

PRINT AND PAPER IN A DIGITAL WORLD

An Australian survey
of consumer preferences,
attitudes and trust



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INTRODUCTION

A global survey of 10,700 respondents was commissioned by Two Sides and carried out by independent research company Toluna in June 2017. The survey was undertaken in: Australia, Brazil, Europe - Austria, France, Germany, Italy and Spain, South Africa, New Zealand, North America and the United Kingdom.

This report analyses responses from Australian consumers, with a survey sample of 1,030, providing insight into consumer preferences, attitudes and trust for paper and print 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 in 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 devices: this term includes tablets, smartphones, e-readers, laptop or desktop computer.

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

Online devices: this term includes tablets, smartphones, e-readers, laptop or desktop computer.

Flyers & leaflets: product catalogues

Telcos: broadband and telephone service providers

Agree: this term includes respondents that both agree and strongly agree

About Two Sides

Two Sides is a global initiative by companies from the Graphic Communication Value Chain including forestry, pulp, paper, inks and chemicals, pre-press, press, finishing, publishing, envelopes and printing. Our common goal is to dispel environmental misconceptions, by providing users with verifiable information on why paper and print is an attractive, practical and sustainable communications medium.

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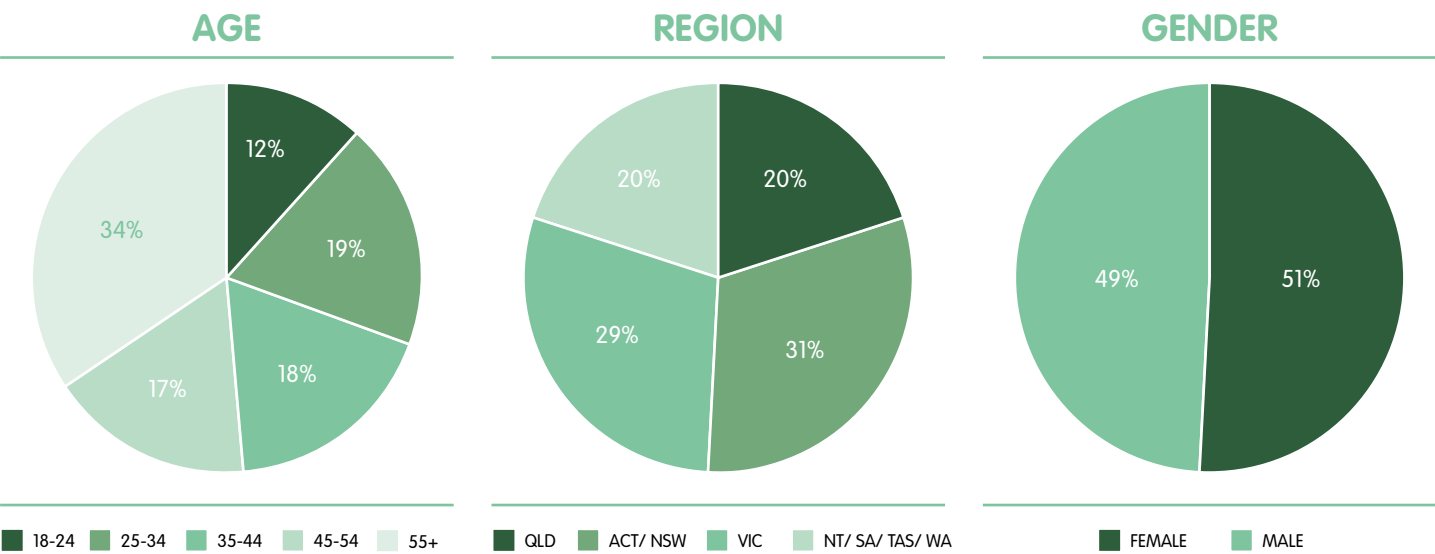
About Toluna

Toluna is an online market research company. Connecting consumers and brands together via the world's largest social voting community of 9+ million members across 49 countries.

Toluna applies a cross channel approach to member engagement delivering real-time access to respondent insight. Toluna's community is well-profiled, active and reaches survey respondents across the globe.

THE AUSTRALIAN SURVEY

The survey collected responses from 1,030 Australians, with individuals working in the paper, printing or allied industries excluded from the survey. The split by age, region and gender was as follows:



EXECUTIVE SUMMARY

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

Many Australians prefer and enjoy reading in print

The research examines reading preferences for different forms of communications and the results indicate that Australians prefer to read the printed version of books (72%), magazines (72%) and newspapers/news (56%) over digital channels. Many Australians also indicate that reading them in print is more enjoyable than reading online.

Communications from energy and utility (38%), mobile (29%), broadband (30%) and banks (30%) hold preference for print, however, if we combine the two computer channels (laptop/desktop) a preference trend line can be drawn in favour of digital: energy and utility (48%), mobile (50%), broadband (56%) and banks (53%). Challenging these preference findings is consumer attitudes, which show a rejection of the drive to digital, as 86% of consumers agreed they should have the right to choose how they receive communications (printed or electronically), without charge, from financial organisations and service providers.

Australians trust print and gain a deeper understanding when reading print

The survey findings reveal that more Australians gain a deeper understanding when read from print media (61%) over digital media (44%). On top of gaining a better understanding, Australians also trust the stories read in printed newspapers (44%) more than stories found on social media (22%). This information is supported by Roy Morgan Research that indicates only 21% of Australians mention any form of online media as trusted media. A majority of Australians (73%) also indicated they are concerned about the trend of "Fake News".

Although Australians trust and gain a better understanding of media stories in print over digital, many (47%) will continue to read more news online in the future. Deloitte's 2017 'Media Consumer Survey' reports that news media consumption has decreased across digital channels by 3% from 2016 to 2017, and social media by 4% across the same period, highlighting consumer trends could still be shifting.

Reading habits vary depending on content

When questioning respondents' reading habits in print or digital many Australians indicated that the amount of time spent reading a book (47%), magazine (65%) or newspaper (61%) is less now than in the past. However, when Australians are reading magazines or books, they tend to read the printed versions more regularly (33% magazines, 47% books). When consuming news media, a majority read it via a digital device regularly (67%).



There is concern about the impacts of digital consumption on health

With 20 hours per week spent online for the average Australian², many agreed (48%) that they spend too much time on electronic devices with a majority (52%) concerned the overuse of electronic devices could be damaging to health (eyestrain, sleep deprivation, headaches). A further one third agree they are suffering from "digital overload".

Australians respond to print marketing and advertising messaging

Advertising and marketing communication preferences were also examined with the results indicating that a majority (63%) prefer to read product catalogues in print and on average, Australians agree (47%) that they like receiving personally-addressed advertising mail and printed leaflets delivered to their home, with many (47%) paying attention to them.

In terms of reading frequency for marketing and advertising collateral, the tendency to consume information from printed leaflets, catalogues and other unaddressed mail as well as direct advertising mail is higher (53%) than marketing emails (42%). A further half (50%) 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 advert online.

1. Business Insider, 2015 2. Roy Morgan Research, 2017. State of the Nation, Media Report

Online marketing and advertising is relatively unpopular with most Australians

The results reveal that many Australians do not pay attention (72%) to online advertisements and a majority (62%) do their best to avoid them. With more (66%) agreeing they can't remember the last time they willingly clicked an online advertisement. Similar results were concluded from Deloitte's 2017 'Media Consumer Survey', which reported that 77% of respondents stated that they would skip an ad playing before a video game if given the choice. The report also indicated that many Australians would sooner pay for content to avoid ads.

Australians believe that consumers should have the right to choose how they receive communications

The drive to all digital-based communications was examined and findings indicate that a strong majority (86%) of Australians believe that consumers should have the right to choose how they receive communications (printed or electronically), without penalty, from financial organisations and service providers.

