
The Attractiveness and Sustainability of Print and Paper – The U.S. Consumer’s view

A Two Sides Survey of U.S. Consumers conducted by Toluna Inc., June 2016

As the world of communication continually shifts towards digital, many consumers are being given a message that this is better for the environment.

Corporations and governments are increasingly driving communications online and either withdrawing paper-based documents such as bills and statements, charging consumers who wish to receive them, or making paper more difficult to access.

This survey provides an insight into how consumers view the above initiatives including the environmental impacts of digital versus paper-based communications and how they perceive and use paper in their daily lives.

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Executive Summary

The survey was commissioned by Two Sides and carried out by international research company Toluna in June 2016. The survey was undertaken in Australia, Austria, Brazil, France, Germany, Italy, New Zealand, South Africa, Spain, the United Kingdom and the United States. Individuals working in the paper, printing or allied industries were excluded from the survey.

This report details the responses from 2,323 U.S. consumers and gives an insight into their perceptions related to the environmental impacts of print and paper. It considers the ongoing switch from paper-based communications to digital by corporations and governments, and reveals that many consumers want to retain the choice of using print and paper at no additional cost.

Many respondents question or feel misled by “go paperless – go green” or similar environmental claims and believe cost savings is the primary reason that organizations are going digital.

Although there are concerns about the environmental impacts of print and paper, many respondents prefer paper-based communications to digital options for a variety of reasons including ease of reading and a lack of internet access. A large majority recognize that paper-based communications can be a sustainable way to communicate when produced and used responsibly, including recycling.

More education is needed to raise awareness about the industry’s positive environmental message related to sustainable forest management and recycling. For example, despite U.S. forests growing in size (over 3% in forest area and 58% in wood volume over the past 60 years), 55% of respondents perceive that U.S. forests are shrinking. The majority of respondents do not know that paper is one of the most recycled products in the U.S. with recovery rates of over 66%.

There is a preference for print on paper in all age groups, indicating a more fundamental and more human way that we react to the physicality of print on paper. However, the acceptance of digital media is stronger amongst younger ages. One alarming trend was that the 18 to 24 year old age group had a lower awareness of the state of U.S. forests and recycling rates for paper when compared to overall survey results.

Compared to the 2011 and 2013 Two Sides surveys, the following positive trends are apparent:

- 94% agreed that print and paper can be a sustainable way to communicate (compared to 72% in 2013).
- 79% agreed that reading from paper is nicer than reading off a screen (70% in 2011).
- 76% agreed that print on paper is more pleasant to handle and touch when compared to other media (68% in 2011).
- 76% agreed that paper is based on a renewable resource (65% in 2011).
- When it comes to home printing of bills and statements, 2016 results were either higher (more printing) or similar to our 2013 survey.
- 30% believe that our forests have either stayed the same or increased in size (16% in 2011).
- 8% believe that paper products have the highest recycling rate in the U.S. when compared to other materials such as glass, plastic and metals (4% in 2011).
- 35% saw ads related to the effectiveness and sustainability of print and paper (12% in 2013), and the large majority rated the ads as credible and useful.

Key Findings:

“Go paperless – go green” claims are questioned by many

There is consumer cynicism related to environmental claims used by corporations and governments to promote electronic statements and services. Cost savings is seen as the main driver. Millennials were less doubtful of green claims than older age groups.

- 85% of respondents receiving environmental claims such as, “Go Paperless – Go Green”, or “Go Paperless – Save trees” believe companies are seeking to save costs (75% of 18 to 24 year olds).
- 57% question the validity of these claims (48% of 18 to 24 year olds).

Print and paper are seen as sustainable products when responsibly produced but concerns about forestry persist

Print and paper is still a preferred communication channel. Although many are concerned about the effect of paper production on forests, they understand the renewable and recyclable characteristics of paper and believe it can be a sustainable way to communicate. Although the results for 18 to 24 year olds were generally lower, they still indicated a strong acceptance of paper and print.

- 94% agreed that recyclability is an important characteristic of environmentally responsible products (91% of 18 to 24 year olds).
- 91% agree that, when responsibly produced, used and recycled, print and paper can be a sustainable way to communicate (86% of 18 to 24 year olds).
- 88% agree 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 (81% of 18 to 24 year olds).
- 86% agreed that new forest plantations are necessary to counteract global warming (80% of 18 to 24 year olds).
- 79% agreed that reading from paper is nicer than reading off a screen (79% of 18 to 24 year olds).
- 78% are concerned about the effect on forests by the production of paper (also 78% of 18 to 24 year olds).
- 76% agreed that paper is based on a renewable resource (66% of 18 to 24 year olds).
- 76% agreed that print on paper is more pleasant to handle and touch when compared to other media (73% of 18 to 24 year olds).
- 56% agree that paper records are more environmentally sustainable than electronic storage of information (45% of 18 to 24 year olds).

Many need a paper option and don't want to be forced into a “digital only” situation

There is a resistance to being unwillingly moved to online communications. However, results indicate that 18 to 24 year olds are more likely to accept online communications than older age groups.

- 79% of respondents want the option to continue receiving printed information as it provides a more permanent record (75% of 18 to 24 year olds).
- 77% would be unhappy if they were asked to pay a premium for paper bills and statements (70% of 18 to 24 year olds).

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- 49% of all respondents still don't have a reliable internet connection and want paper records (44% of 18 to 24 year olds).

