



# The Evolution of Print in the Cross-Generational World of Information Media

Presented to:

## ING Leadership Conference

September 29, 2018  
Chicago, IL

Association for  
**PRINT**  
Technologies

# Mining for *Acres of Diamonds*



**“What I would like to invite you to do by the end of this talk is explore where you are today, for two reasons.**

**One:** so that you can contribute more.

**Two:** that hopefully we can not just understand other people more, but appreciate them more, and create the kinds of connections that can stop some of the challenges that we face today. They're only going to get magnified by the very technology that connects us, because it's making us intersect.”

*Tony Robbins Ted Talk 2006*





## About APTech<sup>SM</sup>

The Association for PRINT Technologies (APTech<sup>SM</sup>) (formerly known as NPES), is the purpose-driven organization dedicated to supporting the entire commercial printing value chain.

APTech's signature event — PRINT<sup>®</sup> — answers the call by bringing the boldest and brightest innovators, influencers, and newest technology together to create connections that showcase and advance our industry.

**APTech makes available to its members a wide range of services including:**

- Industry Market Data & Research
- Global Business Development
- Education Programs
- Events that Convene the Industry
- Government Affairs Representation
- Safety and Technical Standards Development



# About PRIMIR

PRIMIR (Print Industries Market Information and Research Organization) is the research unit of the Association for PRINT Technologies.

## Unmatched Research Value

PRIMIR annually produces nearly \$500,000 in timely research studies.

## Membership

Membership is open to manufacturers, suppliers, printers, converters or brand owners engaged in printing or converting by any and all processes, within the United States or globally, or in the manufacture or distribution of equipment, software, materials or supplies to the graphic communications or converting industry

## Meetings/Education/Networking

The PRIMIR Insights Conference offers an opportunity to network with peers who are interested.

## Resources

APTech and PRIMIR members receive new studies as they are published.

For more information about PRIMIR, please contact Rekha Ratnam, Senior Director, PRIMIR Market Research at [rratnam@aptech.org](mailto:rratnam@aptech.org).

# Credits

## The Evolution of Print in the Cross-Generational World of Information Media

### APTech – PRIMIR Research Unit

Co Chairs:

Paul Jaynes, Comprehensive Marketing Results [pauljaynes@gmail.com](mailto:pauljaynes@gmail.com)

Steve Mattingly Southern Lithoplate, Inc. [smattingly@slp.com](mailto:smattingly@slp.com)

**Study conducted by:**

### Borrell Associates

Gordon Borrell [gborrell@borrellassociates.com](mailto:gborrell@borrellassociates.com)

Kip Cassino [cassino@borrellassociates.com](mailto:cassino@borrellassociates.com)

**For the full study, contact:**

Rekha Ratnam [rratnam@aptech.org](mailto:rratnam@aptech.org)

© 2018 Association for PRINT Technologies

## Steve Mattingly

*Senior Vice President*

*Southern Lithoplate*

*smattingly@slp.com*

- APTEch Board Member
- PRIMIR Executive Committee Member
- Past studies as task force member

*\* Active Co-Chair*

2000 The Future Markets for Prepress Equipment and Systems in the US: 2000-2005

2007 Life Cycle of the Analog and Digital Lithographic Printing Plate - 2007 Update

2008 The Future of the North American Newspaper Industry

2011\*\* Economic Indicators for Print

2016\*\* The Future of Print in the US – Landscape, Implications, and Opportunities

2017 Worldwide Market for Print 2.0: Global Opportunities in Publishing Printing and Marketing & Commercial Printing (2012-2021)

2017\* Worldwide Printing Industry Consumables, Inks and Substrates Usage and Trends

2017 Service to U.S. Printers: Trends and Outlook

2018\*\* The Evolution of Print in the Cross-Generational World of Information Media

## Paul Jaynes

*Comprehensive Marketing Results*

*pauljaynes@gmail.com*

PRIMIR Task Force

*\* Active Co-Chair*

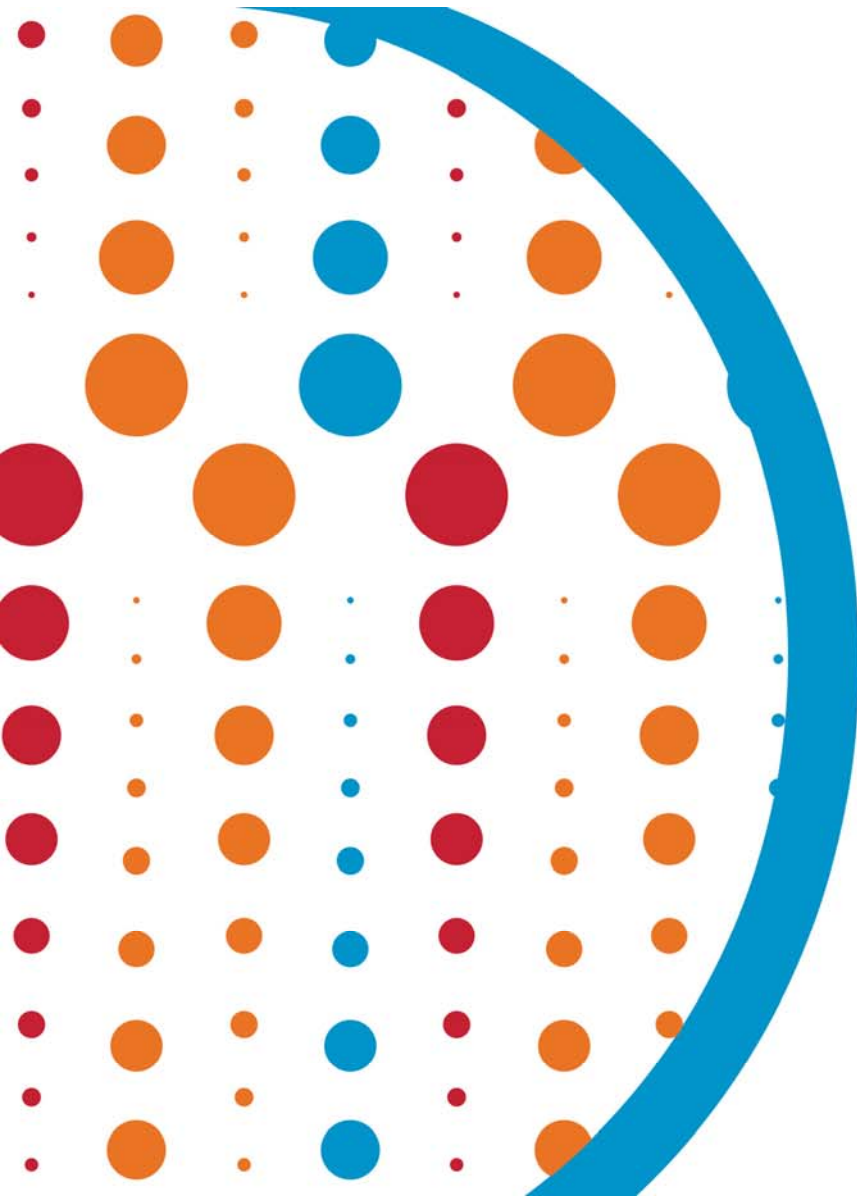
# Gordon Borrell

*Chief Executive Office*

*Borrell & Associates*

*gborrell@borrellassociates.com*

- Chairman of the Local Media Association
- Past president of the Newspaper Association of America's New Media Federation
- Borrell Associates provides consulting services to help companies understand and capitalize on the evolving media landscape
- Assists companies in growing their revenues exponentially rather than incrementally
- Generates and publishes industry-related advertising reports
- Provides revenue benchmarking for local online operations
- Works with more than 700 media properties, Internet "pure-play" companies, investment analysts, and industry vendors
- Employs staff and analysts with broad experience in media management, retail and local advertising



