



Print and Paper
have a great
environmental
story to tell

www.twosides.info

The Two Sides Campaign, 2012

Promoting the attractiveness and sustainability of print and paper

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The Two Sides Campaign, 2012

Promoting the attractiveness and sustainability of print and paper

1. The Two Sides Campaign; highlights

- Online research in 10 countries with 5,000 respondents to discover the attitude of consumers towards print and paper media in a digital world.
- Magazine and newspaper support in Europe expected to reach €10million.
- Advert testing in 5 European Countries reveals that new adverts change consumer opinions.
- New consumer website
- “Myths and Facts” Booklets to educate and inform.
- Continuing campaigning against anti print and paper messages - the ‘Greenwash’ campaign. UK success rate of 80% of Greenwash messages changed.
- Roll out of all elements of the campaign to US and Australia

2. What is Two Sides?

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

The organisation spans Europe, the US and Australia and uses the following key elements to communicate with its target audience:



- Research
- Advertising; ‘No Wonder You Love Paper’ campaign
- Promotional tools; Myths and facts Booklet
- Websites: Information gathering and dissemination
- Greenwash engagement

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3. Why was the Two Sides campaign developed?

For the first time in over 2,000 years paper now faces competition from an electronic medium that promises a new means of fast and effective communication. The implications of this 'game-change' are enormous; creating challenges for educators, commercial publishers, postal operators and media buyers, in fact all those who are users or originators of Graphic Media.

The print and paper industries now find themselves in the unusual position of having to define and justify the benefits and strengths of print and paper media; something that has always been taken for granted in the absence of other competition.

Also to be recognised is the growing strength of Non-Government Organisations (NGO's). In recent years they have targeted the industry, often unfairly, but with the result that there is now an entrenched belief by consumers that paper damages forests and is a wasteful product. Those seeking to promote electronic media and associated services have taken advantage of consumer concerns and often promote electronic media as an environmentally friendly alternative to print and paper.

It is imperative now that the sustainability myths about our industry must be actively countered by a campaign with well-sourced and reliable facts which are presented both to professional print and paper users and to consumers in a simple and accurate way that will turn the tide of public opinion.

Our story is not a difficult one to tell. Print and paper is based on a renewable resource. Our products are highly recyclable. These attributes must lie at the heart of any campaign and, correctly marketed, will appeal to consumers as the true environmental impact of electronic alternatives is gradually being recognised.

Our campaign must also span continents and build into a unified global message that will equal the exposure achieved by NGO's and, by sticking to well resourced facts, deliver messages that are reliable, credible and authoritative.

This is the challenge that the Two Sides campaign faces.

4. Who is the target audience for Two Sides?

Through direct mail and business to media magazines and journals, Two Sides seeks to influence the way brand owners and media decision makers view print media and promote print on paper as an attractive and sustainable way to communicate important marketing messages.

With the support of newspaper and magazine publishers, Two Sides also delivers important messages to consumers, (business to consumer), about forests and recycling; seeking to ensure that the many environmental misunderstandings consumers have about print media are convincingly corrected with well resourced and presented facts.

5. The Two Sides 2011/2012 campaign

Research; European and US Consumer Survey, September 2011

In collaboration with the European Print Power organisation, Two Sides has commissioned research from international survey specialists IPSOS into the attitudes of consumers towards the sustainability and attractiveness of print and paper media. 9 European countries and the USA took part in the research with over 5,000 people participating by means of an on-line questionnaire. The results of the survey are to be found here: http://www.twosides.info/Content/rsPDF_165.pdf, but can be summarised as follows:

The 18–24 year old age group, the so called Digital Natives, lead consumers in appreciating paper based media:

- 83% of 18-24 year olds, (80% of all consumers), believe that reading from paper is nicer than reading off a screen.
- 78% of 18–24 year olds, (74% of all consumers), say that compared to other media, print and paper is more pleasant to handle and touch.
- 63% of 18–24 year olds, (58% of all consumers), prefer to keep important documents on paper.
- 57% of 18-24 year olds, (54% of all consumers), believe that paper records are more sustainable than electronic storage of information.
- 63% of 18–24 year olds, (68% of all consumers), believe that print and paper is based on a renewable resource.

But there are clear signs that consumers require more information about the environmental sustainability of print and paper media.

- 80% believe that forests in Europe have remained the same or decreased in size over the past 50 years. (In fact, according to the UN FAO, forests have actually increased in size by 30%)
- Most consumers believe that about 20–40% of waste paper is collected. (In fact, according to the European Recovered Paper Council, ERPC, the European recycling rate for paper and packaging is 69%. The industry is one of Europe's leading recyclers)

Two Sides concluded that, whilst consumers are still showing strong preferences for paper, we must do more to tell them about the industry's great environmental record, particularly on recycling and the very positive development of Europe's forests.

As a result of this survey, and other previous research, Two Sides has developed a new consumer focused campaign entitled, 'No Wonder You Love Paper'.