Print provides more privacy and security

Findings also indicate that Australians (66%) have privacy concerns with personal information being held electronically, and Australians (69%) believe that keeping hard copies at home is a safe and more secure way of storing information.

KEY FINDINGS



66%

agreed that it's important to "switch off" and enjoy printed books and magazines

52%

are concerned the overuse of electronic devices could be damaging to health (eyestrain, sleep deprivation, headaches)



72%

of Australians prefer to read books and magazines in print and 56% prefer to read news in print

47%

read a printed book at least once a week while only 24% use an e-reader

63%

prefer to read product catalogues in print

72%

of Australians do not pay attention to online advertisements

67%

agreed they find online advertisements annoying



67%

regularly read their news on a digital device, but 59% would be concerned if printed newspapers disappeared

47%

plan to read more news online in the future, but only 22% trust the news found on social media

73%

indicated they are concerned about the trend of "Fake News"



86%

of Australians believe that consumers should have the right to choose how they receive communications (printed or electronically), at no extra charge, from financial organisations and service providers

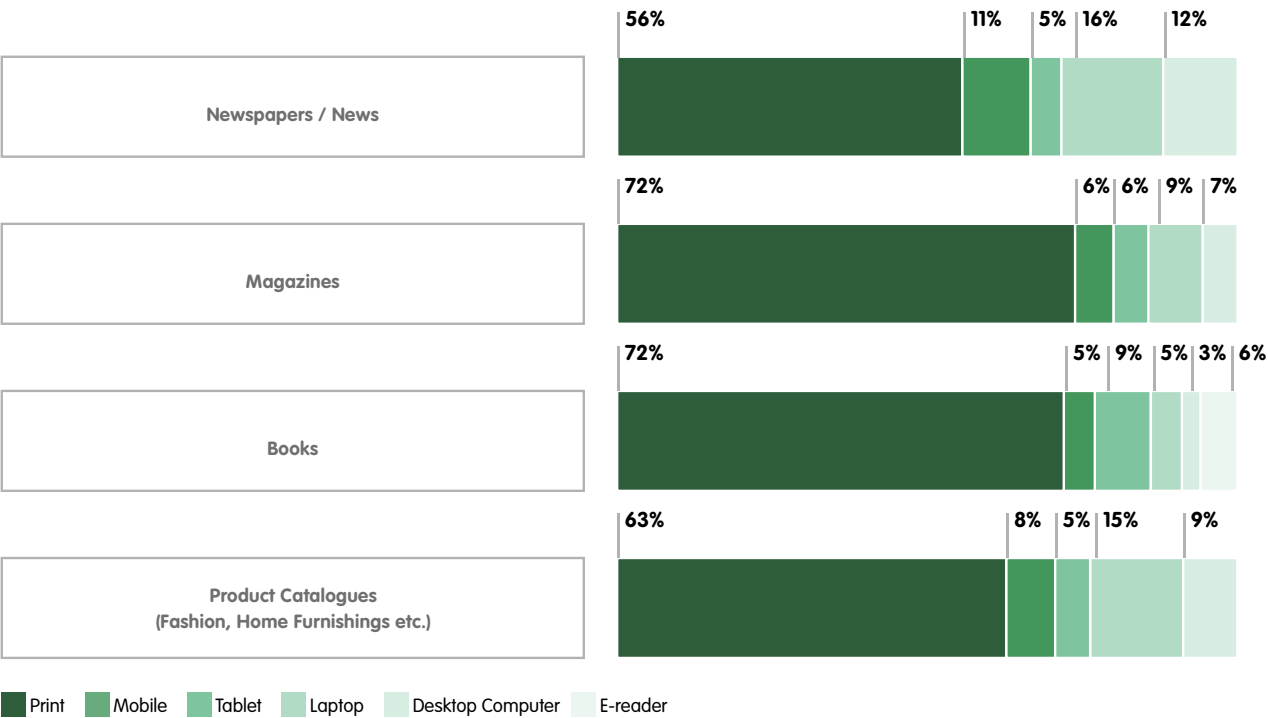
69%

of Australians believe that keeping hard copies at home is the safest and more secure way of storing information

1. READING PREFERENCES

As consumers, we have a range of electronic devices to choose from when consuming media and information. But given the choice, what format do consumers prefer?

I PREFER TO READ...

