Paper's Place In A Post-Pandemic World

The Two Sides Trend Tracker survey examines consumer attitudes towards print, paper, paper packaging and tissue products

European Findings

Print, Paper and Paper Packaging have a great environmental story to tell

TWO SIDES

www.twosides.info

About The Survey

In January 2021, a global study of 8,800 consumers was commissioned by Two Sides and conducted online by independent research company Toluna.

Nationally representative surveys were undertaken in Brazil (1,000), the United States (1,000) and Europe, including Austria (500), Belgium (600), Denmark (500), Finland (350), France (1,000), Germany (1,000), Italy (1,000), Norway (350), Sweden (500) and the United Kingdom (1,000).

The survey explores consumer preferences, perceptions and attitudes towards print, paper, paper packaging and tissue.

This report only sets out the key findings for Europe. To request the full report, broken down by country and age, please visit: **www.twosides.info/trendtracker**

Jonathan Tame
Managing Director,
Two Sides Europe

"The Trend Tracker survey seeks to understand consumer perceptions across a wide range of topics relating to print, paper, paper packaging and tissue products. We will begin to build on previous surveys and continue to track important consumer perceptions about the attractiveness and sustainability of paper-based materials.

The Trend Tracker survey will be repeated every two years, enabling us to look back and report on any significant changes or trends that the industry should take note of. These findings can be used to inform and guide the industry to help improve demand and bust the most common myths about our products.

We hope you find this report informative and useful.

If you have any comments about the survey or ways we can improve it, please contact us at enquiries@twosides.info."

About Two Sides

Two Sides is a not-for-profit global initiative promoting the unique sustainable and attractive attributes of print, paper and paper packaging.

Globally, Two Sides has thousands of supporters spanning the print, paper and packaging value chain, including forestry, pulp, paper, packaging, inks and chemicals, finishing, publishing, printing, envelopes and postal operators.

Contact Two Sides

If you would like to learn more about this report or find out about the many other tools and resources Two Sides produces, please get in touch.

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Key Findings - Europe

Environmental Perceptions

- Only 10% believe European forests are growing.
- Only 16% believe the paper recycling rate exceeds 60%.
- 37% believe that paper and paper packaging are bad for the environment.

Media Habits

- 57% prefer to read books in print.
- 55% don't pay attention to online adverts.
- 74% want the right to choose how they receive their bills and statements.

Packaging

- 55% prefer paper packaging for being better for the environment.
- 33% believe 'the individual' has the most responsibility to ensure we reduce our use of non-recyclable packaging.
- 40% would consider avoiding a retailer if they were not actively trying to reduce their use of non-recyclable packaging.

Tissue

- 65% want to see the tissue industry investing more in sustainable manufacturing.
- 44% worry about the environmental impacts of tissue products.

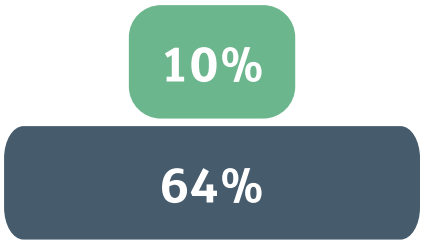
Environmental Perceptions of Paper

The print and paper industry is surrounded by myths, many of which are rooted in historical misconceptions about paper's impact on forests. For many years, service providers have reinforced these environmental myths in their efforts to move consumers to digital communications. The need to bust these myths and raise awareness of paper's sustainability is now more important than ever.

The Growth of European Forests

The study found that only 10% of Europeans understand that European forests are growing; a perception unchanged from the last time consumers were asked in 2019. 64% believe that they are decreasing in size, 11% believe they are staying the same, and 15% were unsure.

Percentage of Consumers Who Believe European Forests Are Shrinking/Growing



Believe forests are growing

Believe forests are shrinking

Between 2005 and 2020, European forests grew by 58,390km^2 – that's an area larger than Switzerland and equivalent to 1,500 football pitches of forest growth every day.[1]

This has been due to afforestation (for example, planting and seeding of trees on land that was not previously forested) and through the natural expansion of forests on areas such as abandoned land.

