED THAT  
FAKE NEWS IS A  
WORRYING TREND







# 56%

**TRUST THE NEWS STORIES  
THEY READ IN PRINTED  
NEWSPAPERS, AND ONLY  
35% TRUST THE NEWS  
STORIES THEY READ  
ON SOCIAL MEDIA**

**#PAPERFACTS**





## 6. Concerns about the impacts of digital consumption on health



What impact are technologies such as computer games, the Internet and social media having on the brain?

**SEE: <http://www.susangreenfield.com> and [Screenagers](#)**

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**66%**

**THINK IT'S  
IMPORTANT TO  
"SWITCH OFF" AND  
ENJOY PRINTED  
BOOKS AND  
MAGAZINES**



**#PAPERFACTS**



**TWO SIDES**



**54%**

**SAY THEY SPEND  
TOO MUCH TIME ON  
ELECTRONIC DEVICES**





# 53%

ARE CONCERNED  
THAT THE OVERUSE  
OF E-DEVICES COULD  
BE DAMAGING TO  
THEIR HEALTH



# Younger age groups are the MOST concerned

- I spend too much time on e-devices:
  - 65% for 18-24 year olds
  - 54% overall
- I am concerned the overuse of e-devices is damaging to my health:
  - 62% 18-24 y.o.
  - 53% overall
- I feel that I am suffering from “digital overload”:
  - 47% of 18-24 y.o.
  - 36% overall



# 7. Online advertising is unpopular with most consumers





**71%**

**DON'T PAY  
ATTENTION  
TO MOST  
ADVERTISEMENTS  
ONLINE**

PRINT AND PAPER IN A DIGITAL WORLD: [TWO SIDES NA.ORG/SURVEY2017](https://twosidesna.org/survey2017)

**#PAPERFACTS**





**63%**

**READ PRINTED  
ADVERTISING MAIL  
AT LEAST ONCE A WEEK  
THAT'S ADDRESSED TO  
THEM AND DELIVERED  
TO THEIR HOME**

**#PAPERFACTS**





**59%**

**DO NOT TRUST  
MANY OF THE ADS  
THEY SEE ONLINE**





# Print – More effective for advertising

- 66% say they can't remember the last time they willingly clicked an online ad.
- 63% do their best to block or avoid them.
- 54% are more likely to take action after seeing an ad in print vs same ad online.



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# Previous Studies and Results

TWO SIDES & TOLUNA, 2016

- 91% agreed that, when responsibly produced, used & recycled, print & paper can be a sustainable way to communicate.
  - 19% incr. over 2013 (72%)
- 88% agreed that, when forests are responsibly managed, it is environmentally acceptable to use trees to produce products such as wood for construction & paper for printing.
- **FOR MUCH MORE RESULTS AND GREAT FACTS,  
EMAIL [INFO@TWOSIDESNA.ORG](mailto:INFO@TWOSIDESNA.ORG)**



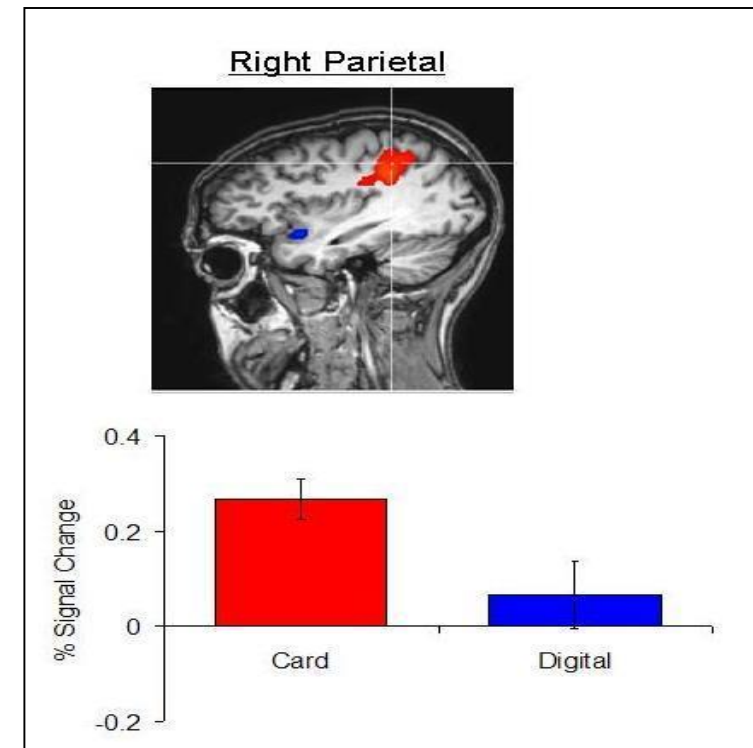
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# PRINT AND PAPER...

- Unique sustainable features - unmatched by most products
- Supports well managed forests
- Provides a more emotional (real) connection than screens
- Great benefits for learning and literacy
- Preferred communication channel by most people
- Less harmful to health than screens





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## SIGN UP FOR E-NEWS!



## LINKS TO OUR MOST POPULAR MATERIALS:

- [Infographics](#)
- [Fact Sheets](#)
- [Myths and Facts](#)
- [Blog](#)
- [News](#)

Click the icons below to join us on Social Media & Share!

Get the [#PaperFacts](#)



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# THANK YOU!

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