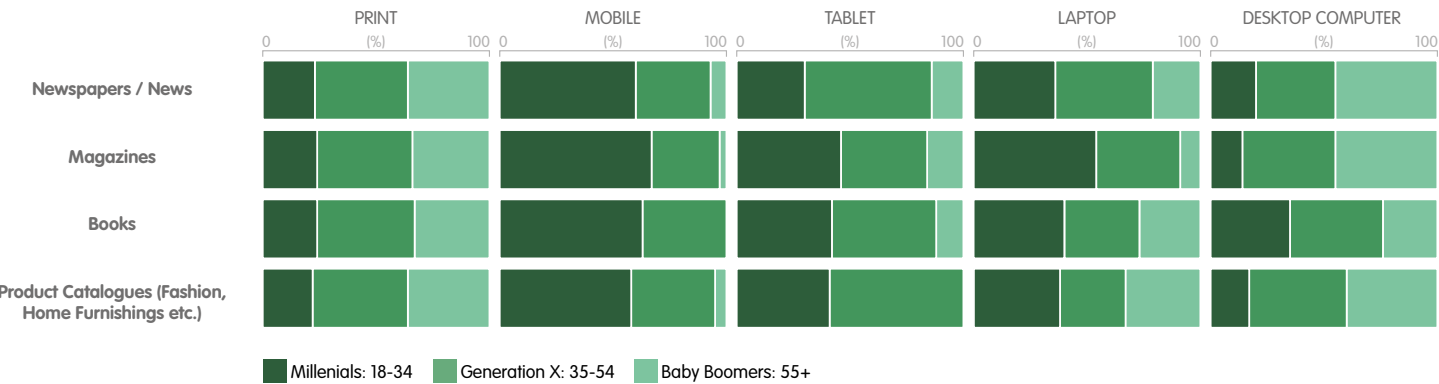


FINDINGS AT A GLANCE

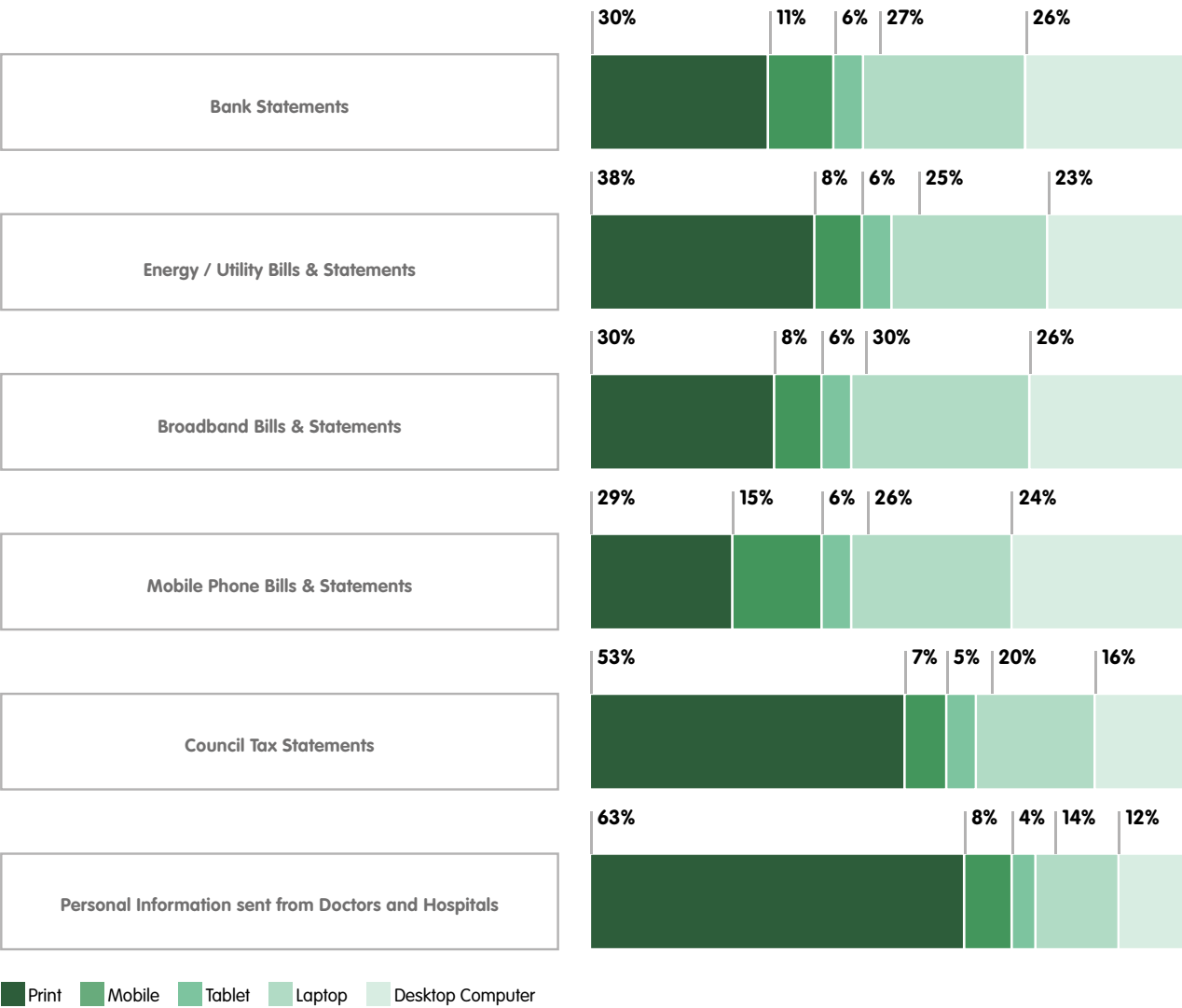
- **72%** prefer to read books in print
- **56%** prefer to read Newspapers/ News in print
- **63%** prefer to read product catalogues in print



READERSHIP PREFERENCES BY GENERATION



I PREFER TO RECEIVE INFORMATION FROM SERVICE PROVIDERS...



FINDINGS AT A GLANCE

- **63%** prefer to receive personal information sent from Doctors and Hospitals in print
- **53%** prefer to receive Council Rates Notice in print
- **38%** prefer to receive energy and utility bills and statements in print
- **30%** prefer to receive broadband bills and statement in print and laptop
- **30%** prefer to receive bank statements in print
- **29%** prefer to receive mobile phone bills and statements in print
- **15%** prefer to receive information mobile phone bills and statements via mobile
- **4-6%** prefer to receive information from service providers via tablets

Consumers report a strong preference for print when it comes to reading magazines, books, products catalogues and newspapers/ news.

When the data was broken down into age demographics by channel, reading preference remains relatively the same across all channels for each age group. For example, Generation X recorded a consistent preference for print across newspapers/news (41%), magazines (42%), books (43%) and product catalogues (42%) showing only a 2% difference across all four of the channels.

At the same time, analysis of the data shows there are large preference discrepancies between age groups. For example, Millennials represent 60% of the 11% of those who prefer to read their newspaper/news on mobile, whereas Baby Boomers only represent 7% of them.

When looking at how consumers prefer to receive information from service providers, results indicate consumers prefer to receive information in print, with the highest being from council or doctors.

However, if we combine the two computer channels (laptop/desktop) a preference trend line can be drawn in favour of digital for utility and telecommunications. Tablets are the least preferred for receiving information from service providers.

Interestingly, preference for mobile phone bills and statements via mobile sees the highest preference at 15% for mobile compared to other service providers. Mobile service providers are evidently utilising their channel well, as otherwise, mobile sits second lowest in preference next to tablets.

2. READING FREQUENCY

As consumers, we have a range of communication channels to choose from when consuming media and information. With so much choice, what channels do consumers use and prefer? A series of ‘How often do you’ questions were asked to gain insight.