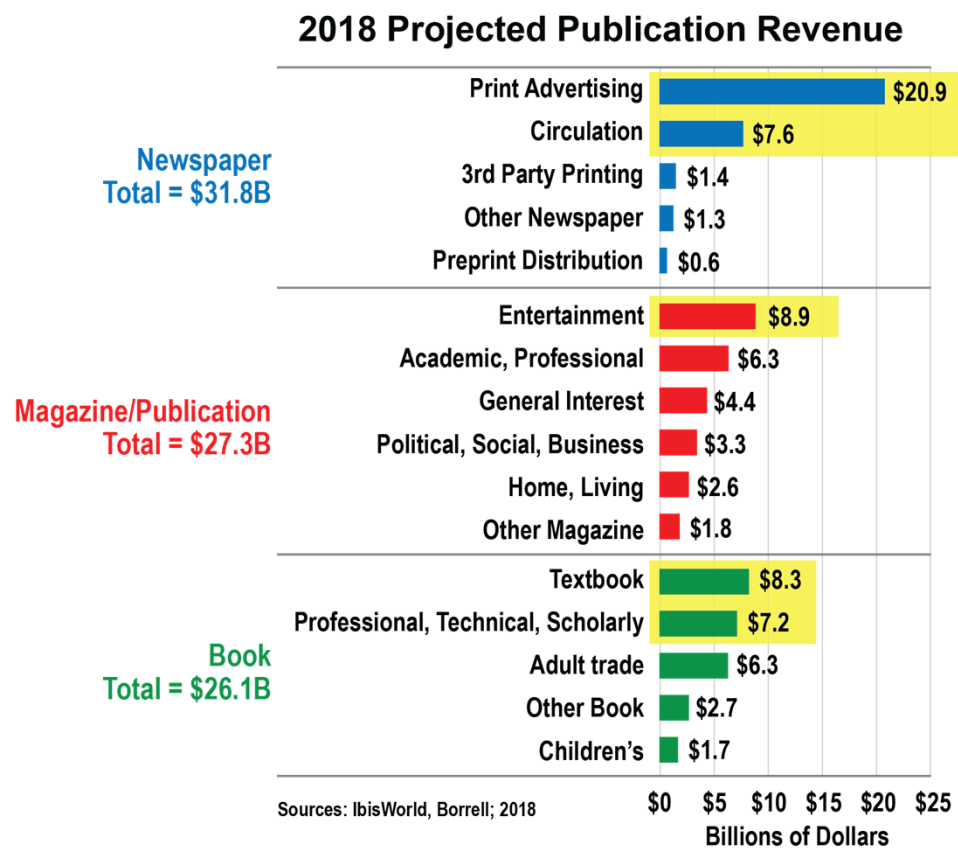
# The Current and Future State of the U.S. Information Media Landscape and its Consumer's Generational Habits and Patterns

## Key Forms News & Information Media

- **Print**
- Radio
- Television
- Internet
- Mobile Communication



# Print's Current Standing *(Projected 2018 Revenue)*



# Consumers of Information

## Majority Segments

- **Millennials** – most influence on info media
  - Youngest, largest group
  - Most educated
  - First digitally native
  - Constantly connected
- **Gen Xers** – impacted by Millennials influence on media
- **Baby Boomers** – impacted by Millennials influence on media

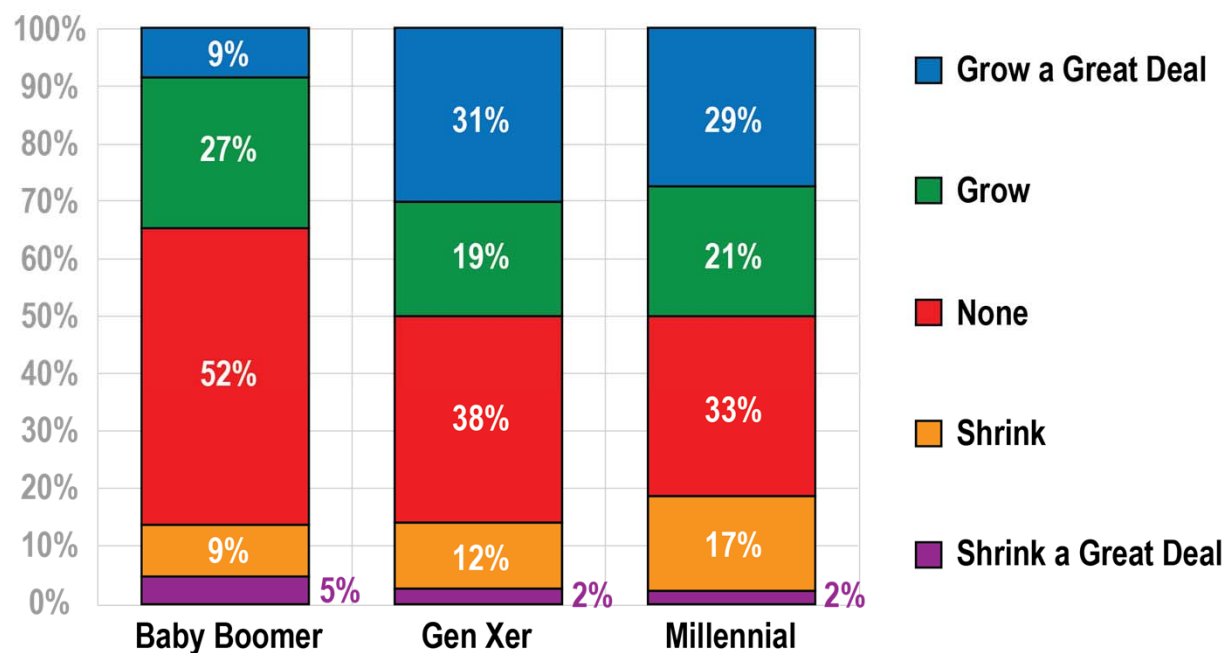
# Demographics

1920's	1930's	1940's	1950's	1960's	1970's	1980's	1990's	2000's	2010's
Silent Generation 1928 - 1945 73 - 90 Years Old			Baby Boomer 1946 - 1964 54 - 72 Years Old		Generation X 1965 - 1979 39 - 53 Years Old	Millennial 1980 - 1994 24 - 38 Years Old		Generation Z 1995 - 2012 6 - 23 Years Old	

