Busting the Myths

A study of U.S. consumer perceptions and attitudes towards print and paper

Print and Paper have a great environmental story to tell

TWO SIDES

INTRODUCTION

A survey of 2,094 U.S. consumers was commissioned by Two Sides and carried out by independent research company Toluna in February 2019.

This report explores consumer opinions and beliefs about print and paper's environmental impact; preferences related to reading in print versus digitally; and receiving paper or electronic communications from their service providers.

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Phil Riebel
President,
Two Sides North America, Inc.

We are pleased to present our latest consumer research which reveals many interesting insights into consumer attitudes towards print and paper.

Survey results show that there are still significant gaps between consumer perceptions and actual fact when it comes to environmental topics such as forestry and recycling.

U.S. consumers maintain a considerable preference for print when reading books, magazines and newspapers. They also strongly value their right to choose paper communications from their banks and other service providers.

The results presented below provide useful information in support of print and paper, and they identify great opportunities for further public education.

We hope you find this report informative.

About Two Sides

Two Sides is a global initiative by companies from the Graphic Communications Industry including forestry, pulp, paper, inks and chemicals, pre-press, press, finishing, publishing, printing, envelopes, and postal operators.

Our common goal is to promote the sustainability of the Graphics Communications Industry and dispel common environmental misconceptions by providing users with verifiable information on why print and paper is an attractive, practical and sustainable communications medium.

Contact Two Sides

If you would like to learn more about this report or find out about the many other tools and resources produced by Two Sides, please contact us.

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KEY FINDINGS

Environmental Perceptions

- 58% of consumers surveyed believe U.S. forests have been decreasing in size since the year 2000. In fact, U.S. forests had a net growth of over 1,500 NFL football fields per day since 2000. Results by age group are shown in the graph to the right.
- Only 15% of consumers think the paper recovery rate in the U.S. exceeds 60% (it is over 68%!).
- Out of 8 common materials and products, wood is considered the most environmentally friendly material, followed by paper and glass.
- Out of 8 common materials and products, electronic devices ranked as the least environmentally-friendly, followed by plastic.

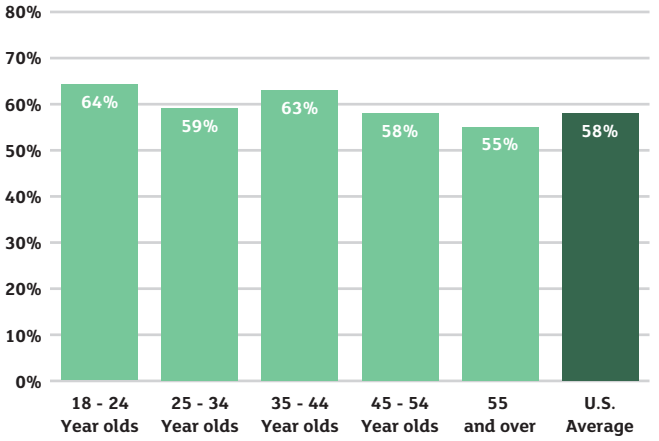
Reading Preferences (Print vs. Digital)

- 68% of consumers believe print is the most enjoyable way to read books.
- 65% find printed magazines most enjoyable and 53% prefer printed newspapers. Age group differences for reading preferences are shown in the graph to the right.
- 53% are concerned the overuse of electronic devices could be damaging to their health.
- 49% believe they spend too much time on electronic devices.

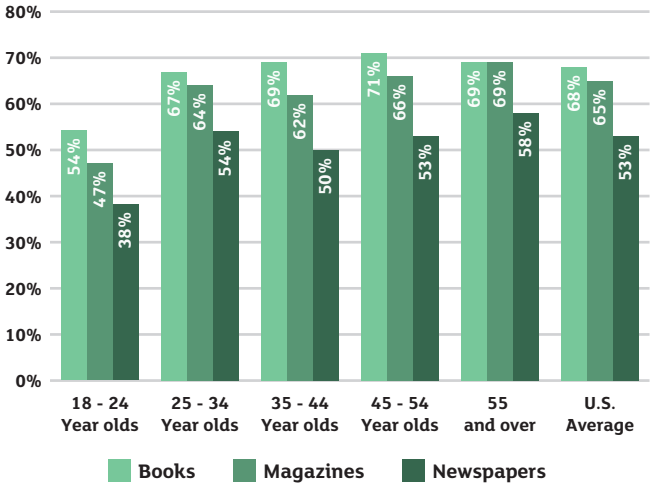
Receiving paper bills and statements

- 86% of American consumers believe they should have the right to choose how they receive communications. Age group differences are shown in the graph to the right.
- 85% believe they should have the right to revert to paper options after choosing digital.
- 74% believe they should not be charged for paper bills and statements.