Home printing continues

Online statements and billing are well established, however a significant amount of home printing for various bills and statements still occurs. For example, 52% of respondents print some or most of their financial services bills and statements at home. No major differences were found between the average result and the 18 to 24 year old group. Depending on the type of document printed, the 2016 results were either higher (more printing) or similar to our 2013 survey.

Forest growth in the U.S. is misunderstood, but more people are getting it right

55% of respondents believe that U.S. forests have decreased in area (62% of 18 to 24 year olds). Most respondents are unaware of the fact that U.S. forests have grown by more than 58% in volume and 3% in area over the last 60 years. The level of awareness of 18 to 24 year olds was generally lower than the overall results. There is a positive trend compared to our 2011 survey, with roughly double the 2016 respondents believing that our forests have either stayed the same or increased in size (i.e. 16% in 2011 vs 30% in 2016).

The great recycling story of print and paper is not well known

70% of respondents believe that less than 50% of waste paper is recovered for recycling (80% of 18 to 24 year olds). Most respondents are not aware that over 65% of U.S. paper products are recovered for recycling and they have a mixed opinion of the percentage of paper recovered. The level of awareness of 18 to 24 year olds was generally lower than the overall results. The 2016 results are similar to those obtained in our 2011 survey.

Paper products have the highest recycling rate in the U.S. when compared to other materials such as glass, plastic and metals. Although only 8% of respondents selected the correct answer, this is double the respondents compared to our 2011 survey (4%).

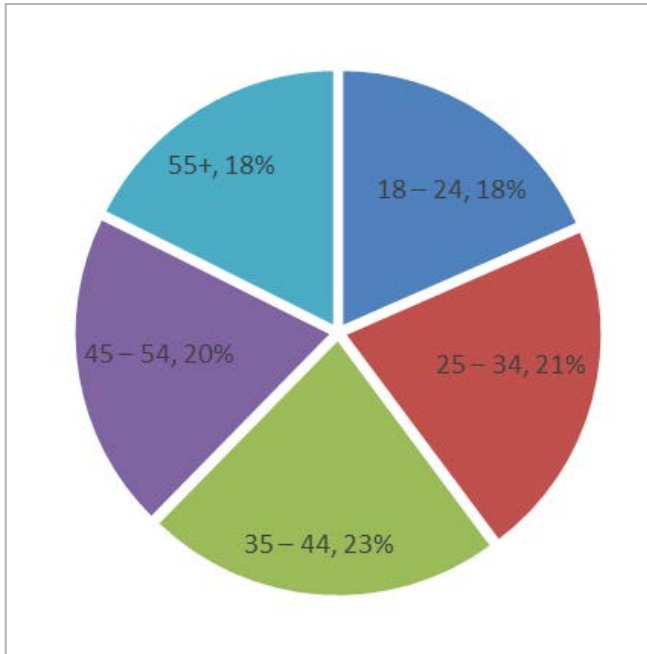
More people are seeing ads promoting print and paper

Over 35% of respondents indicated that they have seen ads promoting the effectiveness or environmental friendliness of print and paper. This is almost 3 times more respondents than in our 2013 survey (12%), and the large majority rated the ads as credible and useful.

The U.S. Survey

Sample size and breakdown

The survey was conducted in June 2016 by Toluna, an independent research organization and included 2,323 U.S. respondents. The split in each age range of consumers was as follows:

