Survey Headlines

➔ 10 countries

➔ USA, UK, France, Germany, Italy, Finland, Austria, Portugal, The Netherlands and Spain

➔ 5,000 online interviews, 500 per country using the IPSOS Consumer Panel

➔ Split by gender, age and religion
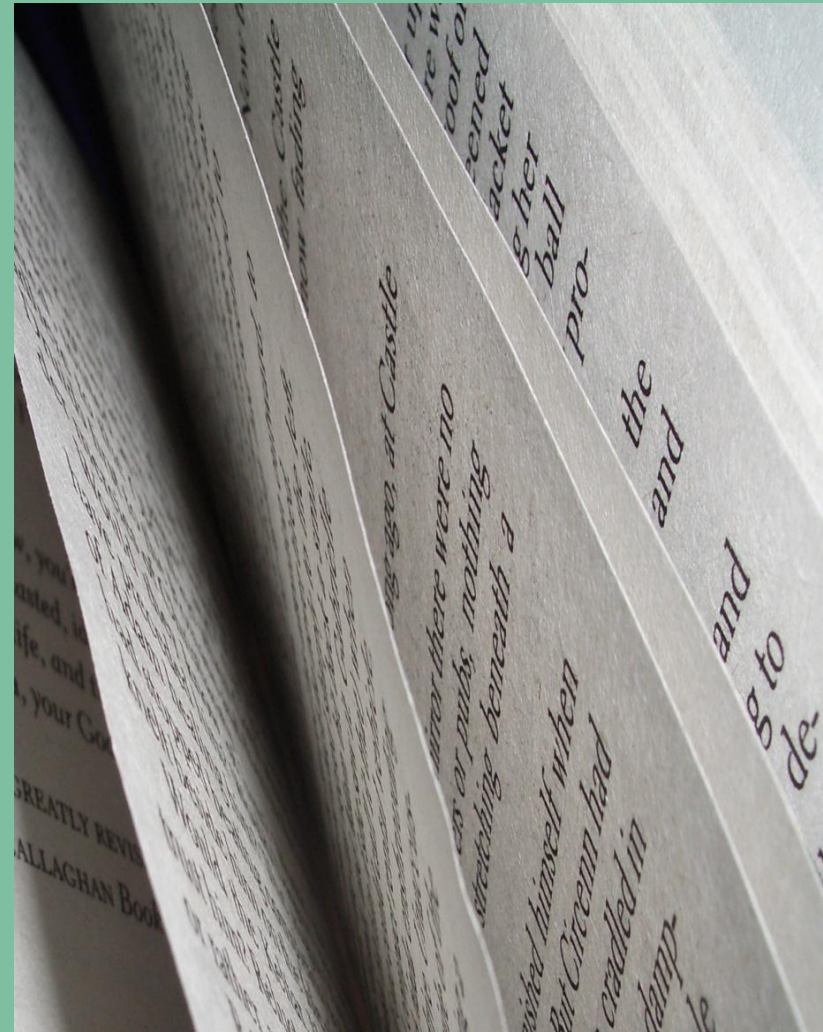
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Purpose

➢ To discover the strength and extent of public opinion about the effectiveness and environmental impact of print and paper

➢ To discover how such opinions may be playing a part in the reduction of use of print media as consumers are attracted to new media channels
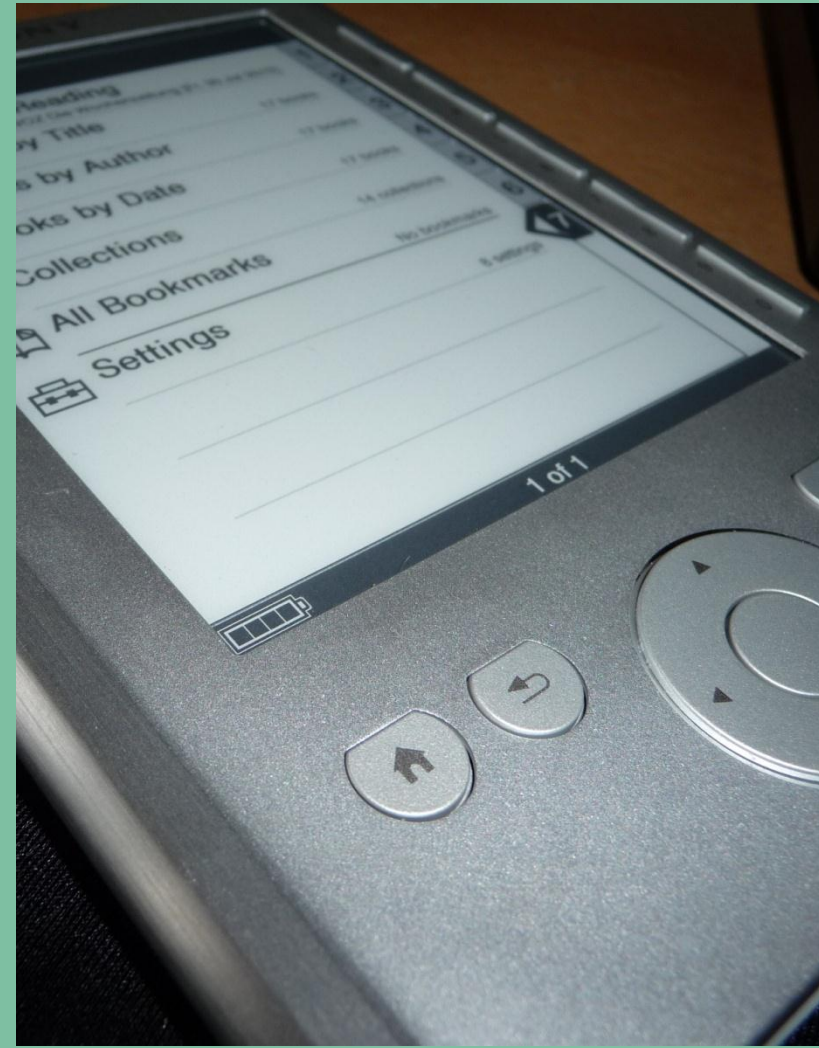

