

Global Study: Most People Highly Value Paper and Print

Recently commissioned by Two Sides, this consumer survey reports global attitudes toward paper and print, as well as toward corporate environmental claims.

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For the paper and print industries, global markets and consumer preferences remain widely diverse and difficult to predict—yet there is at least one major source of agreement: Around the world, people like and want print on paper. This is a central finding of a study gauging attitudes toward the use, attractiveness, and environmental sustainability of print and paper. The study was commissioned by Two Sides, a nonprofit association working to promote the responsible production and use of print and paper. (See sidebar for additional resources.)

To support its initiatives, Two Sides commissioned Toluna Inc. to conduct a 10-country survey in June, 2016 on The Attractiveness and Sustainability of Print and Paper. More than 7,000 consumers were surveyed globally to provide insight into opinions on the environmental impacts of digital versus paper-based communications, and views on corporate initiatives forcing people into digital-only communication by eliminating paper-based options.^{1,2,3,4,5,6} Survey data was split by five different age groups, from the age of 18 to 55 and over.



Individuals working in the paper, printing, or allied industries were excluded from the survey.

A SUSTAINABLE WAY TO COMMUNICATE

Survey results showed that 88-91 percent of respondents agreed that, when responsibly produced, used and recycled, print and paper can be a sustainable way to communicate (see Fig. 1.) Likewise, 85-89 percent agreed that, when forests are responsibly managed, it is environmentally acceptable to use trees to produce products such as wood for construction and paper for printing.

These results were very similar across the countries and regions surveyed, suggesting that print and paper products are trusted

as long as people believe they are manufactured and used responsibly. In other words, recycling and the use of sustainable forestry practices are likely important factors.

In general, people recognize the positive environmental attributes of paper, with 94-97 percent agreeing that recyclability is an important characteristic of environmentally responsible products. Likewise, 61-76 percent agreed that paper is based on a renewable resource, and 86-94 percent agreed that new forest plantations are necessary to counteract global warming.

In the US and Europe, there is an opportunity to educate the public about sustainable forestry and the state of forests. Despite the fact that in both the US and Europe forest area has grown in volume in the past 50 to 60 years^{7,8}, 74-76 percent of respondents believed that forests have stayed the same or decreased in size. Only 5-11 percent responded that they have increased in size. Concerns about forestry persist in all five countries or regions surveyed, with 73-78 percent of respondents being concerned about the effect on forests by the production of paper.

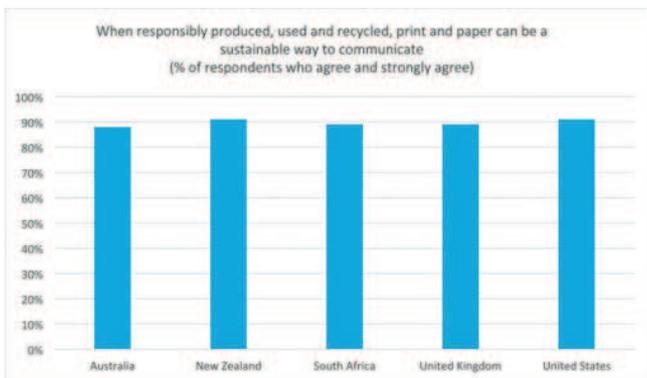


Fig. 1

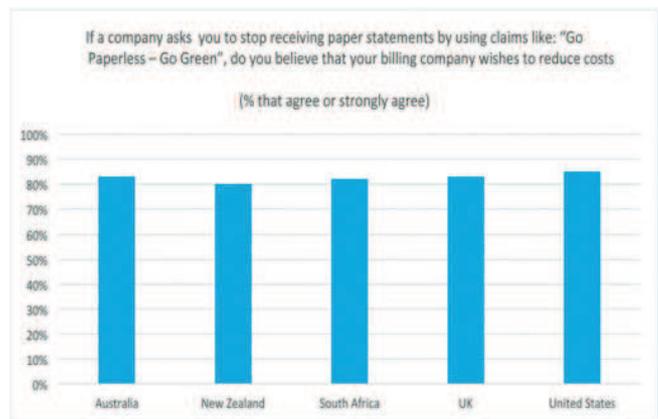


Fig. 2

The majority of respondents did not know that paper is one of the most recycled products in their country or region, with recovery rates over 65 percent in all regions or countries surveyed. For example, 64-73 percent of respondents believed that less than 50 percent of waste paper is recovered for recycling, and only 5-9 percent believed it tops 60 percent.