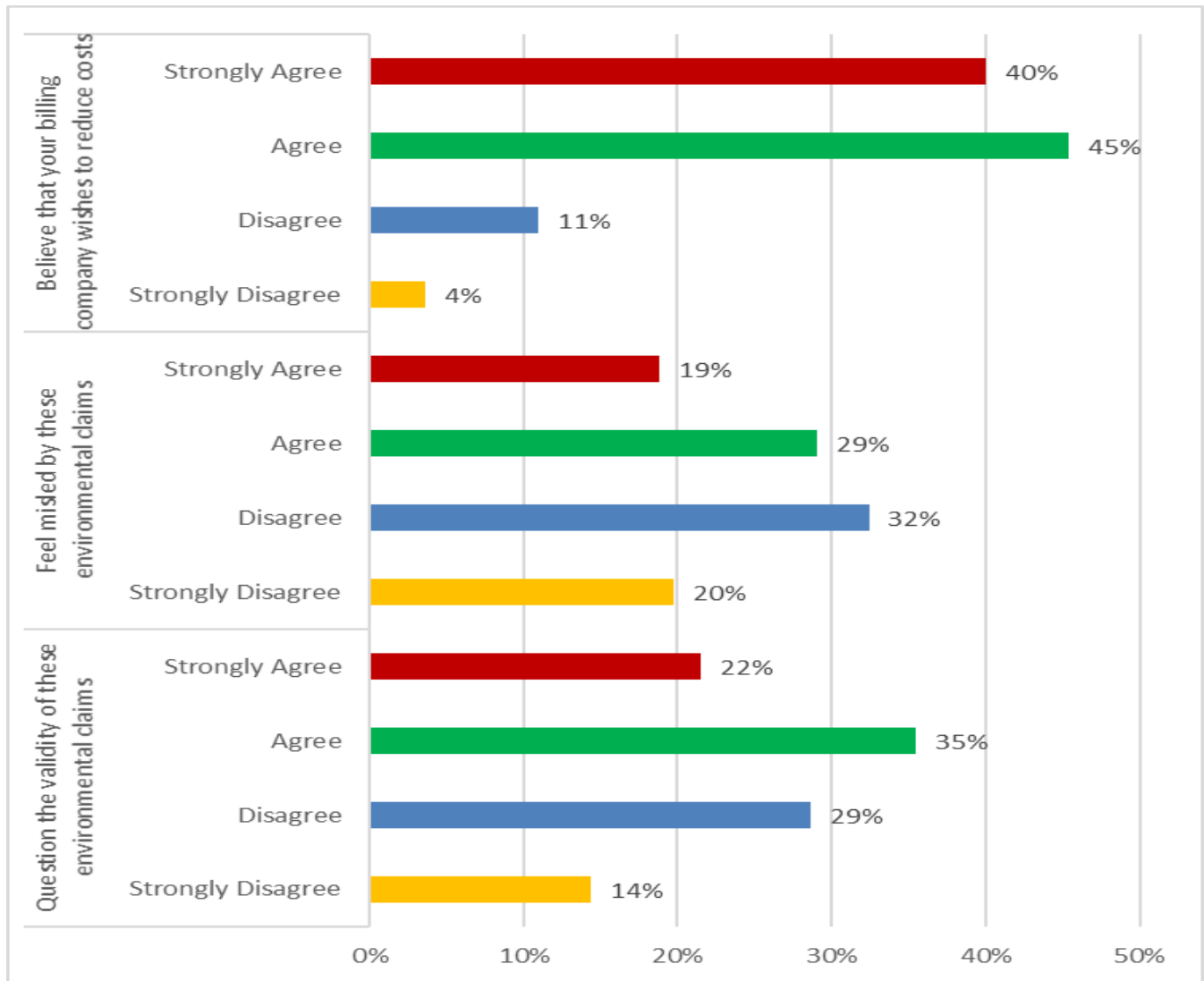


47% of respondents were male and 53% female. Individuals working in the paper, printing or allied industries were excluded from the survey.

Respondents were spread across the U.S.

Questions and Responses

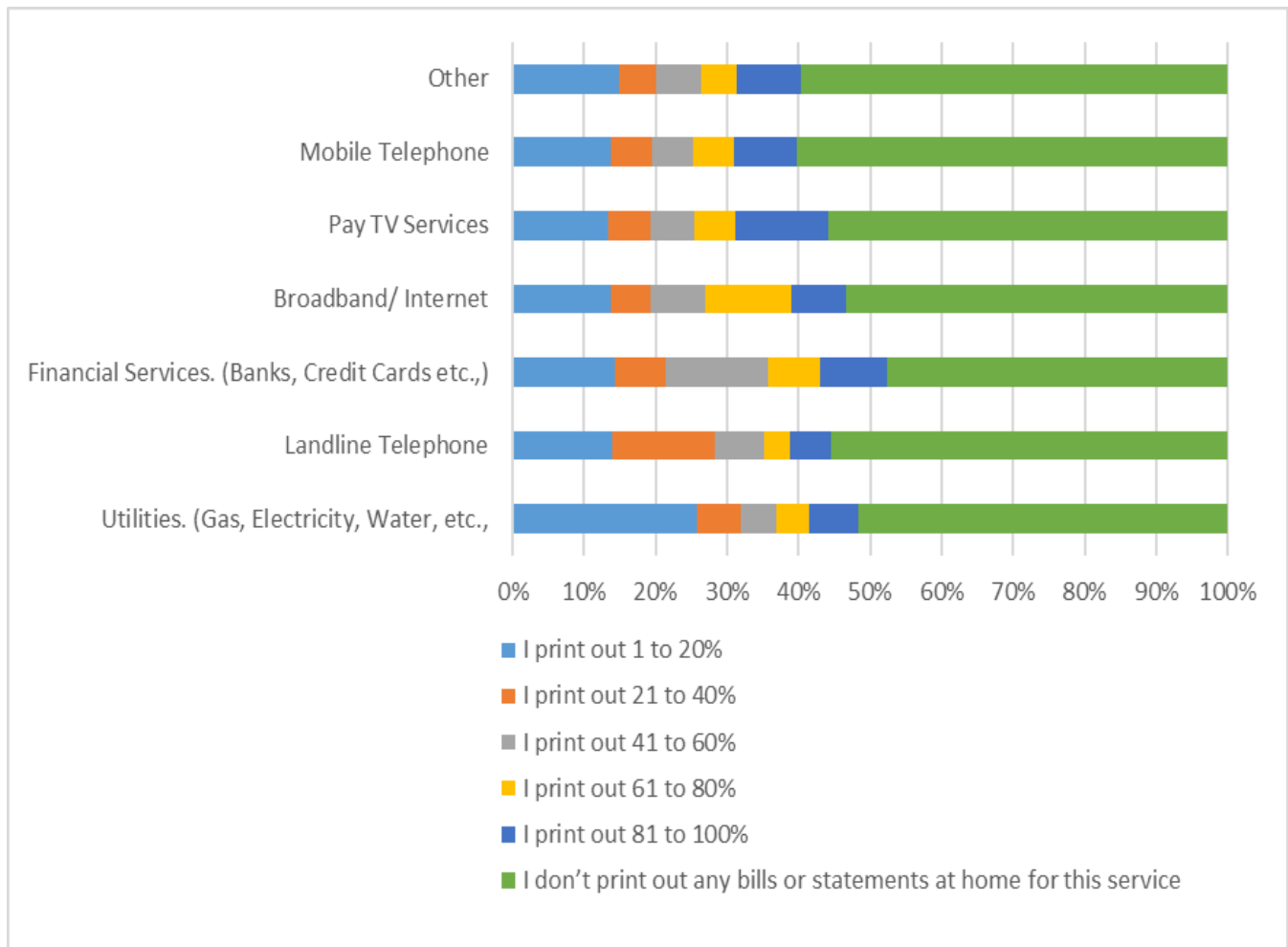
1. If you see a company asking you to stop receiving paper bills or statements by using environmental claims like; “Go Paperless – Go Green”, or “Go Paperless – Save trees”, or “Get your bills on line - it’s better for the environment” Do you:



There is consumer cynicism related to environmental claims used by corporations and governments to promote electronic statements and services. Cost savings is seen as the main driver. Millennials were less doubtful of green claims than older age groups.