European launch; “No Wonder You Love Paper”

The campaign, which was developed from the market research, utilises the growing support of newspaper and magazine publishers who, as part of their participation in the campaign, provide free advertising space for the adverts.

No wonder
you ♥
paper

Adverts have two clear messages which talk about forestry or recycling.

- *Did you know that forests in Europe, which provide wood for making into paper and many other widely used materials, are 30% larger than in 1950? In fact they're increasing by 1.5 million football pitches every year.*[†]

Magazines are printed on paper from natural and renewable wood which is all good to know if you love reading your favorite magazine.

[†] World Forest Resources, 1953 and UN FAO Global Forest Resources Assessment, 2010

- *Did you know that almost 70% of paper across Europe is collected and recycled? In fact it's one of the most recycled materials of all.*[†]

Paper is a powerful communication material and it's made from natural and renewable wood. Which is all great news if you need the impact that only printed documents can deliver.

[†] Monitoring Report of the European Recovered Paper Council, (ERPC), 2010.

Adverts use multiple images which can be chosen by publishers to suit their readership profile.



The adverts follow the same style in other participating countries:



Assessing the impact of the adverts is important and, after exposure to adverts, in further consumer research carried out by IPSOS in January 2012:

- 76% of consumers now understand that over 60% of European paper is recycled, (from 8%).
- From 78% believing that forests are **reducing** in size, 75% of consumers now believe that forests are **increasing** in size.

The campaign is therefore expected to significantly and positively affect consumer attitudes toward Print and Paper Media over the next 12 months.

The free space offered by advertisers is the most valuable part of the campaign. For example, in the UK, advertising space in the region of £2 million has been offered with an expected 50 million+ page views. In Belgium, advert space is estimated to be worth €350k with 2.5 million page views. Similar advertising benefits are expected in other countries as the campaign is rolled out.

Websites

Two Sides operates 9 websites, (7 “Two Sides” and 2 “Youlovepaper”), in 7 countries and 5 languages.

The Two Sides site, www.twosides.info, is now a highly regarded fact resource for the industry; the basis of newsletters and information for members and visitors.

The youlovepaper site, www.youlovepaper.info, has been developed to support the new advertising campaign and assist consumers to understand the basic facts about paper’s sustainability. It features quizzes and competitions as well as simply setting out the myths and facts about our industry.



Myths and Facts Booklets

These are now available in Europe, the US and Australia, and in several different languages, and are widely used by members to promote their own sustainability initiatives to staff and clients. The latest version v.6 now incorporates a section on electronic media.



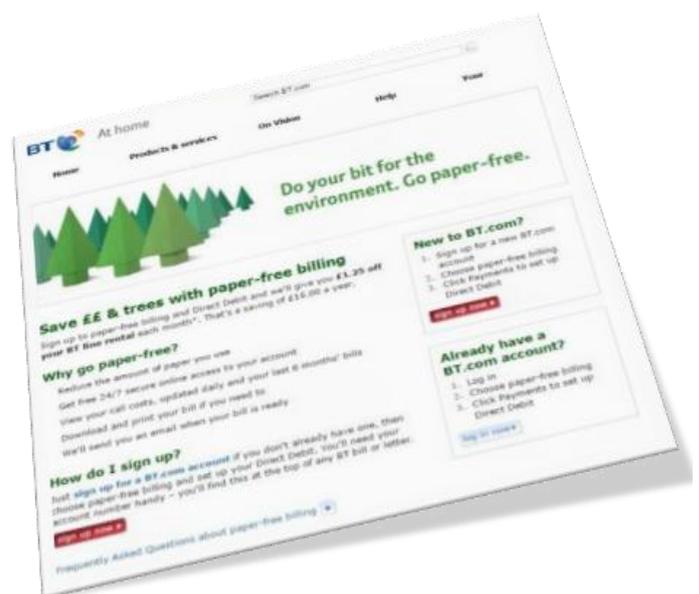
The content of the booklet differs from market to market reflecting the differing environmental facts, for example from the US to Europe, but the styling of the booklet is maintained across markets and presents a clear unified message.

Greenwash Engagement; Combating anti-print and paper messages

Two Sides successfully campaigns against the anti print and paper messages from Banks, Utilities and Telecoms.

This activity started in the UK in 2010 and has continued in 2011/12. A new US campaign is just starting in 2012, run by Two Sides US in conjunction with The American Forest and Paper Association (AF&PA), and the Envelope Manufacturers Association (EMA).

British Telecom (BT) was typical of an organisation making environmental claims without evidence. They have now removed these environmental claims.



'An example of Greenwashing' from BT in the UK.

'Do your bit for the environment. Go paper free. Save £'s and trees with paper-free billing'

Challenged by Two Sides, many companies change their messages, removing any environmental claims. Out of the 108 companies challenged by Two Sides in the UK, 83% of Banks, 64% of Utilities and 100% of Telecoms changed their messages.