To ensure the long-term growth of these forests, the pulp and paper industry supports sustainable forest management. 74% of wood and 90% of pulp purchased by the European pulp and paper industry is FSC® or PEFC™ certified.[2]

The Truth About Paper Recycling

Percentage of Consumers Who Believe The Recycling Rate Exceeds 60%

	2021	2019
Paper	16%	20%
Glass	16%	17%
Metal	11%	13%
Plastic	9%	10%
Electronic Devices	5%	5%

Only 16% of European consumers understand that the paper recycling rate exceeds 60%, falling from 20% in 2019. This shows a worrying fall in consumer understanding of paper's 72% actual recycling rate (84% of paper packaging).

This recycling rate is taken from a total of 57.5 million tonnes of paper that was collected and recycled in 2019. Europe is the world's paper recycling champion, having the highest rate globally. It is followed by North America (68%) and Asia (54%). Within Europe, 15 countries exceed a 70% recycling rate.[3]

Actual recycling rates: Glass (74%), Metal (80%), Plastic (42%) and Electronics (42%).[4,5]

[1] FAO, 2020 [2] Cepi, 2018 [3] Cepi, 2019 [4] Eurostat, 2019 [5] Global E-waste Monitor, 2020

This report covers the key findings only. To request a copy of the full results, please visit **www.twosides.info/trendtracker**

The impact we have on the environment is now far better understood. At every level – individual, business and government – the focus is on how we can all do our part to protect the planet. In 2021 and beyond, it's important that all within the industry do their bit in promoting our environmental credentials and decreasing the concerns consumers have relating to print, paper and paper packaging.

Diminishing Consumer Concerns About Paper

37%
Believe

Paper and paper packaging are bad for the environment

Paper is based on wood, a natural and renewable material. As young trees grow, they absorb CO_2 from the atmosphere. Furthermore, as a wood product, paper continues to store carbon throughout its lifetime, equivalent to removing 693 million tonnes of carbon dioxide from the atmosphere annually.[1] The industry is committed to de-carbonising by 80% compared to 1990, meaning that the European forest fibre and paper industry's emissions would be decreased by 12 million tonnes of CO_2 by 2050.[2]

The majority of consumers assume that digital communications are environmentally friendly. However, the environmental impacts of digital are often overlooked. The ICT industry accounts for 2.5 - 3% of global greenhouse gas emissions and this is predicted to rise to 14% by 2040.[3] In Europe, print and paper products are one of the lowest industrial greenhouse gas emitters at 0.8%.[4]

60%
Believe

Electronic communication is more environmentally friendly than paper-based communication

70%
Believe

It is important to use paper products from sustainably managed forests

Healthy forests are essential to produce paper and paper-based products, and the industry invests heavily in sustainable forest management. Forest certification schemes are ingrained in the way the industry works to ensure raw materials are sourced from sustainable forests. Most of the industry's raw material has FSC® or PEFC™ certification. The Forest Stewardship Council (FSC®) is a non-profit, multi-stakeholder organisation established in 1993 to promote responsible management of the world's forests. The Programme for the Endorsement of Forest Certification (PEFC™) is an independent, non-profit, non-governmental organisation founded in 1999, which promotes sustainably managed forests through independent third-party certification.

Of course, it's not possible to just use recycled paper. 55% of the fibrous raw material for Europe's paper industry is from paper for recycling.[5] Paper products cannot be recycled indefinitely as the fibres get too short and degraded for making new paper products. The cycle must therefore constantly be refilled with new strong virgin fibres from sustainably managed forests.

68%
Believe

Only recycled paper should be used

1. WBCSD, 2015 2. Cepi, 2050 Outlook, 2020 3. Belkhir L & Elmeligi A, 2018 4. Cepi, 2018 5. Cepi, 2019

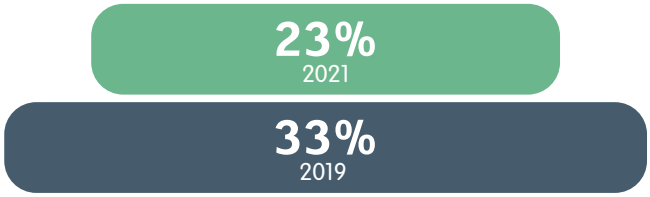
The Challenge For Paper In A Digital World

The survey reveals how the Covid pandemic has brought disruption for traditional print media as consumers have become more familiar and reliant upon online news and receiving digital communications. Working from home has also significantly impacted the way millions of commuters used to get their daily news from physical newspapers.