CONSUMER READERSHIP

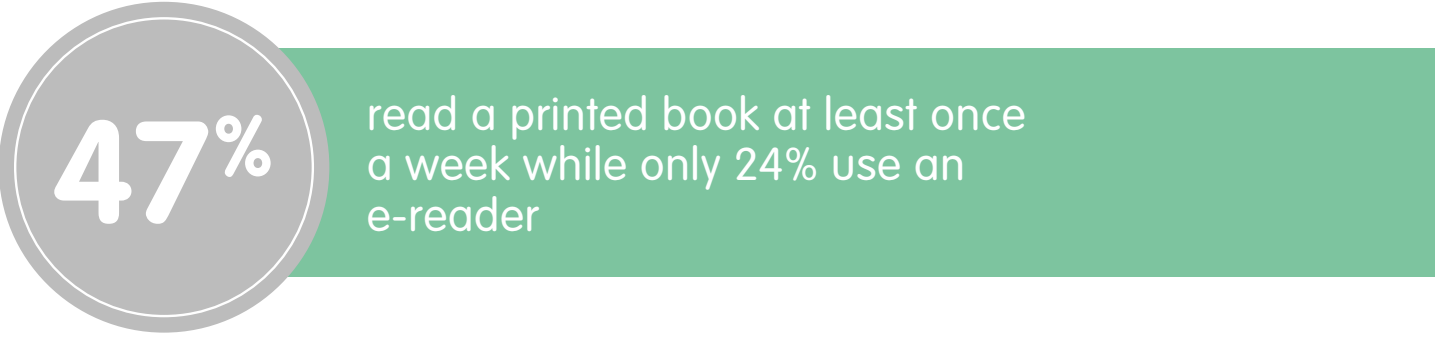


Always = every day

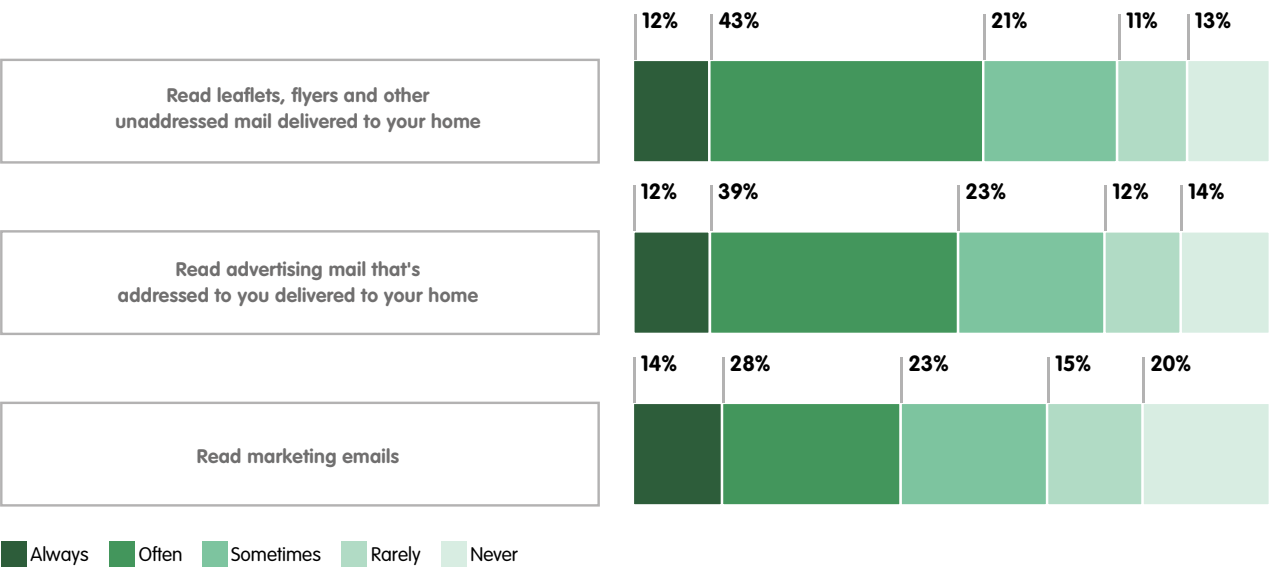
Often = once a week

Sometimes = once a month

Rarely = once a year



READERSHIP OF MARKETING AND ADVERTISING COMMUNICATIONS



FINDINGS AT A GLANCE

- 67% read news on a tablet, smartphone, laptop or desktop computer at least once a week
- 55% read a printed newspaper at least once a week
- 33% read a printed magazine at least once a week
- 24% read a digital magazine on a tablet, smartphone, laptop or desktop computer at least once a week
- 55% read leaflets, flyers and other unaddressed mail delivered to your home at least once a week
- 51% read advertising mail that’s addressed and delivered to your home at least once a week
- 42% read marketing emails at least once a week

The results show that respondents will read the printed version of books, magazines and advertising material more often than their digital equivalents. This information indicates that printed publications are frequently being read amongst Australians despite the rise and prevalence of digital media, which aligns with their preferences.

The largest variance in reading frequency occurs within books, where 47% will read a printed book at least once a week, compared to only 24% that will read an e-book.

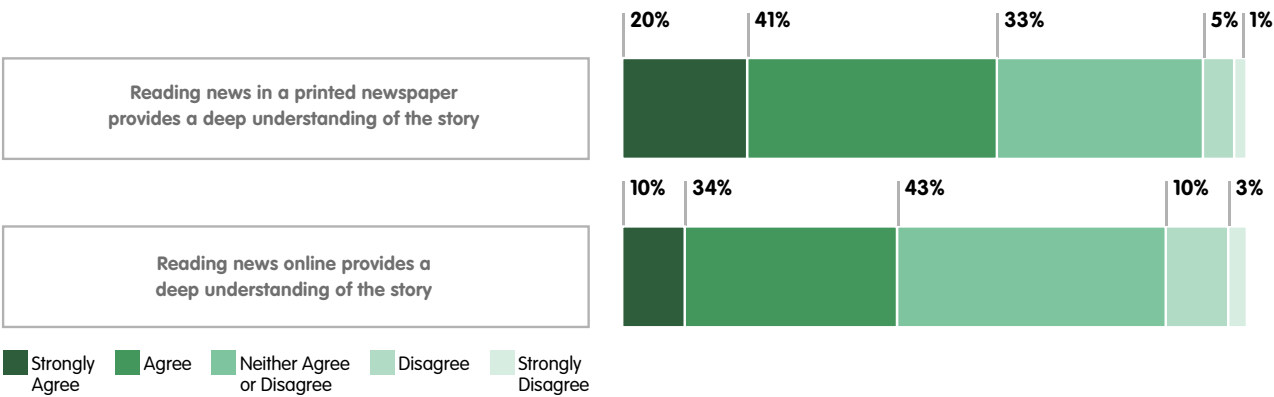
The data manifested differently for reading frequencies of news media, 67% of respondents read news on a digital device at least once a week, whereas 55% read it from a printed newspaper at least once a week. This data is not surprising as access to news content may be more easily achieved online.

In terms of reading frequency for advertising collateral, the tendency to consume information from printed leaflets, catalogues and other unaddressed mail (55%) as well as direct advertising mail (51%) is higher than marketing emails (42%).

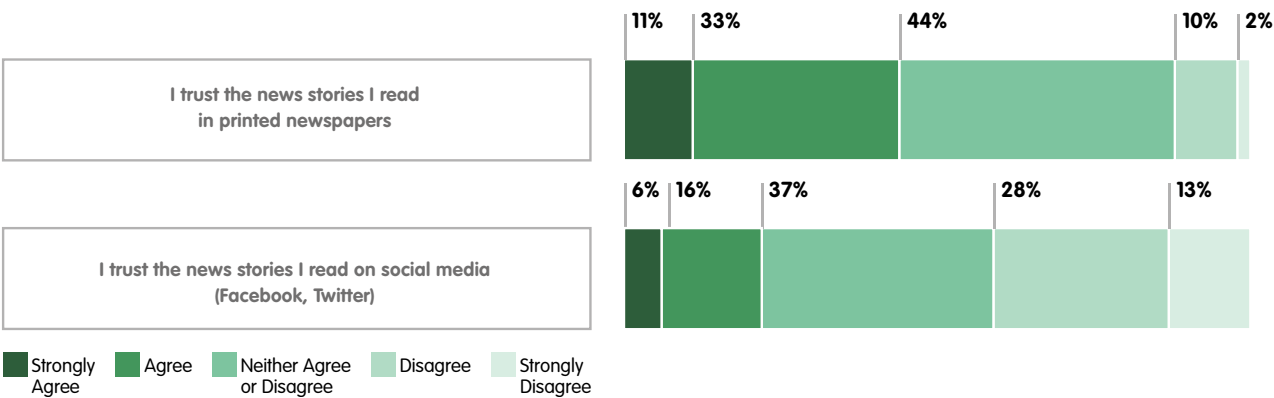
3. UNDERSTANDING, TRUST AND ATTITUDES TOWARD NEWS MEDIA

With the frequency of “fake news” appearing in the media, this question set out to find Australian’s views towards news media.

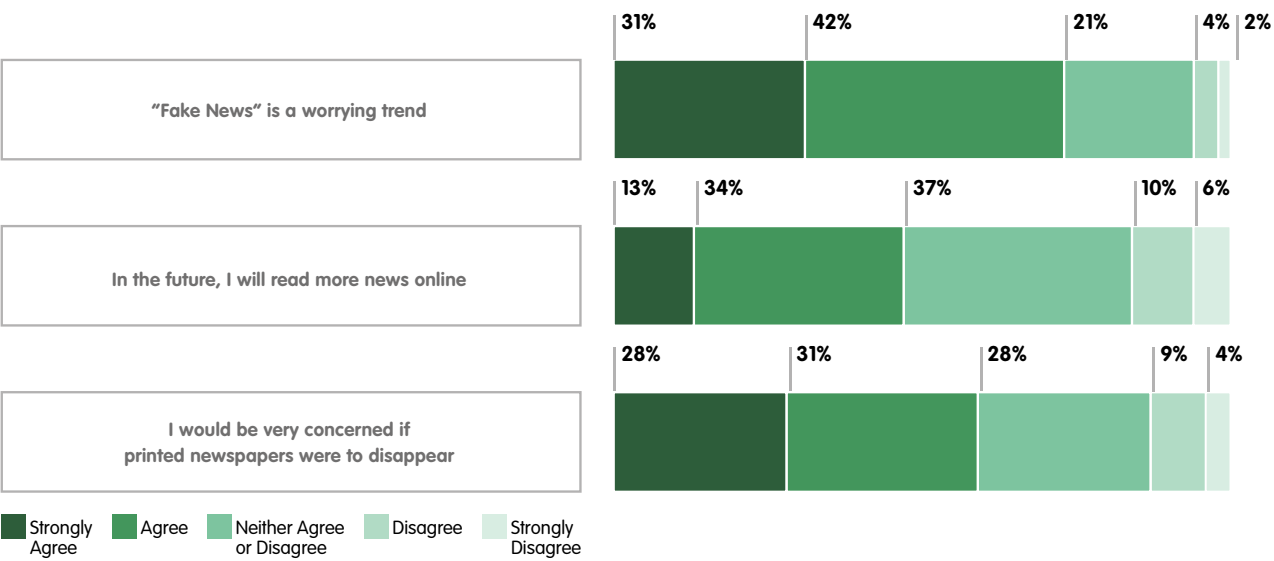
UNDERSTANDING GAINED FROM NEWS MEDIA



TRUST IN NEWS MEDIA



ATTITUDES TOWARD NEWS MEDIA



73% of Australians are concerned about the trend of “Fake News”