## In 10 Years – 2028

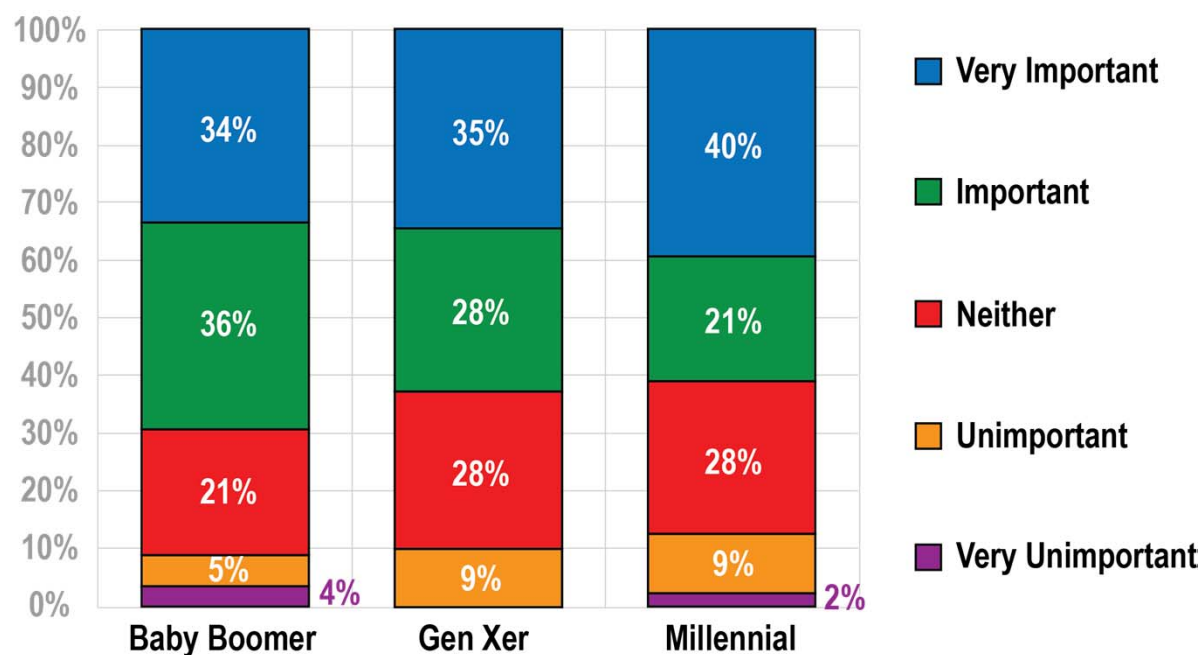
- The youngest Baby Boomer will be 64
- The oldest Baby Boomer will be 82
- Millennials will be 34 to 48

## Growth of News & Information in Next 5 Years



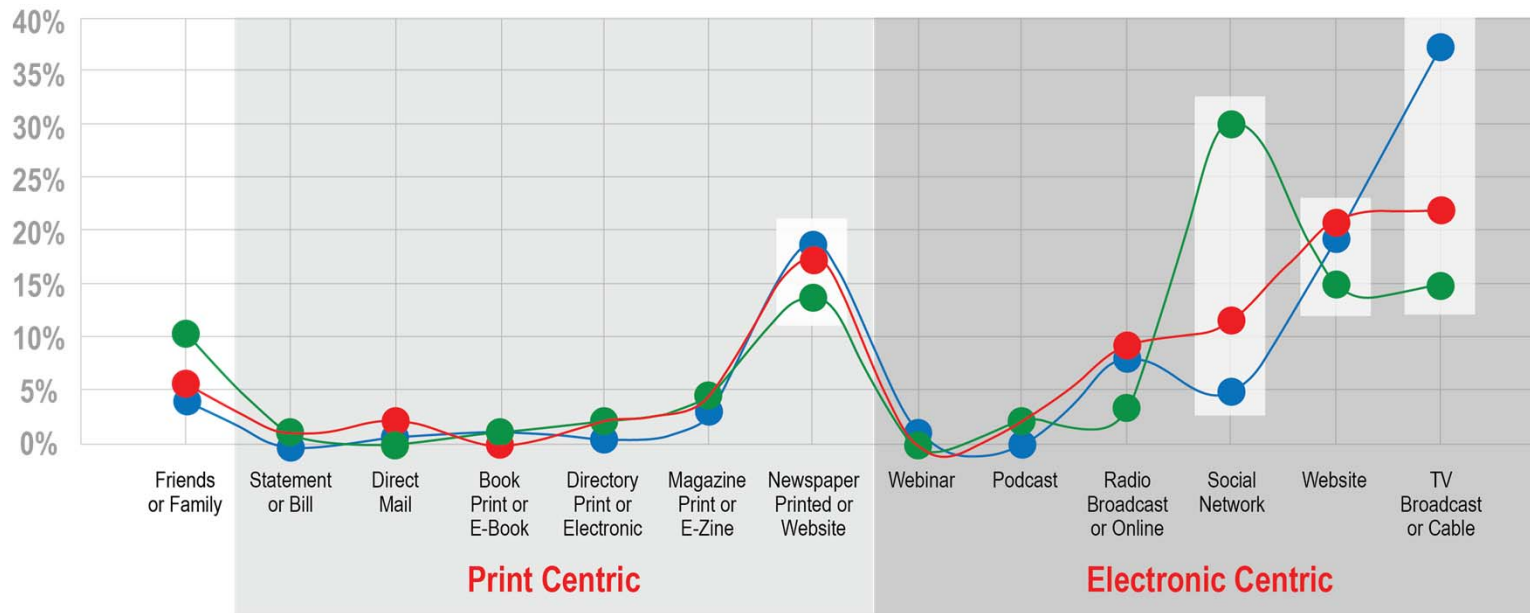
Q: During the next five years, do you believe your need for news and information will shrink, stay the same or grow?

## Importance of News & Information in Daily Life



Q: Rate the importance of news and information to your daily life.