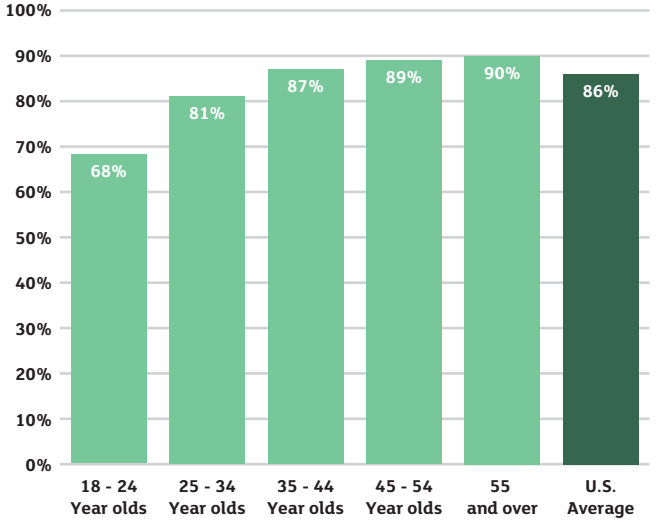
Percentage of consumers who believe U.S. forests have been decreasing in size



Percentage of consumers who prefer to read in print



Percentage of consumers who believe they should have the right to choose how they receive communications

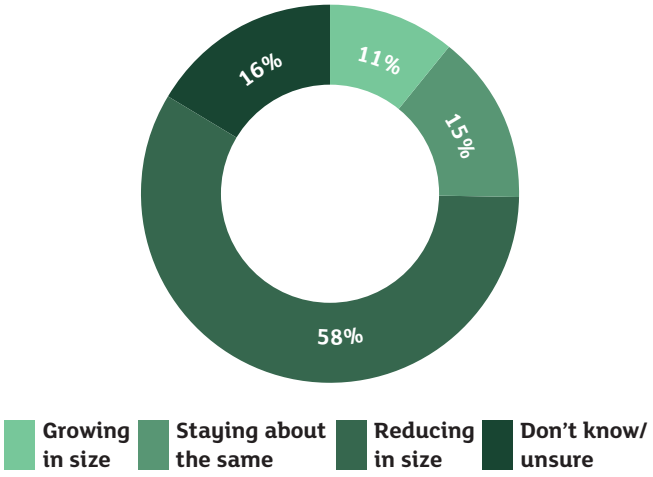


UNDERSTANDING FORESTS

Since the year 2000, U.S. forests have had a net growth in area equivalent to more than 1,500 NFL football fields per day, or about 800,000 acres per year.[1] However, the survey reveals that only 11% of respondents believe U.S. forests have been increasing in size.

The paper industry depends on sustainable forest management to provide a reliable supply of wood fibre - the key raw material for its products. Well-managed forests also bring multiple benefits for society, such as livelihoods, ecosystem services and biodiversity.

What do you believe has been happening to the size of U.S. forest area since the year 2000?



Forest certification to independent third-party standards promotes forest management practices that result in outcomes that are economically viable, ecologically sound and socially just. Globally, a total of 1.06 billion acres are certified under the Programme for the Endorsement of Forest Certification[2] (including the Sustainable Forestry Initiative or SFI) and the Forest Stewardship Council® (FSC®).[3] Although only about 10% of the world's forests are certified, half of them are in North America.[4] About 20% of U.S. forest area is certified to either FSC, SFI or American Tree Farm System (ATFS) standards.[5]

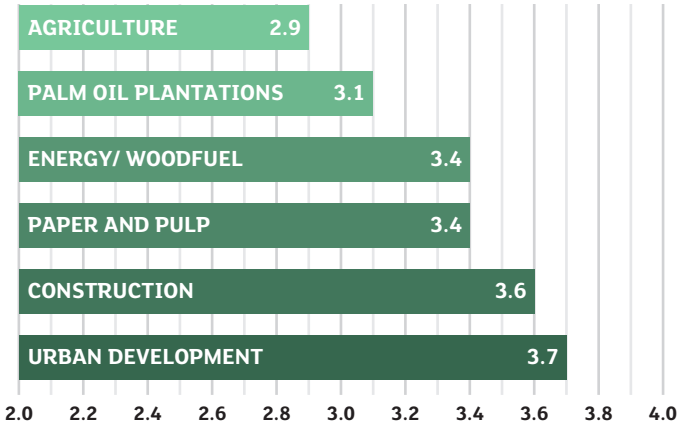
When it comes to paper purchasing behavior, 70% of U.S. consumers believe it is important to use paper products from sustainably managed forests. However, only 27% pay attention to forest certification labels when purchasing paper.