FINDINGS AT A GLANCE

- **61%** agreed that reading news in a printed newspaper provides a deep understanding of the story compared to 44% online
- **44%** agreed that they trust the news stories read in printed newspapers
- **22%** agreed that they trust the news stories read on social media (Facebook, Twitter)
- **73%** agreed that “Fake News” is a worrying trend
- **47%** agreed that in the future, they will read more news online
- **59%** agreed that they would be very concerned if printed newspapers were to disappear

These findings show that more Australians gain a deeper understanding of the story when read from print media (61%) over digital media (44%). On top of gaining a better understanding, Australians also trust the stories read in printed newspapers (44%) more than stories found on social media (22%), despite this 47% agreed they will read more news online in the future.

When breaking down the data into age groups, it is noteworthy that those in between 18-34 are generally more trusting in all forms of media compared to those in older age brackets, with those over the age of 55 being the least trusting in any form of media. Results also indicate that many (59%) would be very concerned if printed newspapers were to disappear. These findings seem to suggest print has a role in providing news media to Australians in a form that they both understand, trust and value.

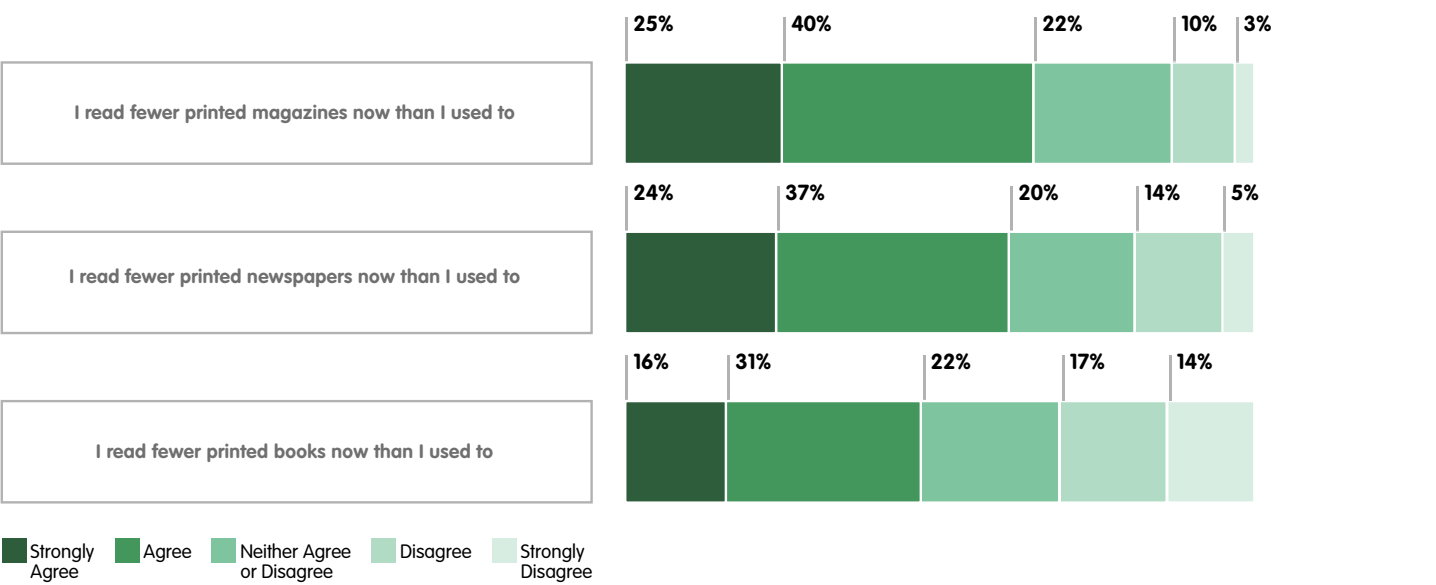
61%

gain a deeper understanding of the story when read from print media

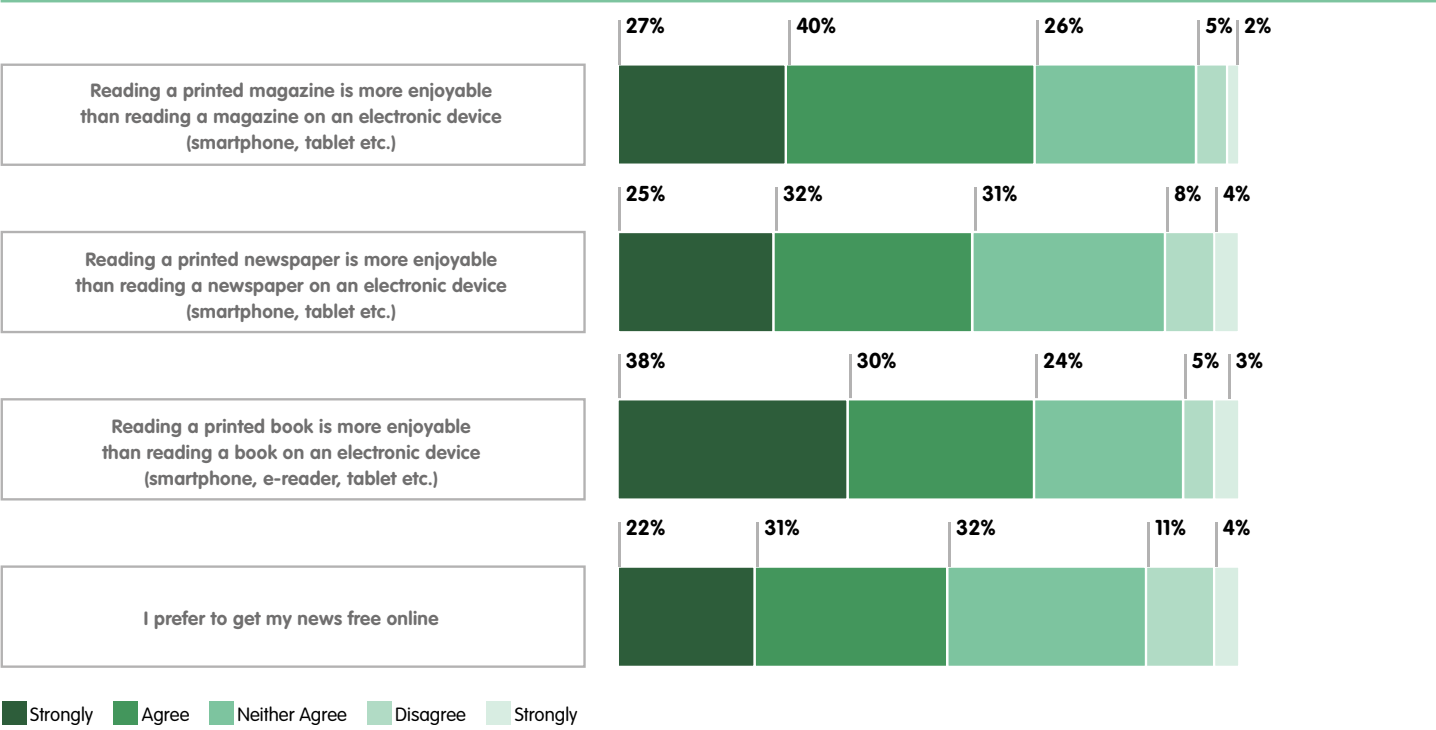
4. THE DIGITAL OVERLOAD?