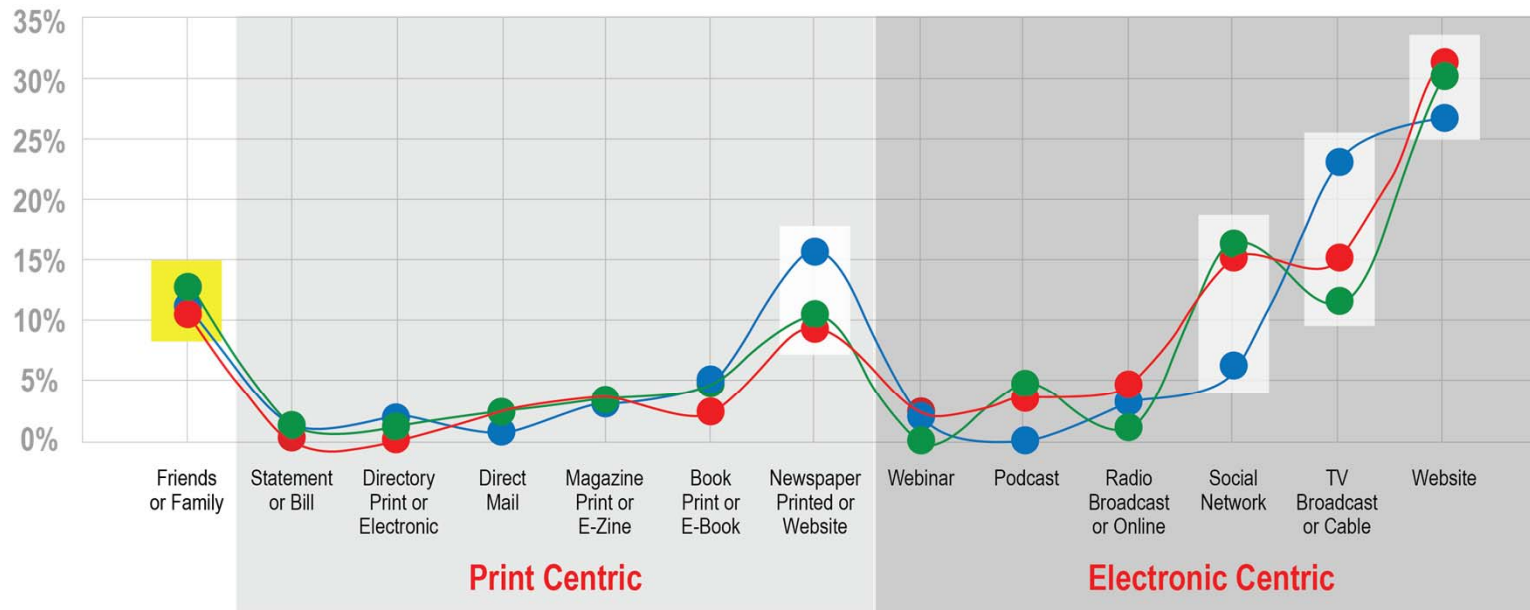
## Top News Source



Q: What are your top 2 sources for news about current events?

- Baby Boomer
- Gen Xer
- Millennial

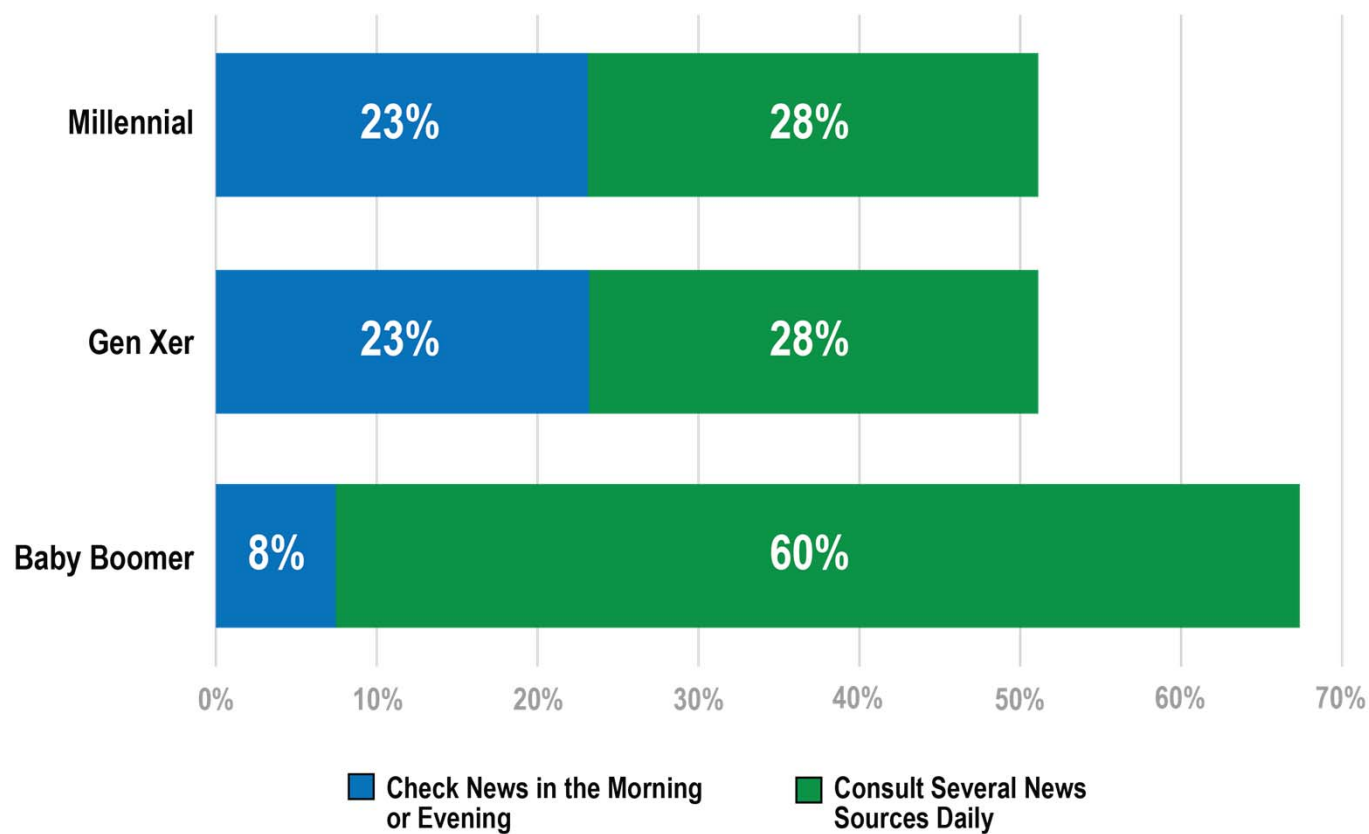
## Top Information Source



Q: What are your top 2 sources for information to answer questions or resolve uncertainty?