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Outcome

➤ Research delivers valuable insights for future initiatives that aim to counter negative attitudes related to the use and sourcing of paper and print.

➤ Provide background material to be used in publicizing print and paper's attractiveness and sustainability

U.S. Results

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Consumers prefer paper and see it as a sustainable way to keep records

Consumers like paper, including the younger generation

➔ 70% prefer reading from paper (69% of 18 -24 yr olds)

➔ 68% believe that paper is more pleasant to handle & touch than other media (66% of 18-24 yr olds)

➔ 67% agreed that paper records are more sustainable than electronic storage (65% of 18–24 yr olds)

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And for important documents, consumers want them on paper

How would you like to keep important documents?

➔ 70% prefer to keep important documents on paper (68% of 18-24 yr olds)

➔ 18% prefer to keep them electronically

➔ 12% have no preference
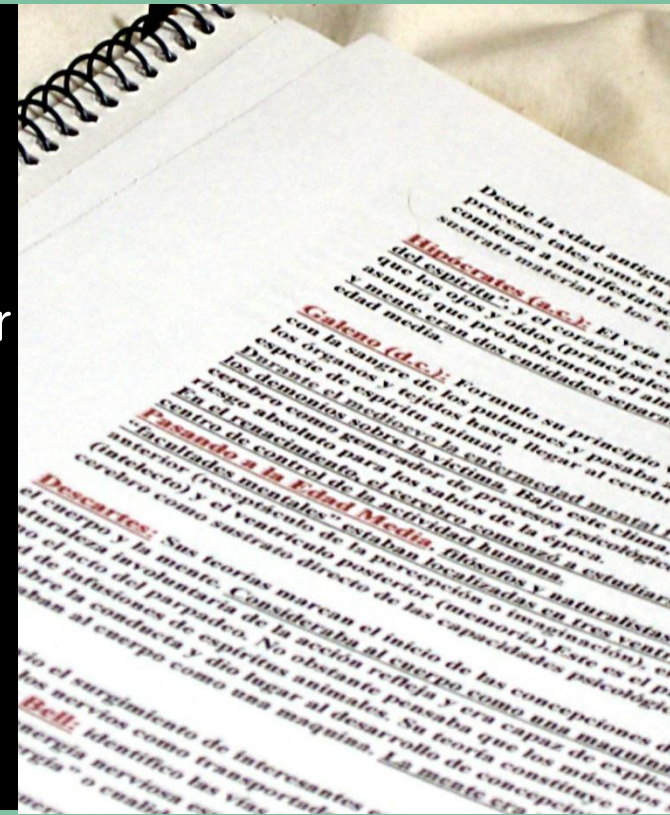
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Consumers want recyclable and renewable products but they need more information about print and paper

Recycling and renewability issues

➔ 96% see recyclability as a sign of environmentally responsible products

➔ 65% understand that print and paper is based on a renewable resource

➔ 56% believe that the industry has an average to above average recycling record

➔ Consumers think that recycling rates in the US are 20 - 40% (the actual rate is over 63%)

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Is deforestation a consumer concern?