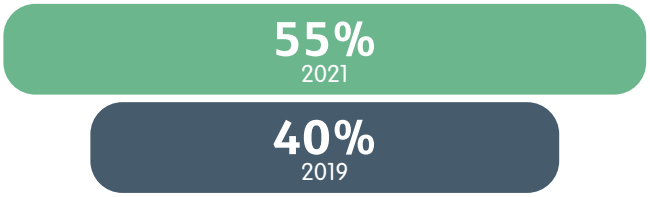
Many of the traditional news brands have successfully developed or improved their own online platforms. For many consumers, online has become the default reading option.

Disruption, Media Choice, Attention And Trust

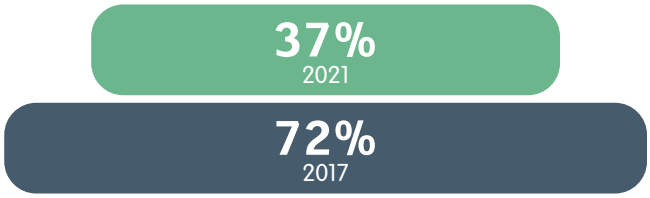
Consumer perceptions have been changing and the shift from our previous surveys has been significant.



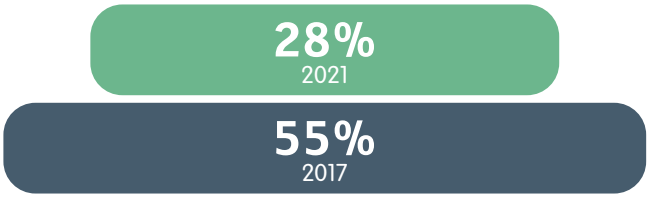
Trust news in printed newspapers*



Believe it is important to use paper products from sustainably managed forests



Prefer to read magazines in print



Prefer to read newspapers in print

During the pandemic, traditional newspapers worked hard to enhance and grow their online readership. This increased online presence of traditional news brands may help explain why trust in online media has grown.

It's not so much that consumers have lost trust in print media, but their trust is now shared among other reputable ways to read and consume content.

Will print make a comeback? It will be interesting to see how reading preferences evolve in a post-Covid world.

*Respondents were asked to agree or disagree with the following statements:
Statement asked in 2021: I trust news stories more when they are in printed newspapers, rather than when they are online.
Statement asked in 2019: I trust the news stories I read in printed newspapers.

Attitudes Towards Digital

49% **Believe they spend too much time on electronic devices**

31% **Believe they suffer from digital overload**

46% **Are concerned that the overuse of electronic devices could be damaging to health (eye-strain, sleep deprivation, headaches)**

55% **Are increasingly concerned that personal information held electronically is at risk of being hacked, stolen, lost or damaged**

This report covers the key findings only. To request a copy of the full results, please visit **www.twosides.info/trendtracker**

While the pandemic made consumers more familiar with and more reliant on digital communications, survey results reveal many positives for printed content. Consumers say they get a better understanding of news stories in print and would be concerned if printed newspapers were to disappear, demonstrating opportunities for printed magazines and newspapers to build on their position as channels for informative, in-depth content. Consumer still prefer to read printed books, and want to retain the choice to receive printed bills and statements from their service providers.