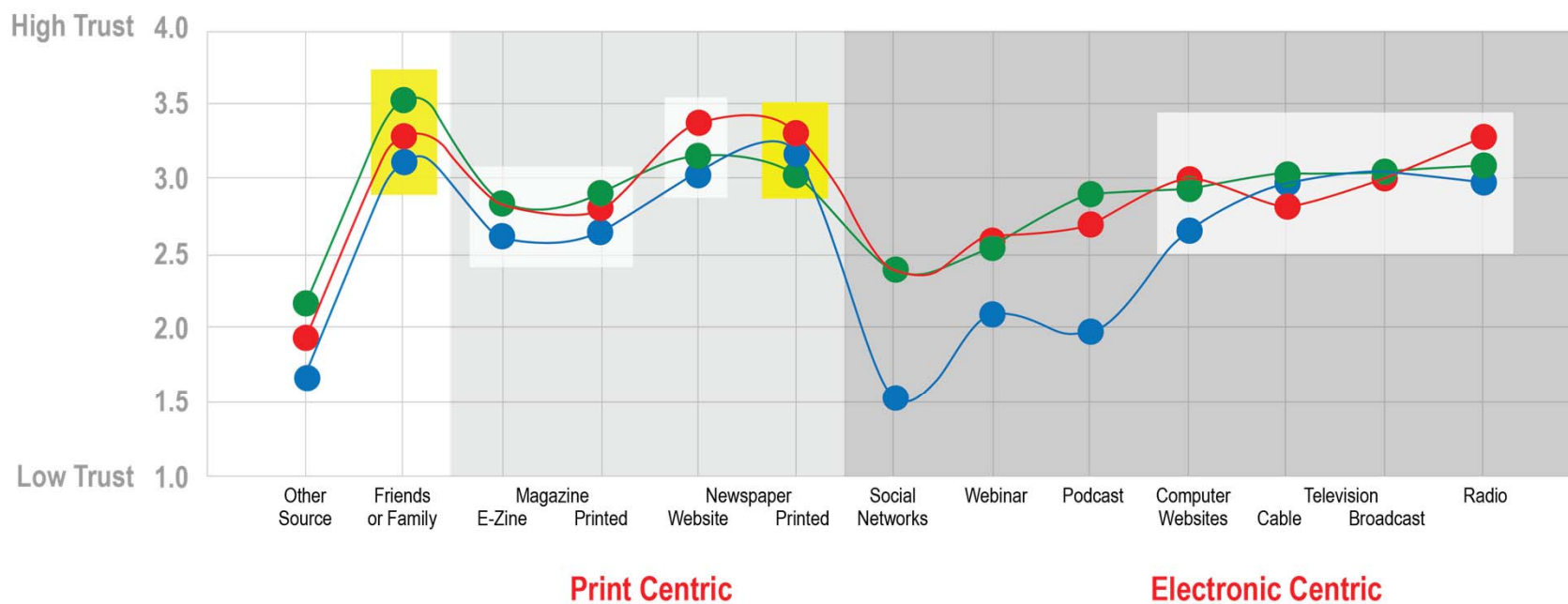
- Baby Boomer
- Gen Xer
- Millennial

## Source of News & Information by Generational Group





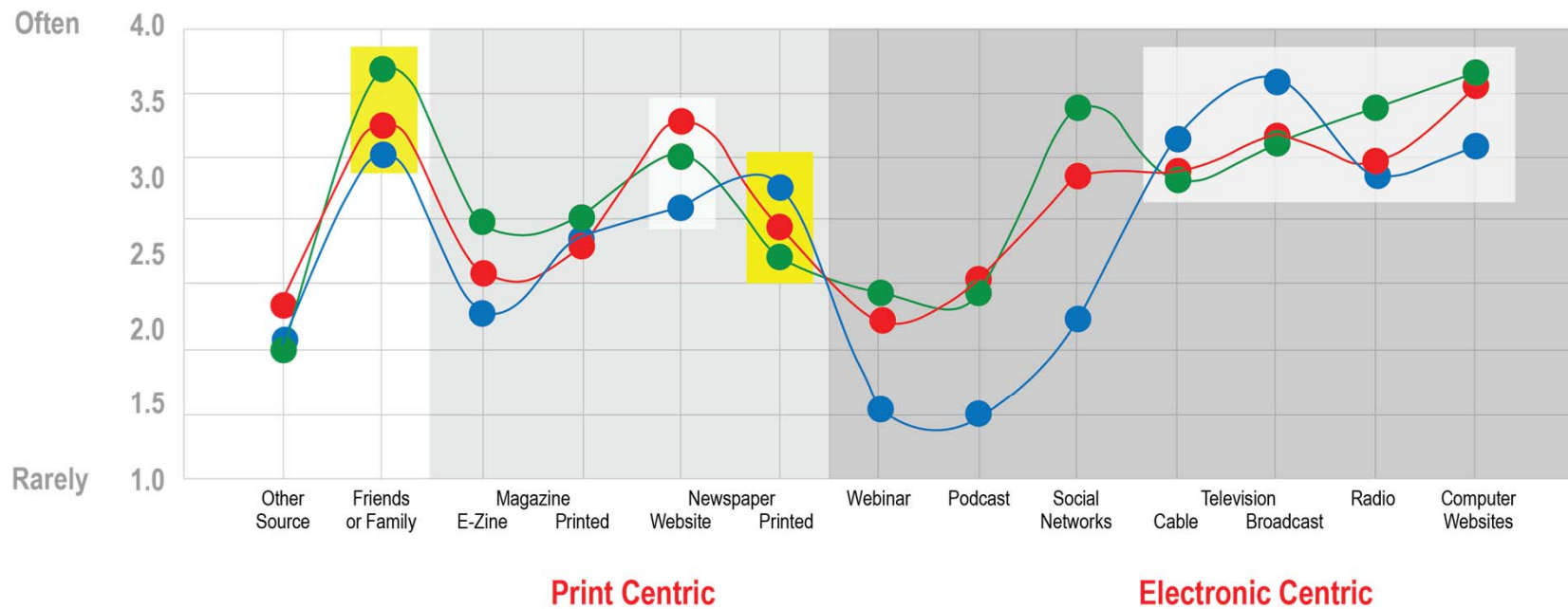
## Most Trusted News & Information Sources



Q: Rank these sources of news and information according to your level of trust in each. (Scale: 0 = No trust at all. 5 = Highly trusted.)