With more and more content available online, this question aimed to find out how Australians are consuming information and their attitudes towards time spent online.

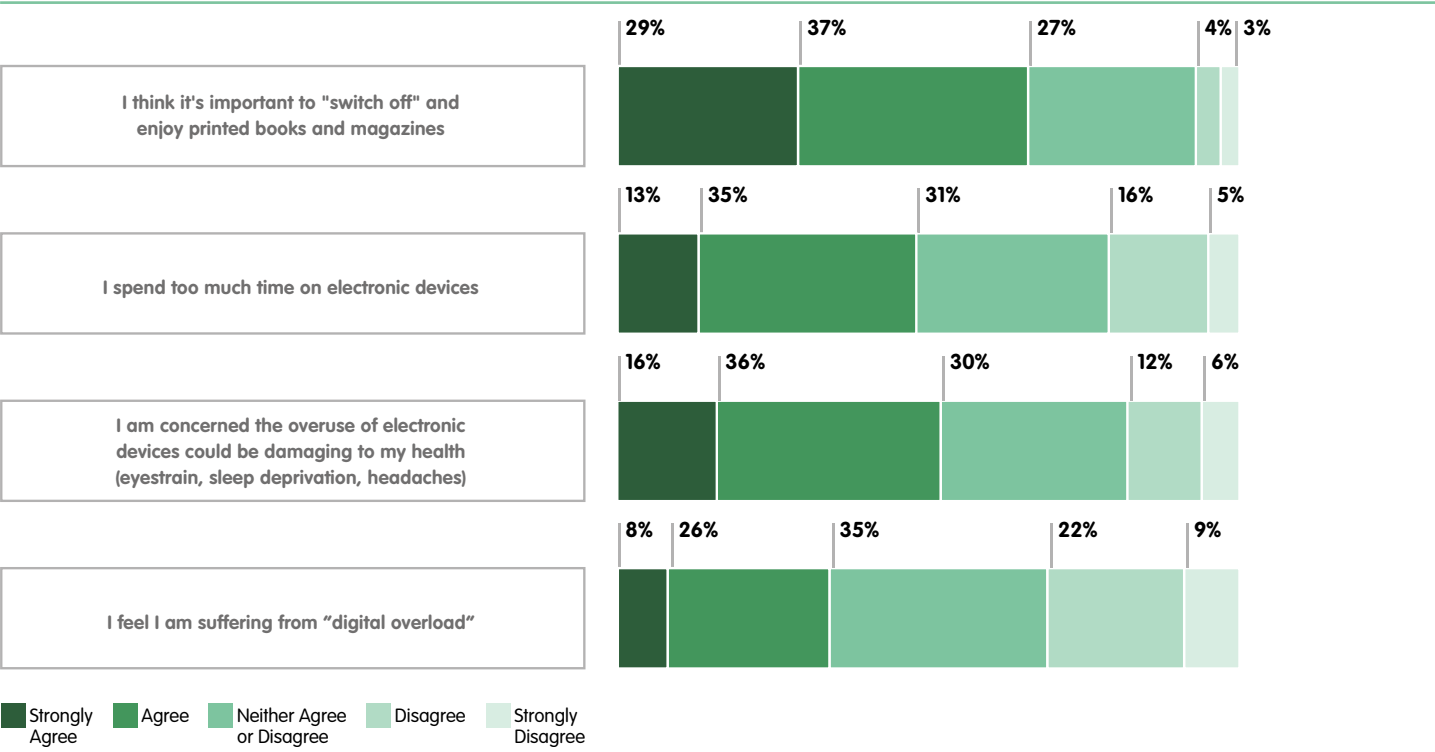
READING HABITS



READING ENJOYMENT



ATTITUDES TOWARDS TIME SPENT WITH DIGITAL DEVICES



FINDINGS AT A GLANCE

- **65%** agreed that they read fewer printed magazines now than they used to
- **61%** agreed that they read fewer printed newspapers now than they used to
- **47%** agreed that they read fewer printed books now than they used to
- **67%** agreed reading a printed magazine is more enjoyable than reading one on an electronic device
- **57%** agreed reading a printed newspaper is more enjoyable than reading one on an electronic device
- **68%** agreed reading a printed book is more enjoyable than reading one on an electronic device
- **53%** agreed that they prefer to get news free online
- **48%** agreed that they spend too much time on electronic devices
- **52%** agreed they are concerned the overuse of electronic devices could be damaging to health (eyestrain, sleep deprivation, headaches)
- **34%** agreed that they feel they are suffering from "digital overload"

66%

agreed that it's important to "switch off" and enjoy printed books and magazines

The results indicate that 53% of Australians prefer 'free' media, indicating a different news media consumption environment compared to 5-10 years ago.

The results also indicate that many Australians agree that they are reading fewer printed magazines (65%), newspapers (61%) and books (47%) than they used to, however many agree that reading a printed magazine (67%), newspaper (57%) or book (68%) is more enjoyable than reading their online equivalents.

These lower levels of reading books, magazines and newspapers in print are not surprising as 48% of respondents agreed that they spend too much time on electronic devices.

This time spent with online devices is proving a cause for concern, with 52% agreeing that they are concerned the overuse of electronic devices could be damaging to health (eyestrain, sleep deprivation, headaches) and 34% agreeing they feel they are suffering from "digital overload".

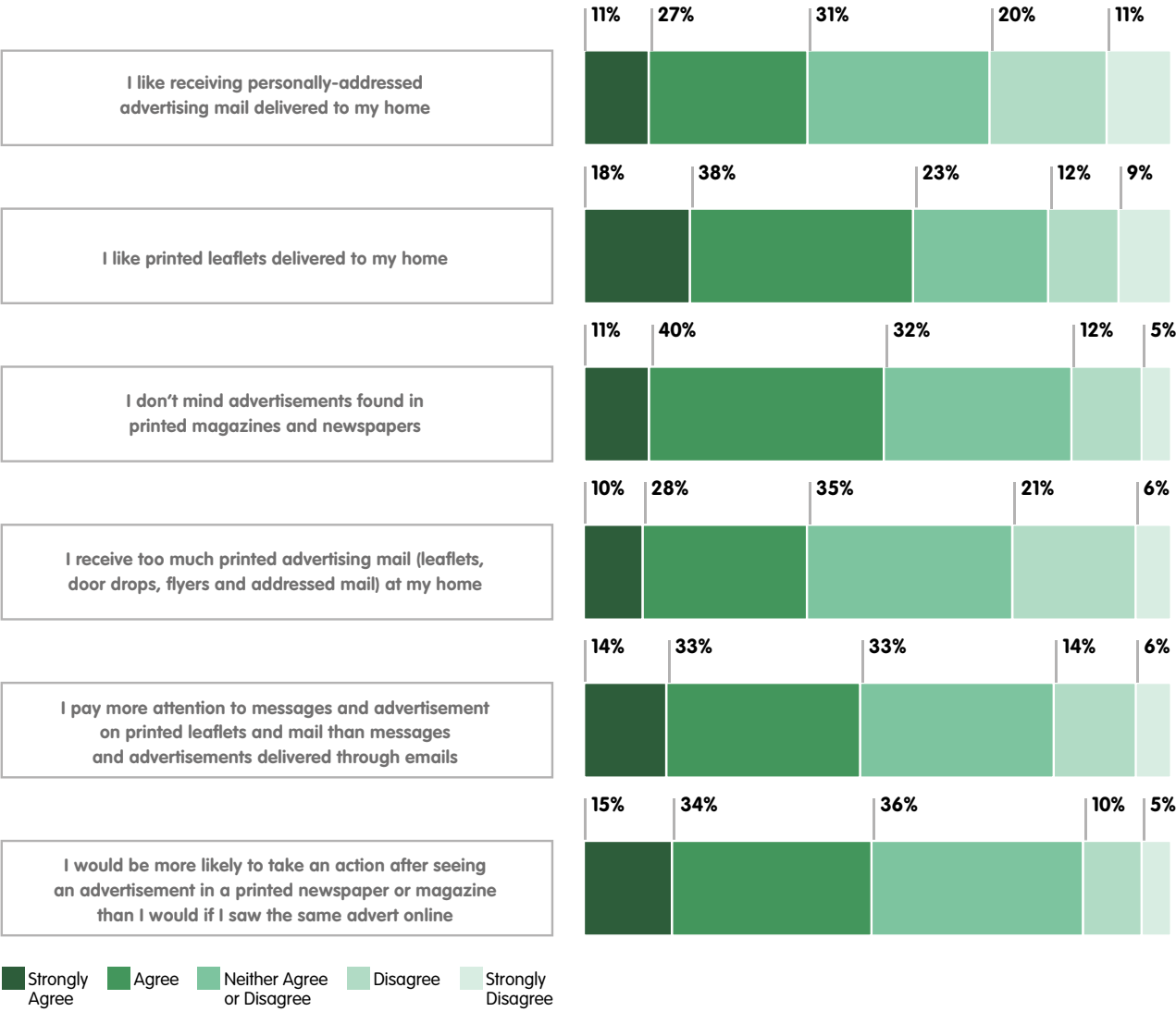
To combat this "digital overload" 66% agreed that it's important to "switch off" and enjoy printed books and magazines.