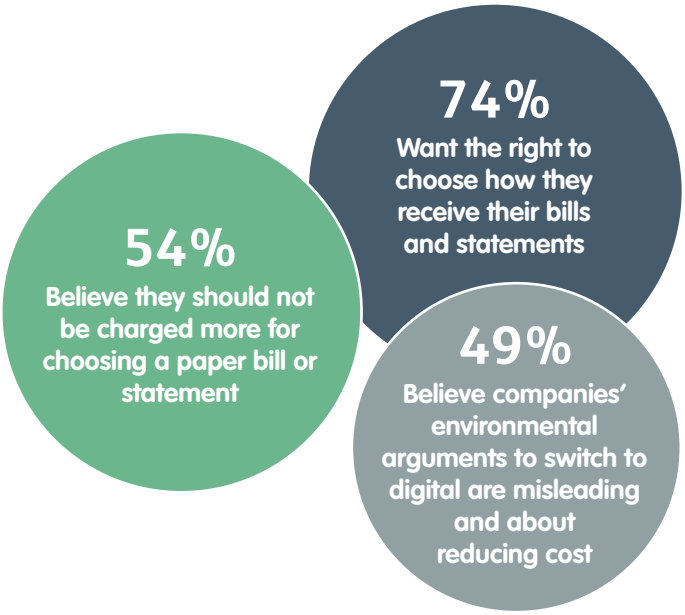
Communicating With Consumers

For advertisers, print has been an opportunity to speak to consumers during the long lockdown. Many previous industry studies have shown that direct mail and door drop receive a high degree of attention, which can only have grown during Covid. Online advertising remains something that consumers try to avoid.

Post-pandemic, as companies grow and re-establish themselves, print will be a powerful and effective way to connect physically with the consumer.

And when it comes to receiving bills and statements, service providers should be aware that most consumers want the right to choose how they receive bills and statements, either in the post or online. The majority say that they should not be charged more for choosing a paper bill or statement.

Furthermore, consumers understand that companies that make misleading statements about the environmental benefits of switching to digital communications are really just trying to save costs.



The Positives For Print

39%

Get a better understanding of a story when reading in print rather than online

57%

Prefer to read books in print

40%

Would be concerned if newspapers were to disappear

Packaging Preferences Unpacked

The way individuals buy and consume products changed dramatically in 2020. With physical stores closed during the pandemic, shoppers moved online and there was a resulting surge in demand for packaging. As a record number of packages arrived at consumers' homes, awareness of packaging choices and attention to the environmental impacts of that packaging increased as well. Survey results show that more consumers believe paper-based packaging is better for the environment than all other packaging materials.

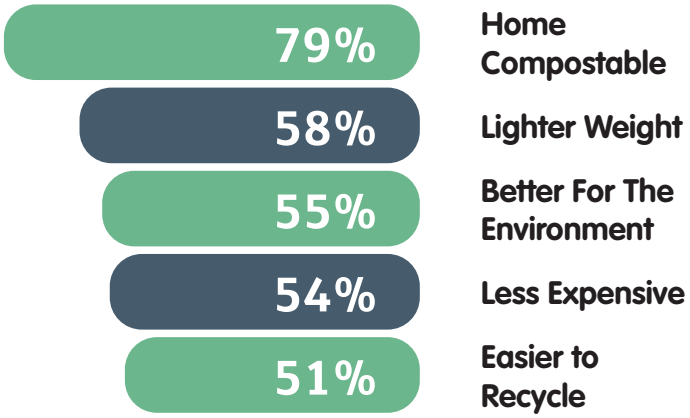
Paper - The Preferred And Sustainable Packaging Choice

Packaging plays an extremely important part in the purchasing decision as it displays vital product information and is used to preserve or enhance product quality. Packaging comes in a variety of forms and the packaging industry is always innovating to meet the demands of the consumer.

Consumers were asked to choose their preferred packaging material based on a range of environmental, visual and physical attributes. These packaging materials were paper/cardboard, plastic, glass and metal.

Of 15 attributes, paper/cardboard was the favourite for 10, glass for 4, metal for 1 and plastic for 0.