- Baby Boomer
- Gen Xer
- Millennial

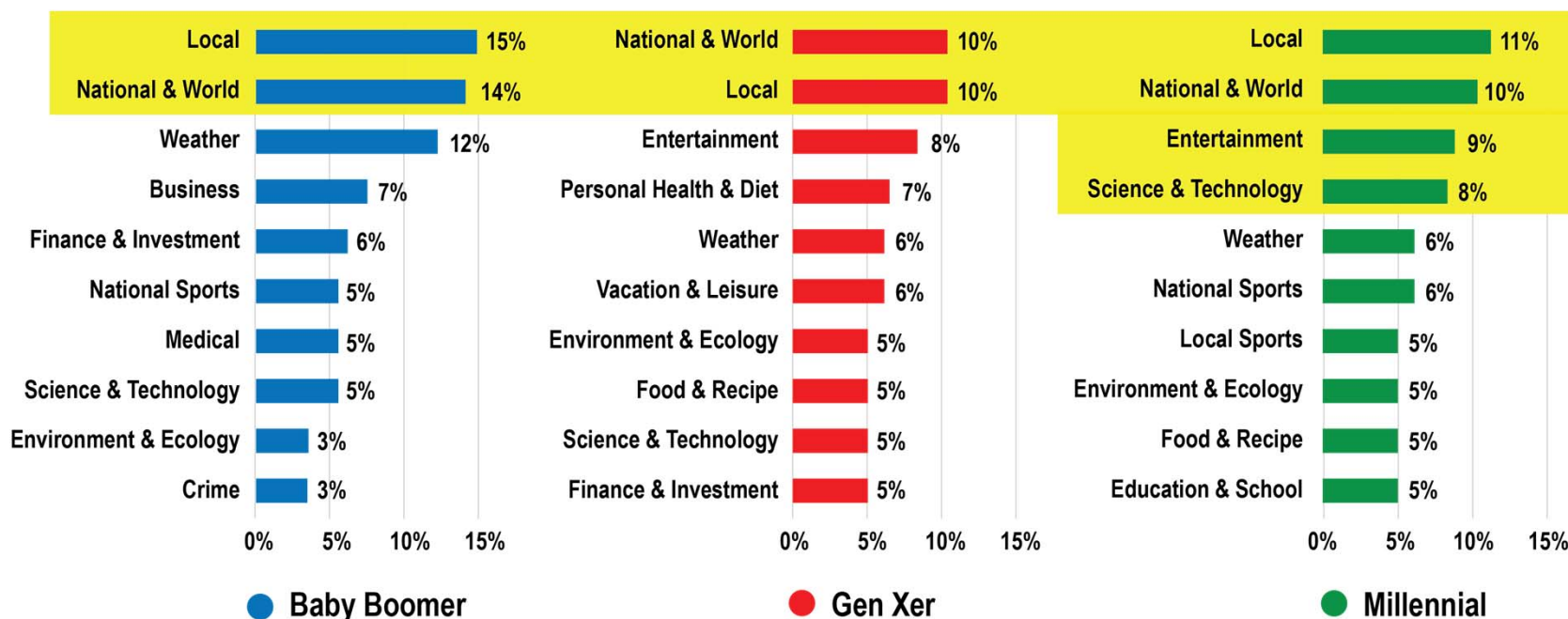
## Most Used News & Information Sources



Q: Rank these sources of news and information according to how often you actually use each. (Scale: 0 = Never. 5 = Very often.)

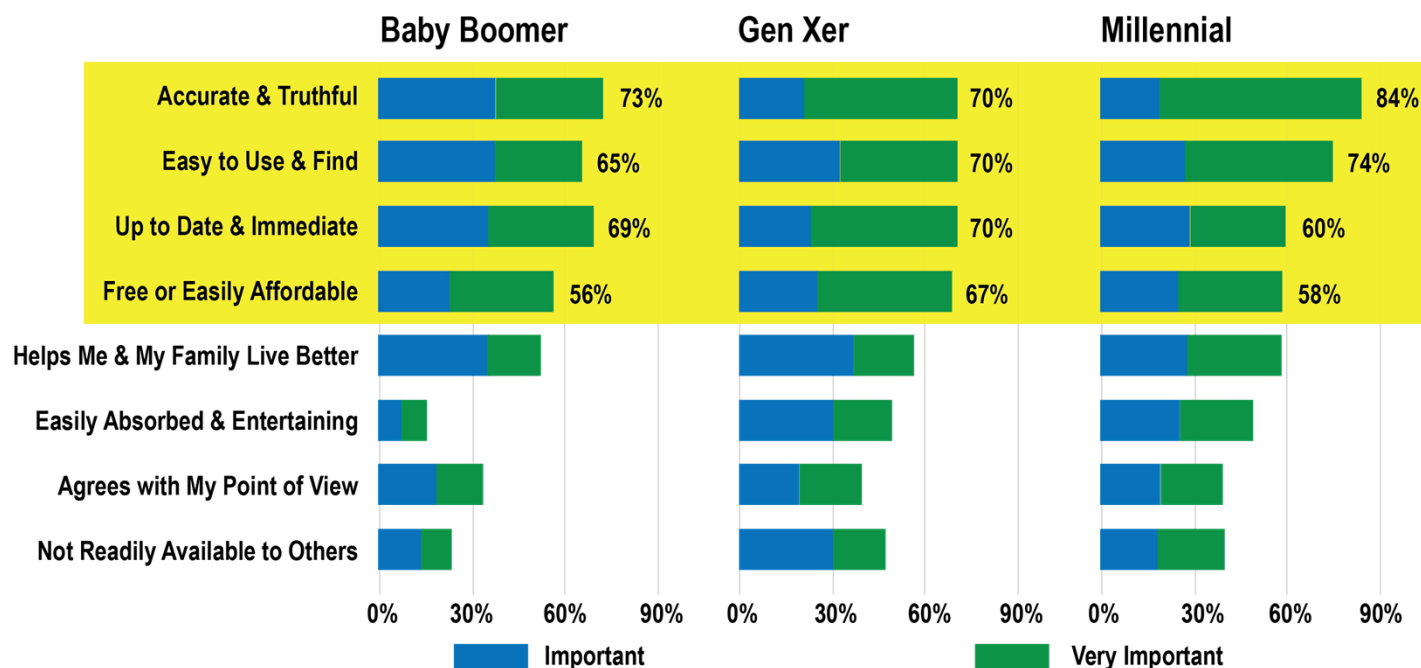
- Baby Boomer
- Gen Xer
- Millennial

# Ten Most Interested News & Information Categories



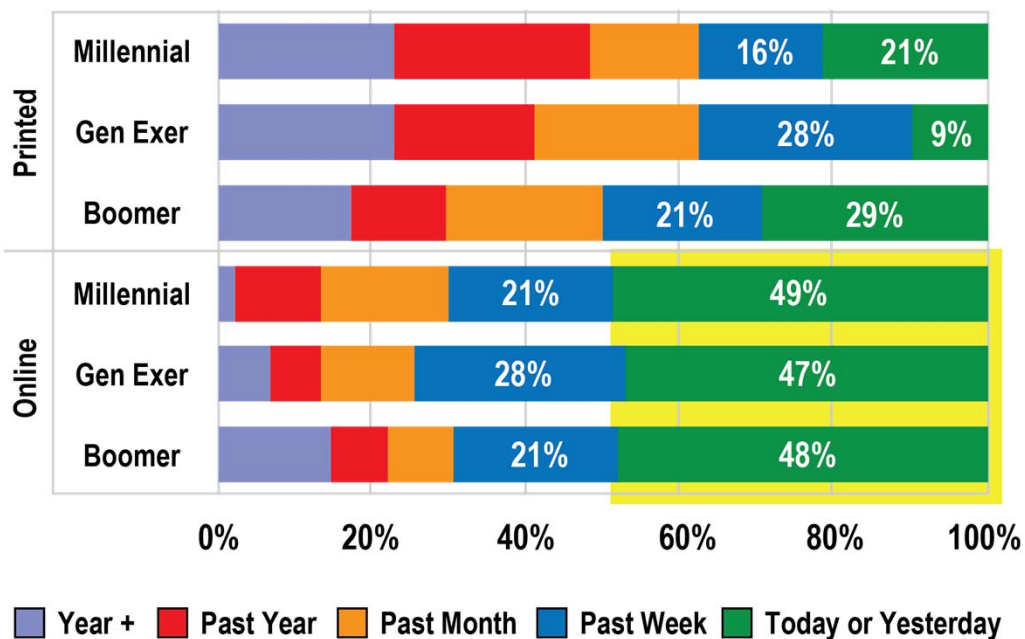
Q: Among the categories of news and information pick those that interest you the most.

# Most Important Reasons for Using News & Information Sources



Q: Thinking of the news and information sources you use most, what are the most important reasons you use them?