Despite the importance of these certifications to the paper supply chain and wider forest products industries, the survey found that only 24% of American consumers are aware of FSC, 26% are aware of SFI and 19% are aware of ATFS.

Although the U.S. has had a net growth of forests for many decades, it is important to note that deforestation is of concern in many other areas of the world (ex: the tropics).

Agriculture is the main cause of deforestation globally,[6] yet the survey found consumers believe this activity to have the least impact on forests.

Which industry/ activity do you believe has the most impact on forests? 1 being little impact, and 5 being the most damaging impact.



The key causes of deforestation in the U.S. are urbanization, agriculture and other developments. It should be noted that pulp and paper is not a cause of forest loss in the U.S. due sustainable forestry practices, government regulations and forest certification programs.

When considering the world's wood harvest, 50% is used for fuel and over 30% is processed for other industrial uses, such as construction and furniture. There are other uses, including 13% used by the paper industry.[7]

CIRCULAR BY NATURE

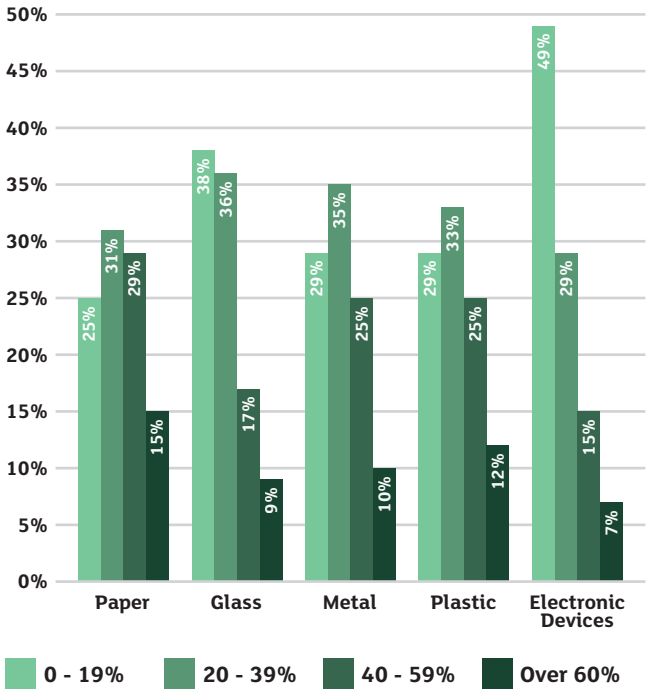
The ability to easily collect and recycle a product – for both consumers and industry – is critical to a circular economy. The overall U.S. paper recovery rate in 2018 was 68.1% and has increased significantly since 1990 when it was only 33.5%. For paper packaging, the recovery rate is higher than 75%, the highest of any packaging material in the U.S.[8]

AF&PA[9] member companies have set a goal to increase the paper recovery rate to more than 70% by 2020.[10] Overall recovery rates above 75% are very difficult to achieve because some paper products cannot be recovered due to damage or contamination when used (e.g. paper towels and tissue), and others are kept for long periods of time (e.g. books and archived documents).[11]

The survey found that U.S. consumers perceive paper to have the highest recovery rate, although only 15% of consumers are aware the paper recovery rate exceeds 60%.

Plastic is the least recycled packaging material in the U.S. with a recovery rate of 9.1%.[12] Yet 25% of consumers believe 40 to 59% of plastic is recovered and a further 12% believe the plastic recovery rate is over 60%.

What percentage of the following products do you think is recycled in the U.S.?