*Electronic device refers to smartphone, e-reader, tablet

5. ATTITUDES TOWARDS ADVERTISING AND MARKETING COMMUNICATIONS

With a large percentage of marketing budgets invested in digital advertising, this question aimed to find out Australians view towards advertising and marketing communication channels.

ATTITUDES TOWARDS PRINT ADVERTISING AND MARKETING COMMUNICATIONS



FINDINGS AT A GLANCE

- **38%** agreed they like receiving personally-addressed advertising mail delivered to their home
- **56%** agreed they like printed leaflets delivered to their home
- **51%** agreed they don't mind advertisements found in printed magazines and newspapers
- **38%** agreed they receive too much printed advertising mail (leaflets, letter box, catalogues and addressed mail) at home
- **47%** agreed they pay more attention to messages and advertisements on printed leaflets and mail than messages and advertisements delivered through emails
- **49%** agreed they 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 advert online

ATTITUDES TOWARDS ONLINE ADVERTISING AND MARKETING COMMUNICATIONS



FINDINGS AT A GLANCE

- **72%** agreed they don't pay attention to most advertisements online
- **60%** agreed they do not trust many of the advertisements they see online
- **62%** agreed they do their best to block or avoid online advertisements
- **66%** agreed they can't remember the last time they willingly clicked an online advertisement

The results indicate that on average, almost 50% of Australians agreed that they like receiving personally-addressed advertising mail and printed leaflets delivered to their home and don't mind advertisements found in magazines and newspapers. In addition to this, 46% agreed that they pay more attention to messages and advertisements in print than those delivered via emails.

Consumers also stated they receive too many advertising messages, with 38% agreeing they receive too much printed advertising mail (leaflets, letterbox, catalogues and addressed mail). Although, when compared directly to receiving digital advertising, almost twice as many (67%) agreed that they find online advertisements annoying and usually not relevant.

Additionally, many Australians don't pay attention to (72%) or trust (60%) online advertisements and 62% do their best to avoid them. With 66% agreeing that they can't remember the last time they willingly clicked an online advertisement. Comparatively, 49% agreed they 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 advert online.

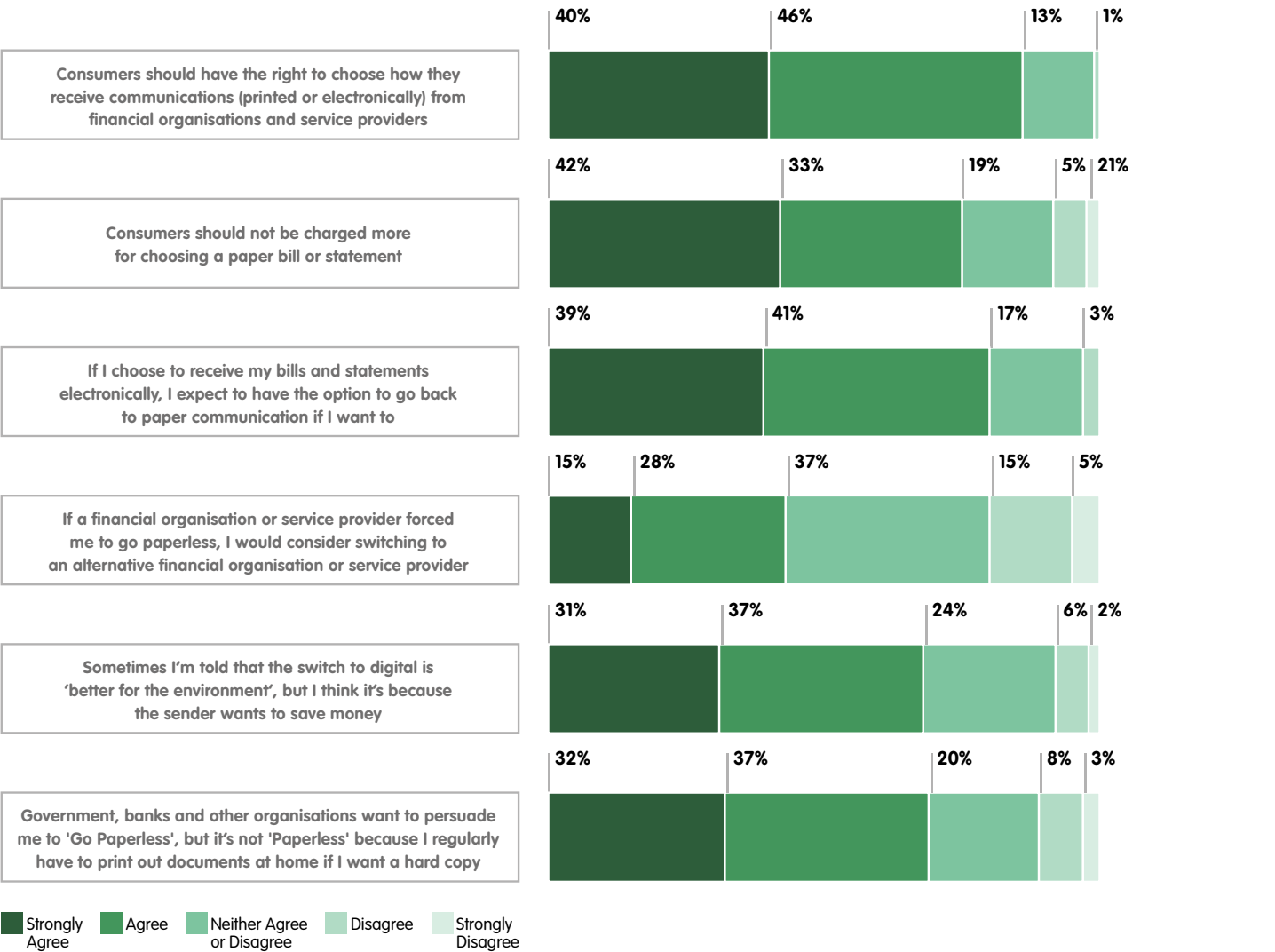
When examining the attitudes towards print and digital advertising and marketing communications, the data indicates that Australians respond to print marketing and advertising, with online marketing and advertising relatively unpopular with most Australians.