# Newspaper Readership

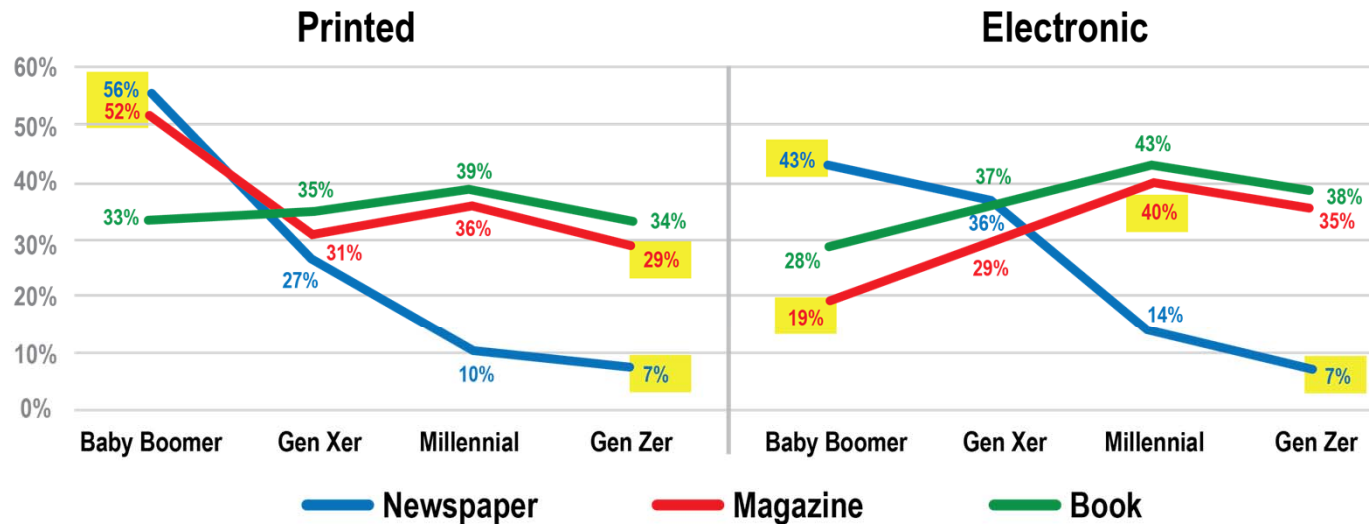


Q: When was the last time you read a newspaper?

**Note:** Almost half of all three generations read an online newspaper every day or two and 70-75% of them read online at least weekly.