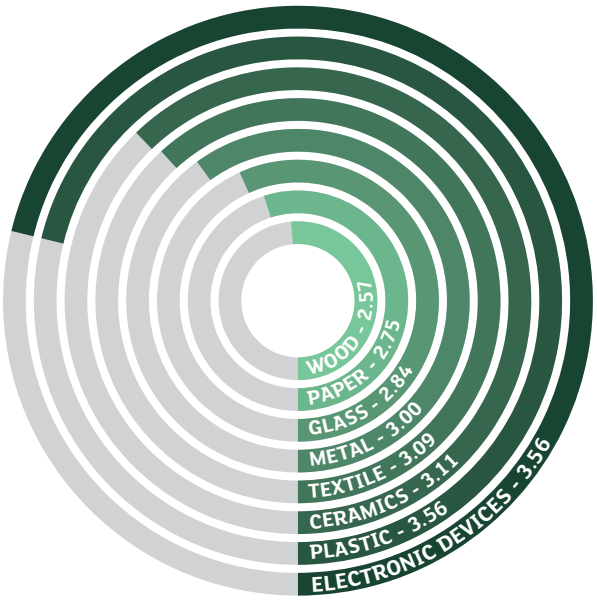


54% of consumers surveyed believe only recycled paper should be used to make paper products. In reality, a continual input of 35% to 65% of fresh wood fiber is needed to make the global papermaking cycle work (depending on the grade of the paper manufactured).

This is because at least 15% of paper products are permanently removed from the fiber cycle as mentioned above. In addition, fibers break down during the recycling process and can only be re-used 5 to 7 times at most.[13,14]

Globally, recovered paper is the most important papermaking fiber raw material and makes up over 56% of fiber used by the pulp and paper industry.[15]

In your opinion, what is the environmental impact of following materials/ products? Please rate from 1 – 5, with 1 being the least environmental impact and 5 being the greatest impact. (Graph shows mean score).



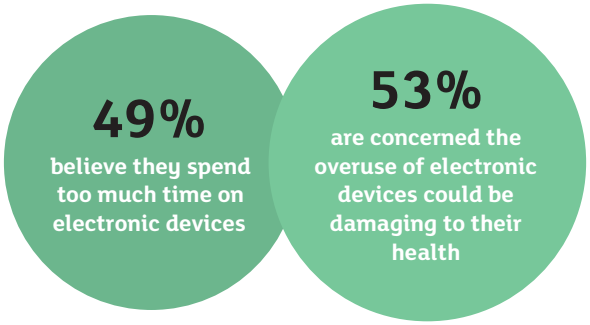
U.S. consumers believe wood to be the most environmentally-friendly material out of a list of several common products and materials used regularly (see figure above), closely followed by paper and glass.

Electronic devices (laptops, desktop computers, smartphones, tablets and e-readers) are considered to have the most environmental impact, followed by plastic.

A MATTER OF CHOICE

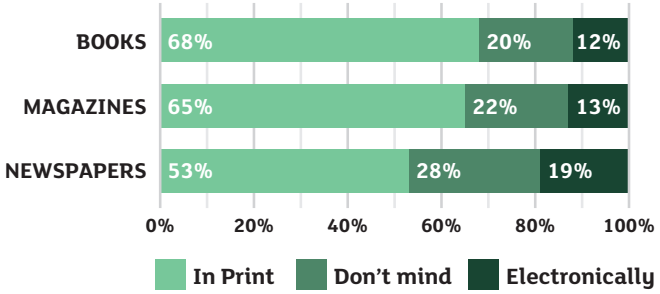
In today's digital world, the power of print on paper is becoming more apparent than ever. Consumers throughout the U.S. prefer reading in print, with many understanding the importance of "switching off" their digital devices. Consumers also feel strongly about their right to receive paper statements and bills from their banks, governments and other service providers. Efforts by corporations to save costs and push their customers to go digital, often citing environmental claims, do not reflect U.S. consumer preferences and opinions.

49% of U.S. consumers believe they spend too much time on electronic devices, and over half (53%) are concerned that the overuse of electronic devices could be damaging to their health.