In the US, research shows that over 50% of similar organisations use Greenwash in their messaging. The US campaign seeks to have similar success to that achieved in Europe.



Besides the usual messages from billing companies, who seek to persuade consumers to move away from printed communications, organisations like 'Pay It Green' have emerged to promote electronic storage and information systems. In the process they claim that this is more environmentally friendly.

This is Greenwash and these messages damage the image and reputation of all print media channels.

6. Endorsements

The Two Sides campaign has been endorsed by many leading organizations. Here are a few from some of our members:

Berry Wiersum, CEO, Sappi Fine Paper Europe

“Sappi has been involved with Two Sides for approximately four years, both as a sponsor and as a partner in telling the paper industry’s sustainability story. Sappi is the largest Fine Coated Paper supplier to the European printing industry and is highly engaged in the sustainability question as it relates to our own production facilities, the raw materials and energy we use, our carbon footprint and how our products are perceived by customers and consumers.

Right from the start we found the Two Sides approach highly effective, based as it was on a straightforward formula of attacking the untruths spoken and written about the paper industry and emphasizing the extremely positive sustainability credentials which the industry has in Europe. In fact, it was so successful in the UK that when the industry started looking at promoting the benefits of print, both for its communication effectiveness as well as its sustainability benefits, we quickly resolved to invite Martyn Eustace, founder of Two Sides, onto the management team running the campaign to lead the sustainability part of it.

Two Sides has since then gained a solid reputation throughout Europe as a cost effective, no-nonsense promoter of the industry’s reputation and dispeller of misconceptions of the misinformed.

Sappi continues to support Two Sides enthusiastically.”

Thomas Ehrnrooth, Vice President, Marketing & Communications, Paper Business Group, UPM

UPM has long supported the need for clear convincing messaging across the whole industry. Whether these are environmental issues, general education about the graphic supply chain or the importance of print as a communications channel, the paper industry has a powerful story to tell. Two Sides recognises this need and through strong coordination across global businesses, delivered a wide range of initiatives. Two Sides has tackled a number of issues head on, something that individual companies cannot do. In addition, Two Sides is able to harness the collective need for promotion. Two Sides has grown its membership base through strong leadership, the next step has been taken in terms of engaging with consumers – a critical step in the positive narrative need.

Beatrice Klose, Secretary General, Intergraph, (European Printing Industry Body)

“Two Side’s consistent, uniform message is one of its real strengths. Sharing the same visual appearance and coordinated message will have a much more positive effect on the globalizing market. Furthermore, the centrally designed marketing material offers cost-effective means to participate in the campaign, with no need to hire an extra pair of hands. I am pleased to see so many countries taking up the initiative, and welcome others to join in.”

Susan Brunner, Sustainable Brands Marketing Manager, Mondi Uncoated Fine Paper.

“Mondi is very pleased with the work that Two Sides has done this past year in their ‘We Love Paper’ campaign. It’s vital to get the positive message out to consumers about paper being a sustainable resource and Two Sides has been a champion in this area. We support knowledge sharing through educational initiatives to our employees and customers to develop an eco-conscious mind-set, and Two Sides helps foster this with their ‘We Love Paper’ campaign.”

Graham Morgan, CEO, GEON print & communication solutions, Australia

“GEON has watched and admired the Two Sides campaign across several countries over the past twenty four months. When the opportunity arose for Two Sides to launch in Australia GEON was 100% supportive and firmly committed. With representation across the Supervisory Board, Steering Committee and Working Groups, GEON committed funds and resources. In the six months Two Sides – Australia has been operating locally we are already seeing movement and change with our client’s perceptions on the environmental credentials of paper and print.

The paper and print industries need a neutral voice to communicate the environmental characteristics and improvements to our customers. Challenging client perceptions and policies requires dedication and firm commitment to communicating the principles. Two Sides has achieved this balance and takes direct action without bias delivering results and most critically, reformed thinking within corporate circles.

I have personally worked with Martyn and the Two Sides – Australia team and can attest to their professionalism and passion to drive change not only within the paper and print industry but further throughout the public mindsets of the sustainability of our industry.”

David Fulchiron, Strategic Marketing Director, European Papers, International Paper

“Two Sides has been a very effective lobbying organization for the industry since its creation and has recorded remarkable successes in getting large companies to drop false claims about paper and the environment; most recently contributing to lead Toshiba to abandon their NNPD, (National No Print Day), initiative.

The new promotional campaign is now taking the industry a step forward by targeting the general public and is already a great success in some European countries. It has raised a lot of interest among the press which praises the clarity, the relevance and the impact of the slogan, and we are working on extending the success to as many countries as possible.”

Lewis Fix, VP Sustainable Business & Brand Management, Domtar

“Domtar is pleased to welcome Two Sides to the United States. Two Sides serves a strategic role in aggregating the influence of the paper, print and related industries – to advocate on its behalf in a way that has not yet been done. We are pleased to see membership continue to grow, and look forward to more support in the coming months and years.”