Percentage Of Consumers Who Prefer Paper/ Cardboard Packaging For The Following Attributes



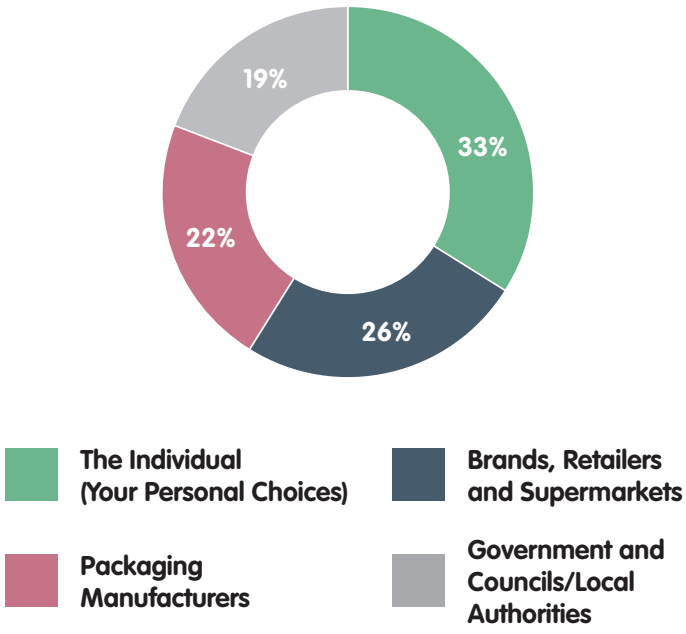
Reducing Non-Recyclable Packaging - Who's Responsible?

With consumers, businesses and governments looking for ways to reduce waste and create a more sustainable, circular economy, the use of non-recyclable, single use packaging and its effects on the environment have come into sharp focus.

Consumers were asked to rank who they believe has the most responsibility for reducing the use of non-recyclable packaging.

33% believe the individual has the most responsibility, followed by 26% who believe it's down to brands, retailers and supermarkets.

Who's Responsible For Ensuring We Reduce Our Use Of Non-Recyclable Packaging?



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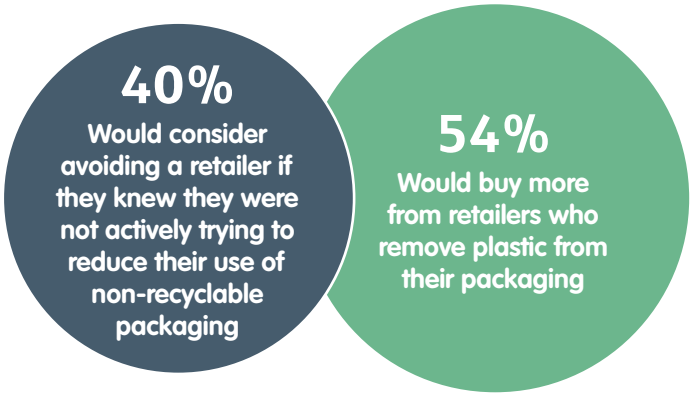
At the touch of a screen, you can search, order a product and have it safely delivered to your door within 24 hours. But consumers are aware of the impacts of packaging on our planet, and they are increasingly demanding that retailers do more to ensure packaging is recyclable. Additionally, only half believe that retailers are doing enough to introduce sustainable packaging.

Consumers Demand Retailers Do More

Retailers play a crucial role in the innovation of product packaging and their use of recyclable, sustainable materials. In response to increasing media and consumer pressure to perform and behave in a more sustainable way, we have seen retailers throughout Europe, particularly supermarkets, improve and communicate their environmental credentials, achievements and commitments.

The survey discovered that consumers would be willing to act if they didn't think a retailer was doing enough. 40% would consider avoiding a retailer if they were not trying to reduce their use of non-recyclable packaging. 54% would buy more from retailers who removed plastic from their packaging.



The Rise In Online Shopping: Positive News For Paper Packaging

The shift to online shopping has been happening for many years. However, this way of life has been accelerated further by the global pandemic. Individuals who may have preferred going to a physical shop have been forced to go online due to lockdowns and shop closures.

However, just because consumers are having to go online doesn't mean they aren't considering how those products are delivered.

68% of consumers prefer products ordered online to be delivered in fitting packaging, showing a desire to reduce waste. A further 57% prefer products to be delivered in paper packaging, likely because of its recyclable qualities.