- 85% of respondents receiving environmental claims like; “Go Paperless – Go Green”, or “Go Paperless – Save trees” believe companies are seeking to save costs (75% of 18 to 24 year olds).
- 57% question the validity of these claims (48% of 18 to 24 year olds).
- 48% feel misled by these claims (37% of 18 to 24 year olds).

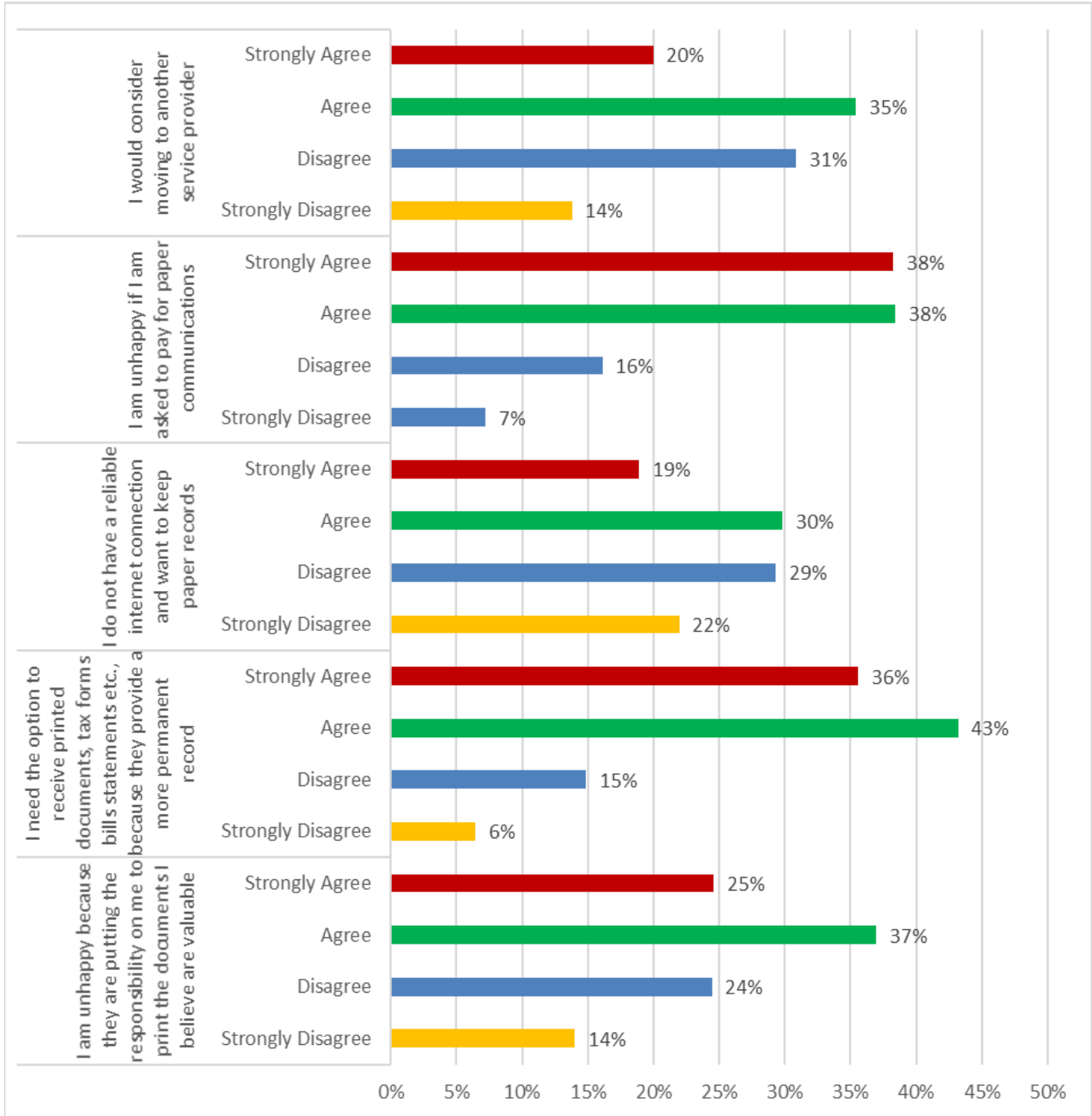
2. If you receive electronic bills and statements, what percentage do you print at home?



Online statements and billing are well established, however a significant amount of home printing for various bills and statements still occurs. No major differences were found between the average result and the 18 to 24 year old group.

- 13 to 26% of respondents print between 1 and 20% of their electronic statements at home, depending on the type of statement.
- 6 to 13% of respondents print between 81 and 100% of their electronic statements at home, depending on the type of statement.
- 52% of respondents print some or most of their financial services bills and statements at home.