6.THE DRIVE TO DIGITAL

With many service providers pushing to digital communications, statements and bills, this question aimed to find out how Australians view this and how they want to be communicated to by service providers.

ATTITUDES TOWARDS THE DRIVE TO DIGITAL



FINDINGS AT A GLANCE

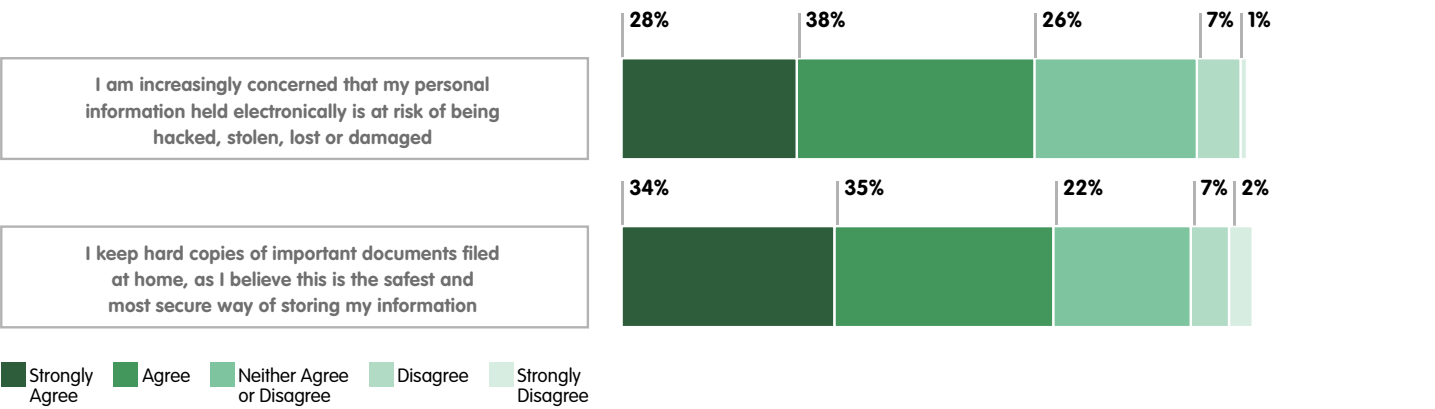
- **75%** agreed consumers should not be charged more for choosing a paper bill or statement
- **80%** agreed that if they choose to receive bills and statements electronically, they expect to have the option to go back to paper communications if they want to
- **43%** agreed that if a financial organisation or service provider forced them to go paperless, they would consider switching to an alternative financial organisation or service provider
- **68%** agreed that sometimes when they are told that the switch to digital is 'better for the environment', they think it is because the sender wants to save money

86%

agreed consumers should have the right to choose how they receive communications (printed or electronically) from financial organisations and service providers

- **69%** agreed government, banks and other organisations want to persuade me to 'Go Paperless', but it's not 'Paperless' because I regularly have to print out documents at home if I want a hard copy

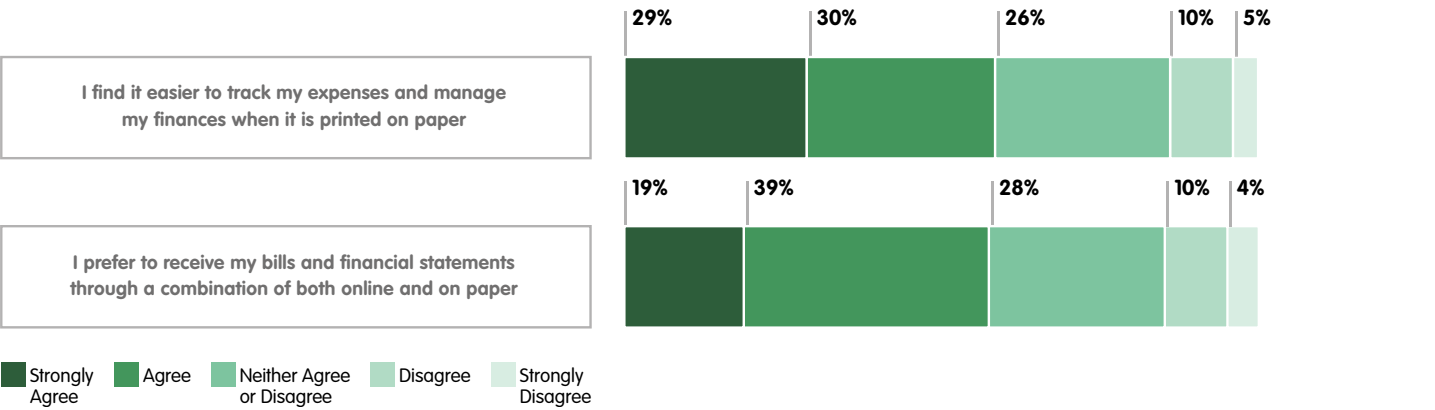
SECURITY AND PRIVACY



FINDINGS AT A GLANCE

- **66%** agreed that they are increasingly concerned that their personal information held electronically is at risk of being hacked, stolen, lost or damaged
- **69%** agreed that they keep hard copies of important documents filed at home, as they believe this is the safest and most secure way of storing information

PREFERENCES FOR MANAGING FINANCES



FINDINGS AT A GLANCE

- **59%** agreed that they find it easier to track my expenses and manage my finances when it is printed on paper
- **58%** agreed they prefer to receive bills and financial statements through a combination of both online and on paper

86% of Australians believe that consumers should have the right to choose how they receive communications (printed or electronically), from service providers. Many consumers (80%) would like the option for paper communications, and 69% agree that even if companies aren't mailing the documents, they will print documents at home because they find it easier to track and manage finances in paper.

Findings also indicate trust and privacy concerns with personal information being held electronically, 69% of Australians believe that keeping hard copies at home is a safe and more secure way of storing information.

Consumers remain critical of companies claiming to reduce their impact on the environment by reducing paper statements, with 68% agreeing companies are wanting to instead save money. This finding is lower but still consistent with results from the 2016 Toluna survey that reported 83% agreed companies were seeking to save costs. As the topical climate change agenda has shifted focus (73% of companies contacted by Two Sides have removed greenwashing claims) the consumer focus may have softened.

Findings are also consistent with the 2016 Toluna survey regarding switching service providers if forced to go paperless which reported that 43% of respondents agreed they would do so. The 2017 survey indicates that consumers have maintained the same beliefs with 44% claiming they would consider switching service providers.



CONCLUSION

Findings indicate that consumers have a preference to read from paper than from screens in a variety of different circumstances from reading for leisure to reading marketing messages. Many Australians also indicated that they may be experiencing digital fatigue and agreed that paper and print provides a great way to “switch off”.

Paper and print proved to be a trusted source of information that gives readers a deeper understanding of the story compared to their digital equivalents. These findings highlight the value of paper and print to consumers and organisations should consider print to assist in developing consumer trust and connection.

In terms of reading frequency for marketing and advertising collateral, the tendency to consume information from printed leaflets, catalogues and other unaddressed mail as well as direct advertising mail was reported higher than marketing emails. Further, online marketing and advertising proved relatively unpopular with most Australians. These results highlight the influential role that print marketing collateral plays in consumer engagement.

Findings also indicate trust and privacy concerns with personal information being held electronically, with more than two thirds of Australians believing that keeping hard copies at home is a safe and more secure way of storing information. Consumers are also wary of fake news, with a majority stating their concern regarding this trend.

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.

Print and Paper
have a great
environmental
story to tell



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