**Note:** 37% of Millennials read a printed newspaper within the past week.

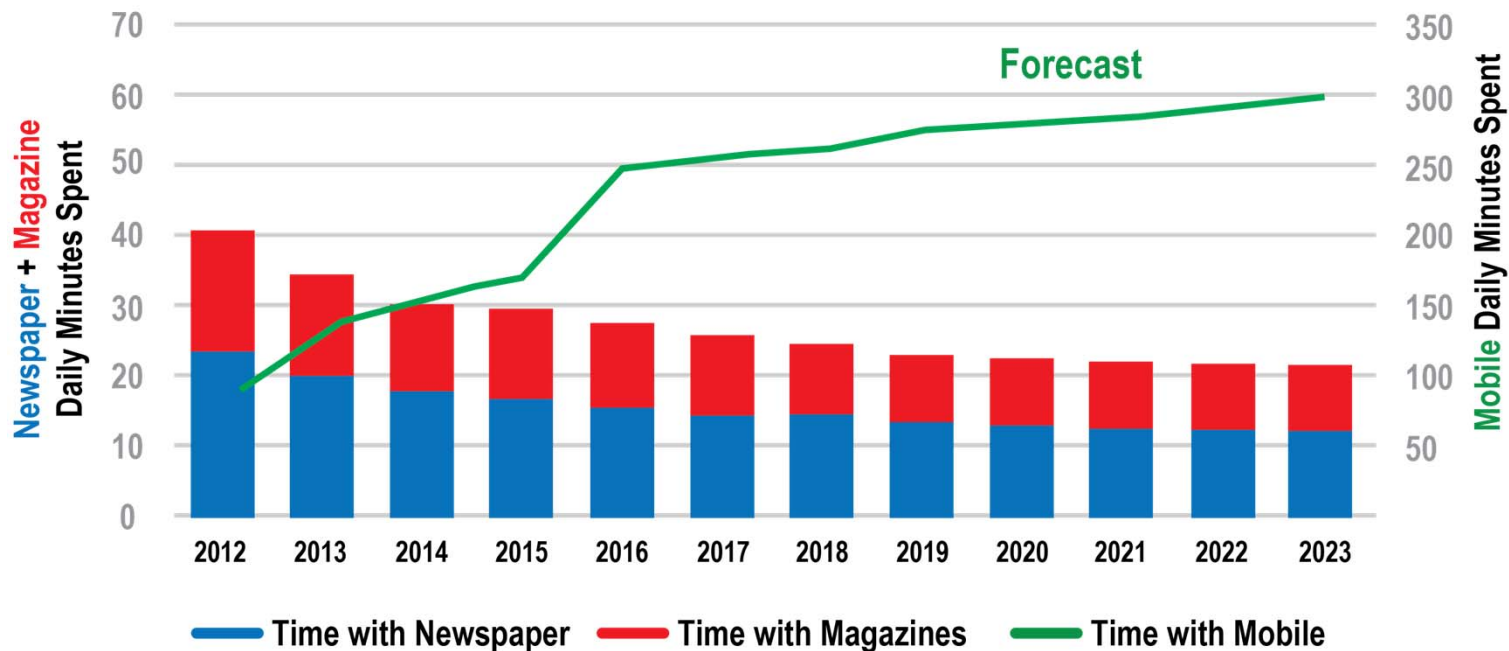
# Generational Readership Distribution



Sources: Nielson-Scarborough, PIB, Borrelli; 2018

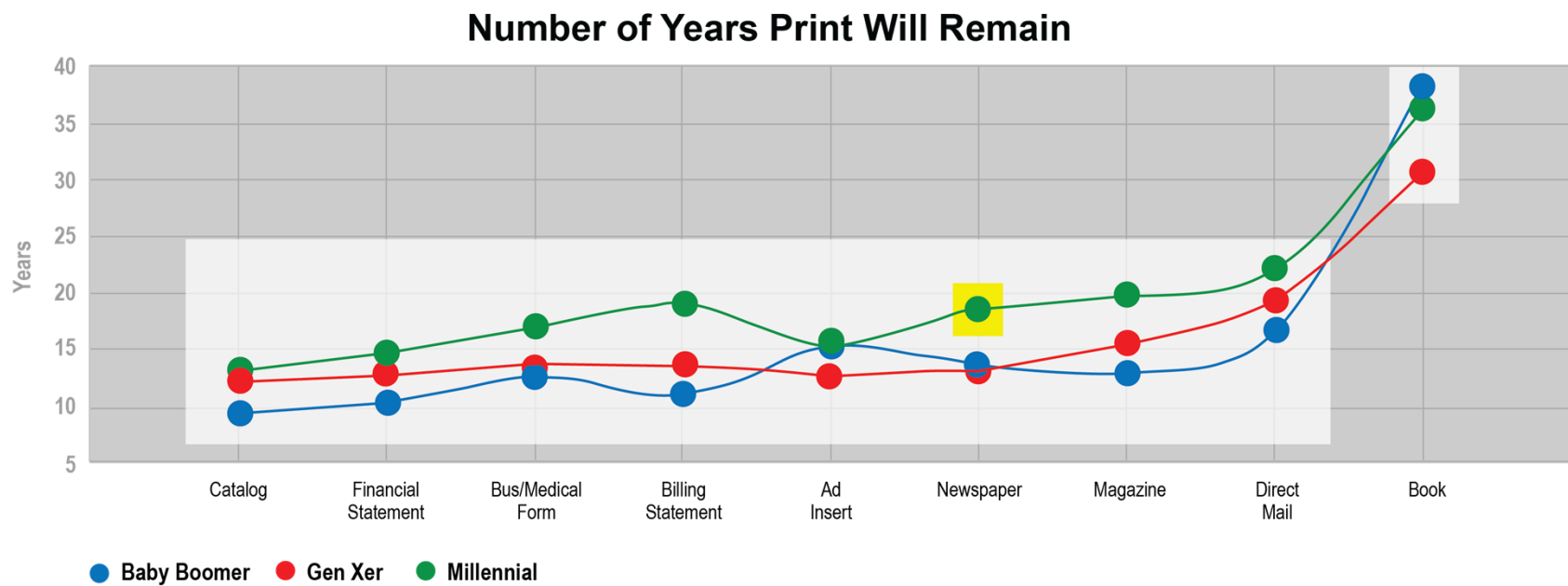
Notes: Newspaper: Read Printed | Online Newspaper  
 Magazine: Read Printed Periodical | E-Zine in Past 6 Months  
 Book: Bought Printed Book | E-Book in Past 6 Months

## Minutes Spent with Media – Print & Mobile (Daily US Average)



Source: eMarketer, Borrell; 2018

# Implications



Q: How long will it take for each of these printed products to disappear from use?



## Consider These Key Facts

### Gen X and Millennials

- “News” needs will significantly grow over the next 5 years
- Interestingly, they look for news and info at different times of day
- They look for more than just local news and different topics
- They expect truth & accuracy to a much greater degree
- Millennials *believe* in our newspaper life expectancy
- Other than friends and family,
  - *Print & online news sources* are THE most trusted sources
- However,
  - Newspapers still follow web searches, TV and Social Networks as sources used

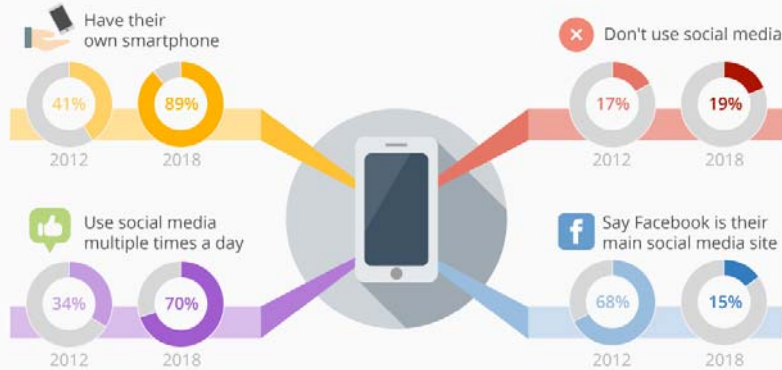
## Make a Millennial Difference -- Take Action

- ***Fill the need*** for the *increasing appetite for news & information* among our younger generations
- ***Celebrate the Trust***
- ***Fill the day – you have the right time slots*** - as they look for news and info in am and pm
- ***Boost the news & information*** - Entertainment, Science & Technology
- ***Boost the look*** i.e., inviting, vivid, eye-catching, colorful, they still love books and magazines
- ***Millennials believe in newspapers***, let's give them what they want & need

# GEN Z Bonus Material

## Teens' Phones Get Smarter and More Addictive

Change in social media habits of 13–17 year olds in the U.S. between 2012 and 2018

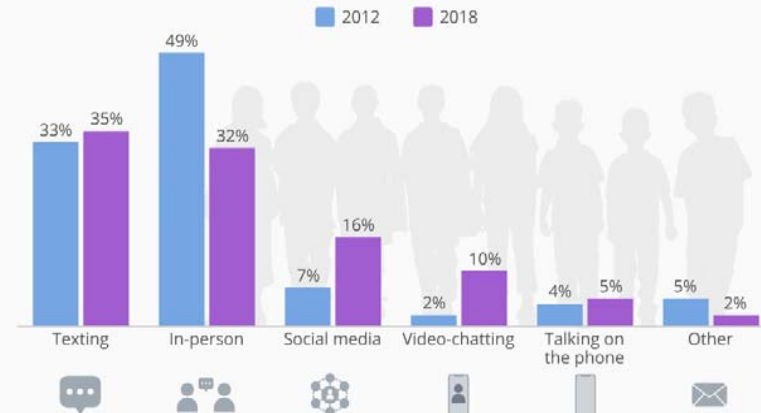


@StatistaCharts Source: Common Sense

statista

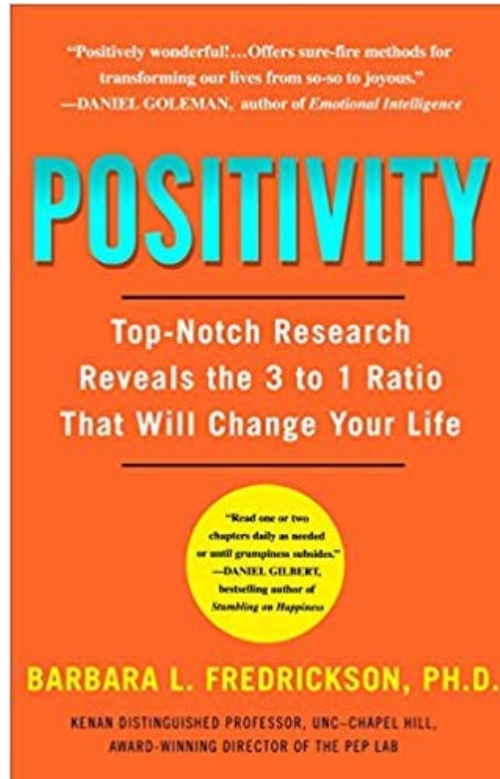
## Less Talk, More Texting

U.S. teenagers' favorite way to communicate with friends in 2012 and 2018



@StatistaCharts Based on a survey of 1,000+ U.S. teens (ages 13 to 17) conducted in 2012 and 2018  
Source: Common Sense Media

statista



## APTech, PRIMIR, ING, PRINT Positivity

*Tools and Techniques to mine for your Diamonds*

*What's in your **PRINT** tool kit?*