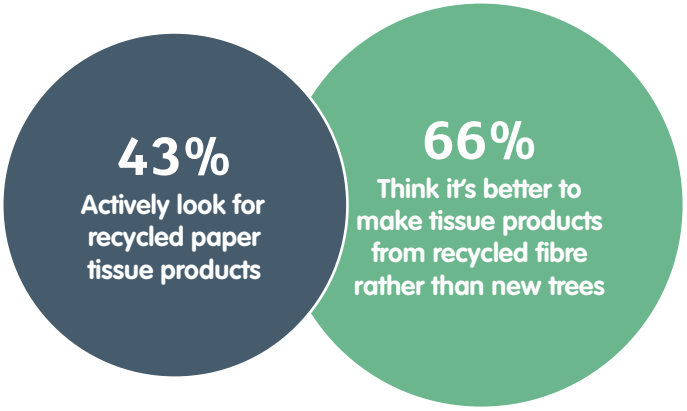
The Environmental Story of Tissue Products

Tissue products form an essential part of our everyday lives. It's a resource we all value, and sometimes take for granted, for sanitary and health benefits. However, there are several myths surrounding the tissue industry, including its demands upon forests, the environmental impact of tissue products and paper recycling, which all negatively influence consumer perception.

Consumers Prefer The Idea For Recycled Tissue Products

The survey revealed a preference for tissue products to be made from recycled paper. 66% think it's better to make tissue products from recycled fibre and 43% actively looking for recycled paper tissue products.

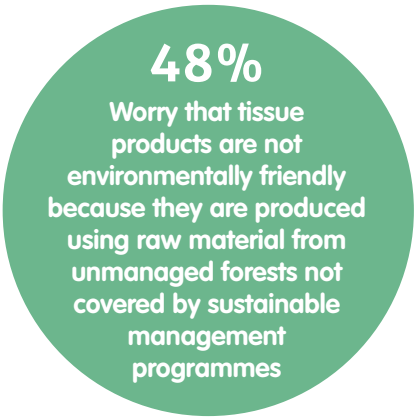
Recovered fibre already plays an essential part in European tissue production, however fresh fibre from sustainably managed forests will always be needed to ensure the supply of tissue products meets demand. The industry uses recycled and fresh fibres from sustainably managed forests, which account for over 90% of all raw materials used.[1]



Tissue Products And Sustainably Managed Forests

European consumers remain concerned that tissue products should originate from sustainably managed forests. 48% are worried that tissue products may not originate from sustainable forests. This clearly shows that the industry has more to do to inform consumers about the sustainability of tissue products.

As already noted, 74% of wood and 90% of pulp purchased by the European pulp and paper industry comes from FSC- or PEFC-certified sources.[2]



Consumers Want To Know How Sustainable Tissue Products Are

65% Want to see the tissue industry investing more in sustainable manufacturing

59% Would like to see more information about the sustainability of tissue products

44% Worry about the environmental impacts of tissue products

45% Think that tissue products are wasteful

[1] ETS, 2020 [2] CEPI, 2018

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Considerations

The survey shows that there are many environmental misconceptions surrounding print and paper products (newspapers, magazines, books, packaging and tissue). Many consumers believe that European forests are shrinking in size. They also massively underestimate the paper recycling rate and do not understand the sustainable nature of paper products.

These misunderstandings are making the work we do with Two Sides and Love Paper vital.

It's more important than ever that we continue to tackle organisations making misleading and unsubstantiated marketing claims such as "Go Green, Go Paperless" in a bid to encourage their customers to switch to digital communications.

49% of consumers think that companies' green claims are misleading and about reducing cost. 74% do not want to be pushed to digital communications and demand the right to choose how they continue to receive their bills and statements.

Equally, we must continue to talk directly to consumers via our Love Paper campaign to reassure them on the facts about the sustainable nature of our products and the industry's environmental credentials.

Although paper packaging has a good reputation among consumers for being better for the environment (55% agreed), it must not be taken for granted that paper is the natural choice to achieve a circular economy.

It would be easy to do so with emerging legislation that would apply further pressure to transition to more sustainable packaging. But it must not be assumed that paper is the only alternative, with new innovations entering the market that meet recycling standards.

A continuing communication of paper packaging's environment benefits is needed to ensure that paper packaging remains the preferred packaging choice for consumers.

Request The Full Report

This report covers the key findings from the Two Sides Trend Tracker Survey 2021.

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