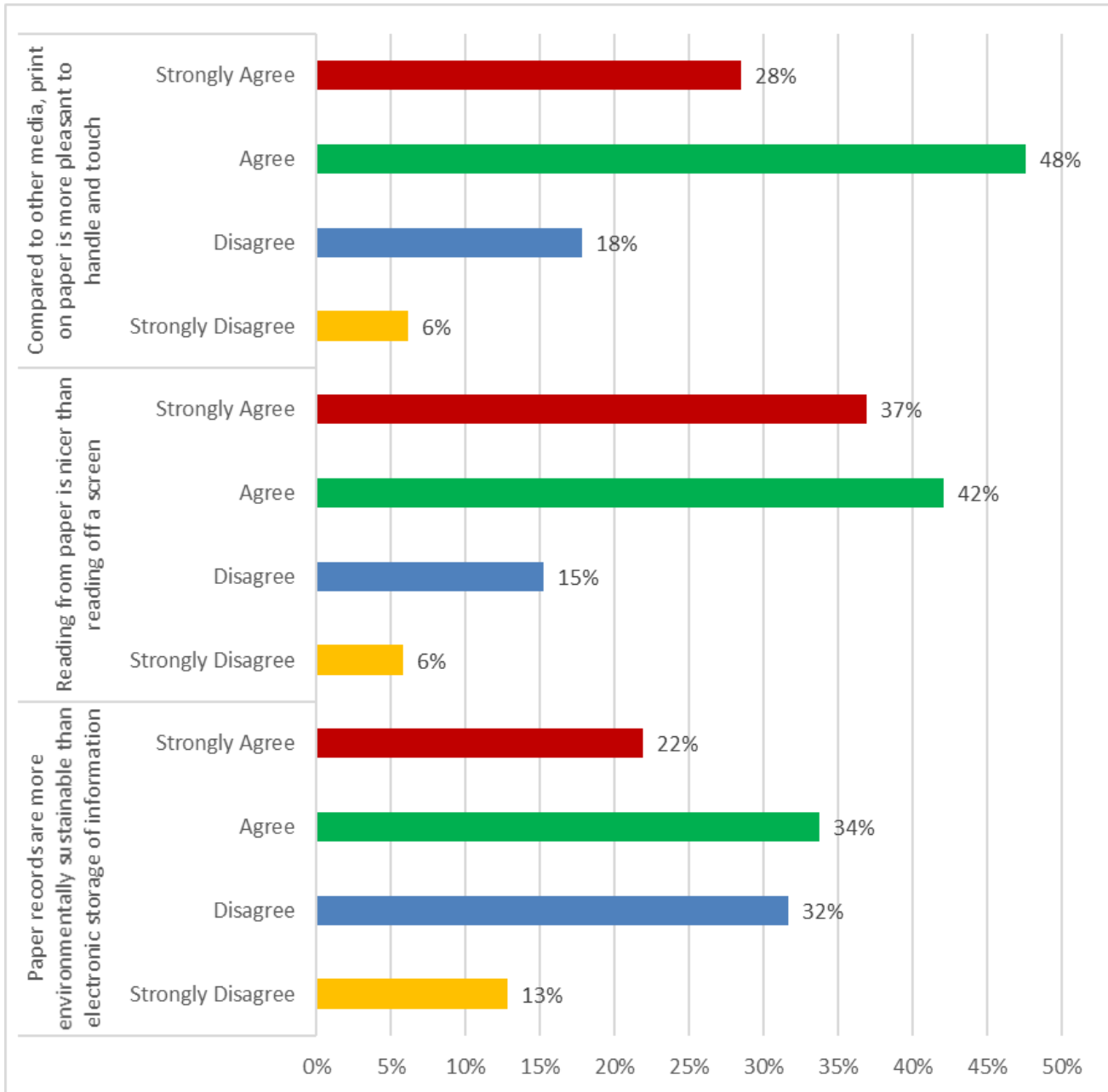
3. If you receive a communication from any of your service providers, or your tax authorities, that they want to move to online services (“paperless” communication only), please tell us to what extent you agree with the following statements:

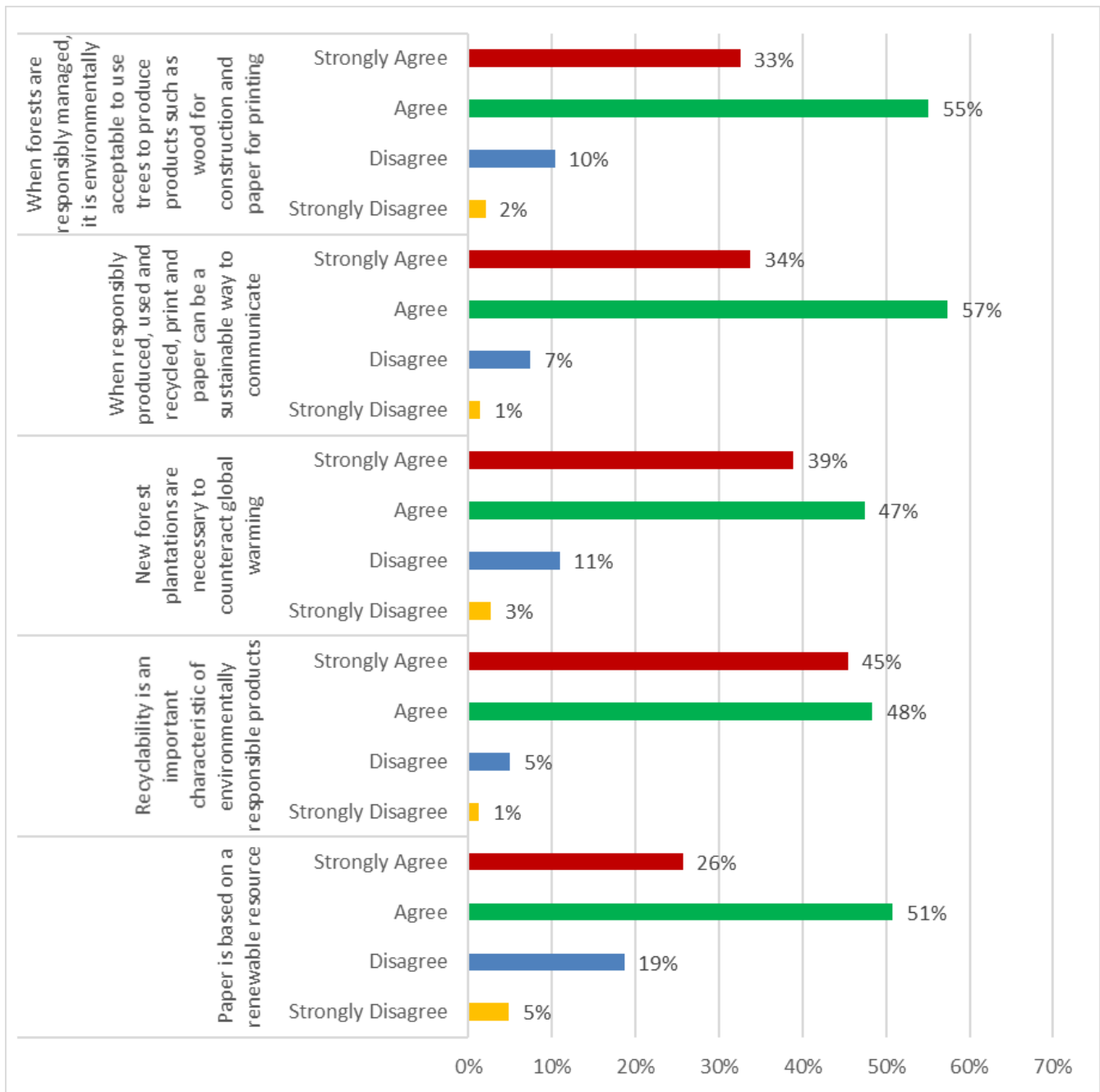


There is a resistance to being unwillingly moved to online communications. However, results indicate that 18 to 24 year olds are more likely to accept online communications than older age groups.

- 79% of respondents want the option to continue receiving printed information as it provides a more permanent record (75% of 18 to 24 year olds).
- 77% would be unhappy if they were asked to pay a premium for paper bills and statements (70% of 18 to 24 year olds).
- 62% are unhappy that the responsibility to print documents is being passed to consumers (57% of 18 to 24 year olds).
- 55% would consider changing provider if they are being asked to move to paperless communication (47% of 18 to 24 year olds).
- 49% of all respondents don't have a reliable internet connection and want paper records (44% of 18 to 24 year olds).