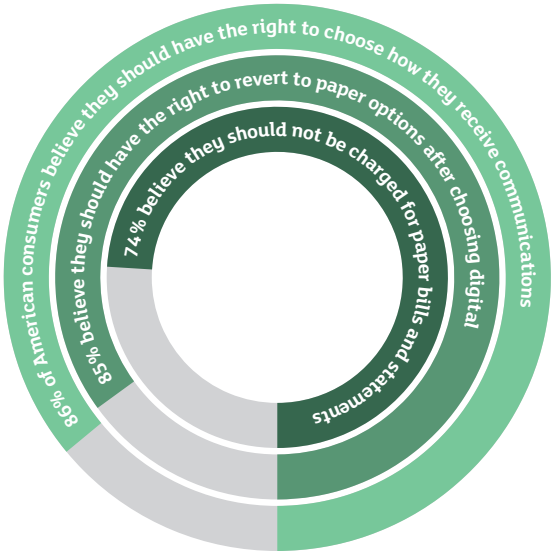
Although only 31% of the survey respondents feel they are suffering from "digital overload", there is a clear preference among Americans to enjoy the offline world, with 71% believing in the importance of "switching off" and reading more in print. When compared to digital, print is also considered the most enjoyable way to read books (68%), magazines (65%) and newspapers (53%).

Which format is the most enjoyable way to read...



Financial institutions, utility companies, telecoms and governments are increasingly encouraging their customers to go "paperless", often citing environmental claims about paper (ex: go green, save trees). However, 61% of U.S. consumers believe the real motivation behind the drive to digital is to save costs.

Switching to digital is not always welcome, as many consumers prefer paper-based communication.



Overall, 86% of U.S. consumers believe they should have the right to choose how they receive communications (printed or electronically) from financial organizations and service providers. A further 74% believe they should not be charged more for choosing paper bills and statements.

Giving customers fair, easy and free access to paper billing is especially important when considering the benefits print brings to financial literacy. 56% of U.S. consumers find it easier to manage their finances when printed on paper.

74% of respondents are concerned that their personal information held electronically is at risk of being hacked, stolen, lost or damaged. These doubts about cyber security may also explain why 73% of respondents keep hard copies of important documents filed at home, as they believe this is the safest and most secure way of storing their information.

What is also clear from the survey is that consumers strongly value their right to choose. This includes their right to revert to paper-based communications even after switching to digital – 85% believe they should have this right.

Service providers should consider the risk they take when switching their customers to digital without consent. Almost half (45%) of consumers would consider switching to an alternative service provider if they were forced to go paperless.

BUSTING THE MYTHS

When it comes to the sustainability of print and paper, it's important to separate the facts from myths. The U.S. print and paper industries have made great strides when it comes to sustainably sourced raw materials, renewable energy use and paper recovery rates. However, many myths about paper and its impact on the environment are prevalent among consumers.

THE MYTH

58%

58% of U.S. consumers believe U.S. forests are shrinking

THE FACTS

- Since the year 2000, U.S. forests have had a net growth in area equivalent to more than 1,500 NFL football fields per day, or about 800,000 acres per year.[1]
- The income landowners receive for trees grown on their land is an important incentive to maintain their land in forests, especially given the many economic pressures to convert forestland to non-forest uses.[16]

THE MYTH

36%

believe paper is a wasteful product

THE FACTS

- Paper is one of the most recycled materials with 68.1% of paper being recovered in the U.S.
- Over 40% of the wood fiber used for U.S. papermaking comes from wood by-products (sawmill chips and forest residues) as opposed to whole trees.[21]

THE MYTH

60%

believe electronic communication is better for the environment

THE FACTS

- The ICT industry accounts for around 2.5-3% of global greenhouse gas (GHG) emissions and this is predicted to rise to 14% by 2040.[17]
- Phones accounted for 435,000 metric tonnes of e-waste in 2016.[18]

THE MYTH

29%

believe paper production is a major cause of global GHG emissions

THE FACTS

- The pulp, paper and print industry is one of the lowest contributors to the global greenhouse gas inventory with 1% of total global GHG emissions.[19]
- The U.S. pulp and paper sector is one of the lowest emitters of GHG emissions among major U.S. industrial sectors at 1.2% of total U.S. industrial GHG emissions.[20]

THE MYTH

54%

believe only recycled paper should be used to make paper products

THE FACTS

- Wood fiber from well managed forests is essential to papermaking because recycled fiber breaks down after each use and can only be re-used 5-7 times.
- Without a continual input of wood fiber, the global paper cycle would stop in 6 to 18 months depending on the paper grade.[13]

FIND OUT MORE

Version 4 of the Two Sides Myths & Facts booklet is now available. Download the booklet here:
www.twosidesna.org/myths-and-facts-booklet

Or request a free printed version:
info@twosidesna.org

Members of Two Sides have exclusive permission to personalize the booklet and all other Two Sides materials.

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