MANY QUESTION 'GO PAPERLESS' CLAIMS

There is consumer cynicism related to “go green” claims used by corporations and governments to promote electronic statements and services over paper-based communications. The majority of respondents (80-85 percent) receiving environmental claims such as, “Go Paperless – Go Green”, or “Go Paperless – Save Trees” believe companies are merely seeking to save costs (see Fig. 2.)

The percentage of respondents that question the validity of these claims ranged from 29 to 57 percent, with the highest responses being recorded in the US (57 percent) and the UK (50 percent), and the lowest in South Africa (29 percent).

CHOOSING THE PAPER OPTION

In terms of reading preference and tactile experience, people prefer print on paper compared to reading from screen or electronic devices. The surveys showed that 64-80 percent of respondents agree that reading from paper is nicer than reading off a screen (see Fig. 3.) As well, 71-79 percent enjoy the tactile experience of paper and print and agree that, compared to other media, print on paper is more pleasant to handle and touch.

Results indicate that many consumers want to retain the choice of receiving paper statements at no additional cost. For example, 62-79 percent of respondents want the

option to continue receiving printed information because it provides a more permanent record. Not surprisingly, 72-77 percent would be unhappy if they were asked to pay a premium for paper bills and statements.

In addition, a surprising 29-49 percent of respondents reported that they don't have a reliable internet connection and want paper records. These results suggest that millions of people in all regions surveyed still rely heavily on print and paper for their communications. However, these results should be considered gross estimates, given that the survey was conducted online in all countries and regions.

In the UK, the US, and South Africa, 14-35 percent of respondents indicated that they have seen ads related to the effectiveness or environmental friendliness of print and paper. In Australia and New Zealand, 29-30 percent of consumers surveyed have heard about the environmental friendliness of paper and print. In all cases, the majority of respondents believe the information to be useful (81-92 percent) and credible (78-95 percent).

TRENDS

In the UK and the US, 2016 survey results were compared to results obtained in 2011 and 2013, and some positive trends emerged related to the overall environmental acceptance and understanding of print and paper.^{9,10,11} For example, when consumers were asked “Which is the most environmentally friendly way to read (print on paper or electronically)?”, the following differences were noted between 2011 and 2016:

- For books and magazines, a 2-4 percent increase in favor of paper.
- For newspapers and direct mail, a 6-14 percent increase in favor of paper.

There was also an 18 to 19 percent increase in respondents agreeing that print and paper

can be a sustainable way to communicate when used and produced responsibly (2013 vs 2016).

Improvements in perception about paper and print may be due to consumer ad campaigns operating in the UK and the US focused on the sustainability and benefits of print and paper. These include the *No Wonder You Love Paper* campaign operating in Europe and the *Paper and Packaging Board - How Life Unfolds* campaign in the US.¹² Between 2013 and 2016, US survey results show that roughly three times more respondents saw ads related to the effectiveness and sustainability of print and paper (35 percent in 2016 vs. 12 percent in 2013), and the large majority rated the ads as credible and useful.

In the US, a more detailed analysis of the data showed that younger age groups (under 45) had a stronger acceptance of digital media than older age groups (over 45), but there is a resistance to being unwillingly moved to online communications. In addition, the level of awareness of 18- to 24-year-olds was generally lower than the overall survey results for questions regarding recycling and the state of forests.

CONCLUSIONS

There is a clear preference for print on paper across all countries and regions, likely indicating a more fundamental and human way that people react to the physicality of print on paper. Many prefer paper-based communications to digital options for a variety of reasons, including ease of reading, tactile experience, and a lack of internet access. These findings may also be partially explained by neuroscientific studies that have shown that our brains have a much more emotional and meaningful connection when we read on paper versus screens.^{13,14}

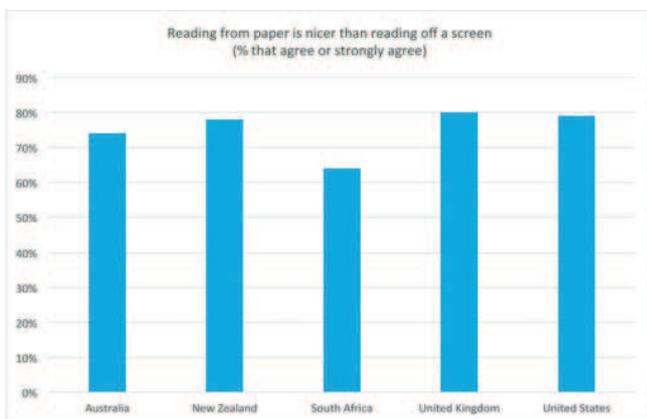


Fig. 3



Survey findings may be partially explained by neuroscientific studies that show our brains have a much more emotional connection when we read on paper.