4. To what extent would you say you agree with the following statements?



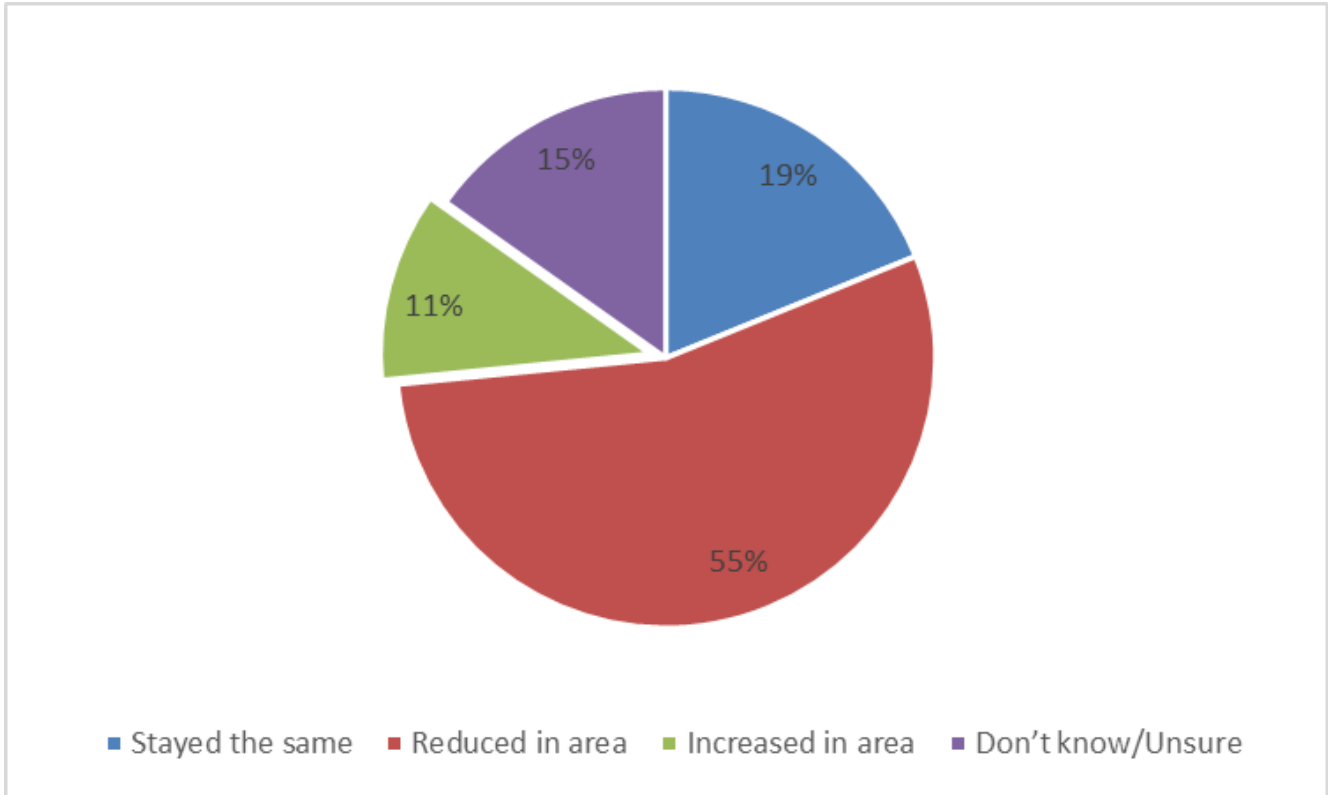


Print and paper is still a preferred communication channel. Although many consumers are concerned about the effect of paper production on forests, they understand the renewable and recyclable characteristics of paper and believe it can be a sustainable way to communicate. Although the results for 18 to 24 year olds were generally lower, they still indicated a strong acceptance of paper and print.

- 94% agreed that recyclability is an important characteristic of environmentally responsible products (91% of 18 to 24 year olds).

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- 91% agreed that, when responsibly produced, used and recycled, print and paper can be a sustainable way to communicate (86% of 18 to 24 year olds).
 - 88% 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 (81% of 18 to 24 year olds).
 - 86% agreed that new forest plantations are necessary to counteract global warming (80% of 18 to 24 year olds).
 - 79% agreed that reading from paper is nicer than reading off a screen (also 79% of 18 to 24 year olds)
 - 78% are concerned about the effect on forests by the production of paper (also 78% of 18 to 24 year olds).
 - 76% agreed that print on paper is more pleasant to handle and touch when compared to other media (73% of 18 to 24 year olds).
 - 76% agreed that paper is based on a renewable resource (66% of 18 to 24 year olds).
 - 56% agreed that paper records are more environmentally sustainable than electronic storage of information (45% of 18 to 24 year olds).

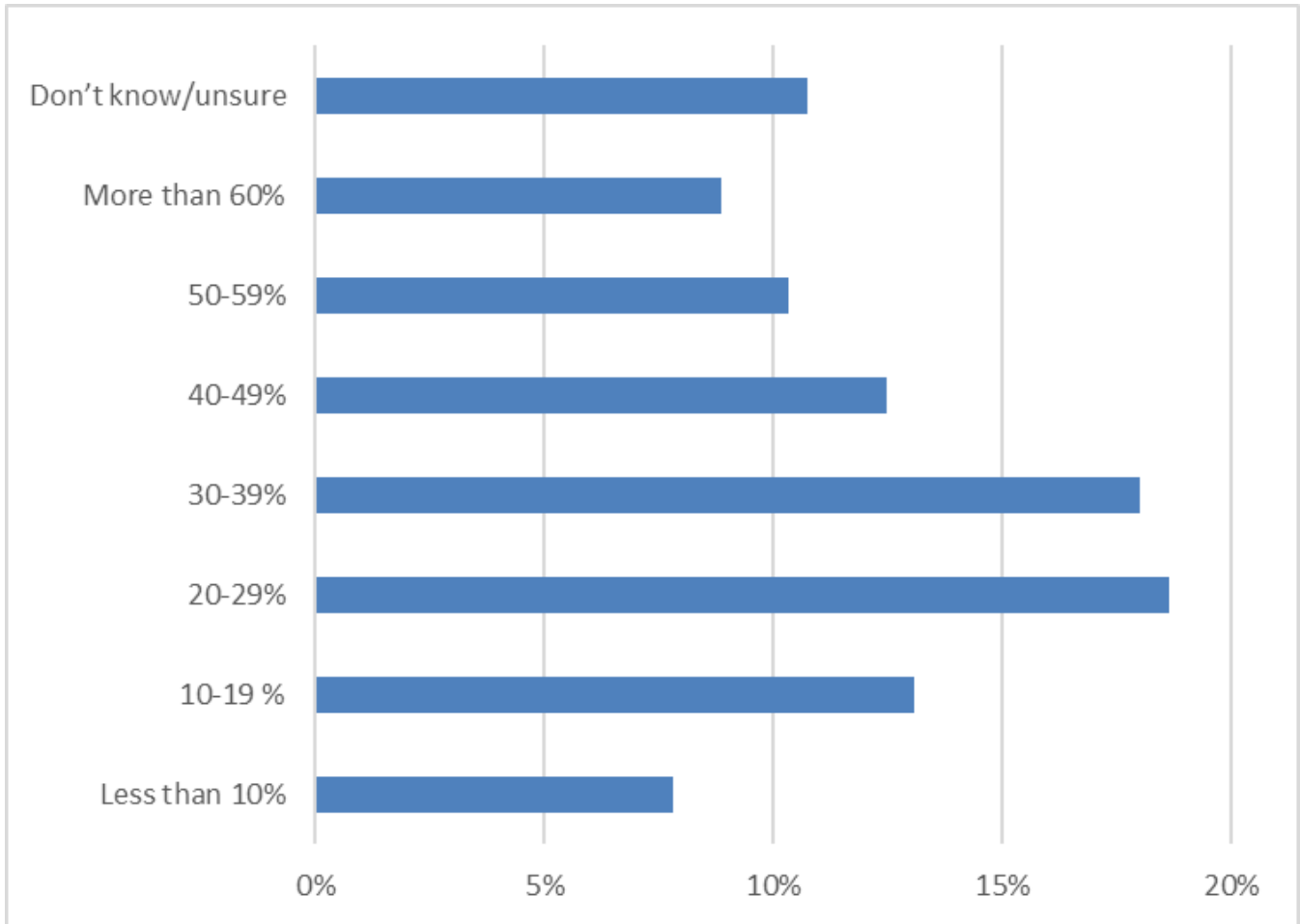
5. Over the last 50 years, how would you say that the size of U.S. forests has evolved?