Drivers of consumer concerns

➔ 55% said unemployment and jobs are their main concerns

➔ 10% are concerned about threats against the environment (but 21% of 18-24 yr olds)

➔ 3% consider deforestation as the most worrying issue today

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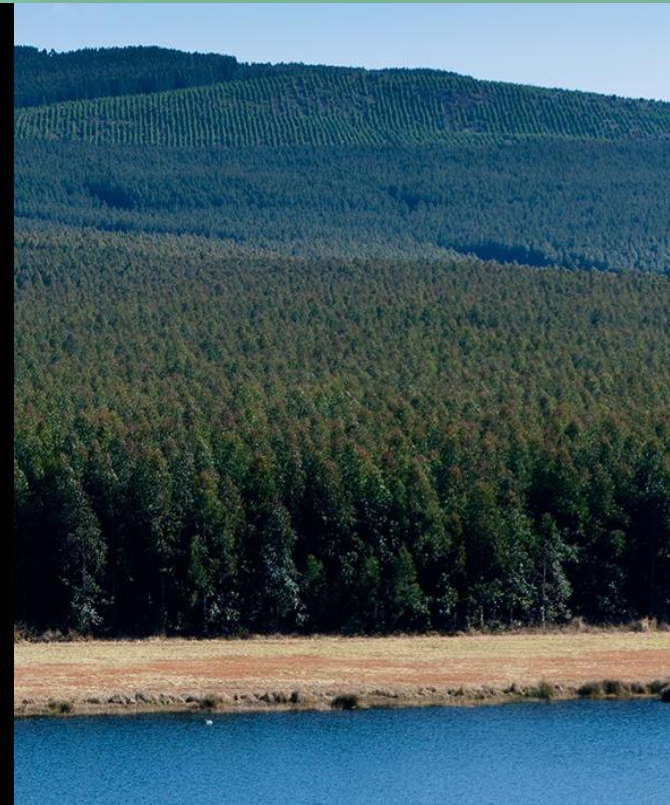www.twosides.us

Consumers need more information on the state of US forests and sustainable forestry

Misleading perceptions continue

➔ 65% of consumers believe US forests have reduced in size over the last 50 yrs

(Actual: US forest area has remained stable for the past 100 years, and growing volume has increased by 49%) (1)

➔ 36% consider construction and building to have the greatest impact

➔ 18% consider paper to have the greatest impact on forests

➔ 20% are unsure

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There is a belief that forests are under threat from the use of paper

Paper and Forests

➡ 71% believe that there is a connection between paper manufacture and loss of tropical rainforest (85% of 18-24 yr olds)

(Actual: Tropical deforestation (permanent loss / conversion of forestland) is caused primarily by agriculture or domestic fuel requirements) (2)

➡ 69% are concerned about paper's effect on forests (76% of 18-24 yr olds)

➡ However, 88% agree that new forest plantations are necessary to counteract global warming

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E-communication is considered more environmentally-friendly

What is the most environmentally-friendly way to read?

	Electronically	On Paper
Books	56%	18%
Newspapers	64%	12%
Magazines	58%	16%
Mail	58%	12%

➔ 79-85% of 18-24 yr olds chose electronic as the most environmentally-friendly way

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E-communication - Facts

- The direct impact of ICT products and services replacing paper is far from negligible, and the trade-off between the two "technologies" depends on conditions such as use frequency, source of energy, end-of-life management of the products (3).

- With a reading time of 30 minutes/day, the environmental impact of a web based newspaper was in general in the same range as the printed newspaper environmental impact (4).

- "Going paperless saves trees" can be misleading because it may be perceived that paper causes deforestation, i.e. the permanent removal of forest. In the US, the paper industry encourages and depends on sustainable forest management practices that regenerate billions of trees annually (5).

- We may actually learn better from a book, newspaper, or printed report than we do using a computer screen (6).

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Print Media needs to promote its sustainability

Impact of advertising is limited, but effective

➔ Only 12% of consumers have seen advertisements promoting the environmental sustainability of print media

➔ 83% believed the ads were credible and 88% found them useful

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Lessons to be learned

➔ Paper is still the preferred information medium for reading and storage of documents – all ages.

➔ 18-24 year olds appear to appreciate paper as much as older age groups.

➔ Paper is not seen as an environmentally friendly way to read.

➔ Unemployment and jobs are the main drivers of concern in the U.S. [including threats to the print and paper supply chain].

➔ More education and communication is needed on the link between print, paper and sustainable forest management [rather than deforestation].

➔ Print and Paper is seen as a renewable resource, but this needs reinforcement.

➔ Consumers like recyclable products and need a better understanding of the industry's good record.

➔ Informative marketing is needed and can be influential.

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Consumers' Environmental Perceptions of Print & Paper

References (all documents are available upon request):

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