Most respondents are unaware of the fact that U.S. forests have grown by more than 58% in volume and 3% in area over the last 60 years. The level of awareness of 18 to 24 year olds was generally lower than the overall results.

- 55% of respondents believe that U.S. forests have decreased in area (62% of 18 to 24 year olds).
- 19% believe they have stayed the same.
- 15% did not know or were unsure.
- 11% believe they have increased in area (8% of 18 to 24 year olds).

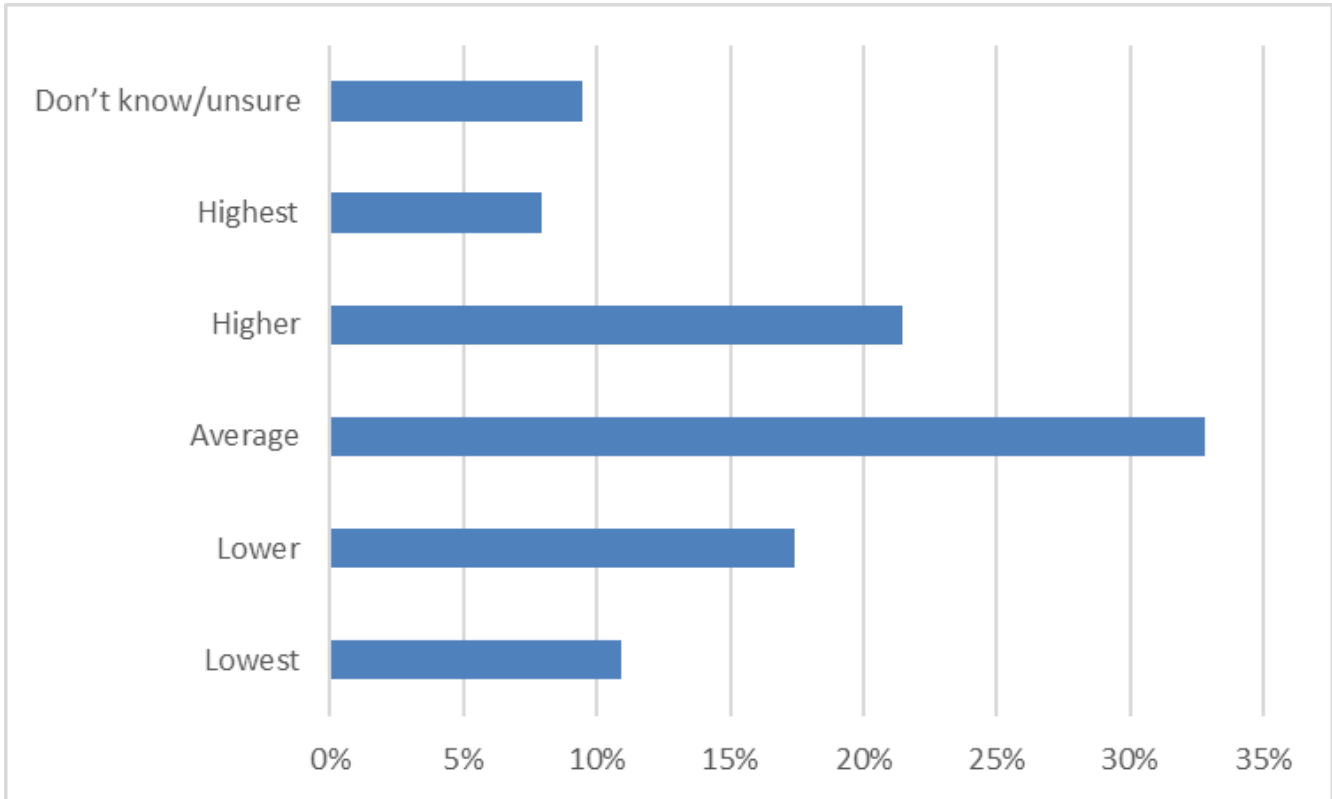
6. What percentage of paper do you think is recycled in the United States?



Most respondents are not aware that over 66% of U.S. paper products are recovered for recycling and they have a very mixed opinion of the percentage of paper recovered. The level of awareness of 18 to 24 year olds was generally lower than the overall results.

- 70% believe that less than 50% of waste paper is recovered for recycling (80% of 18 to 24 year olds).
- 10% believe that 50-59% if paper is recovered (7% of 18 to 24 year olds).
- 9% believe it is over 60% (4% of 18 to 24 year olds).
- 10% did not know or were unsure.

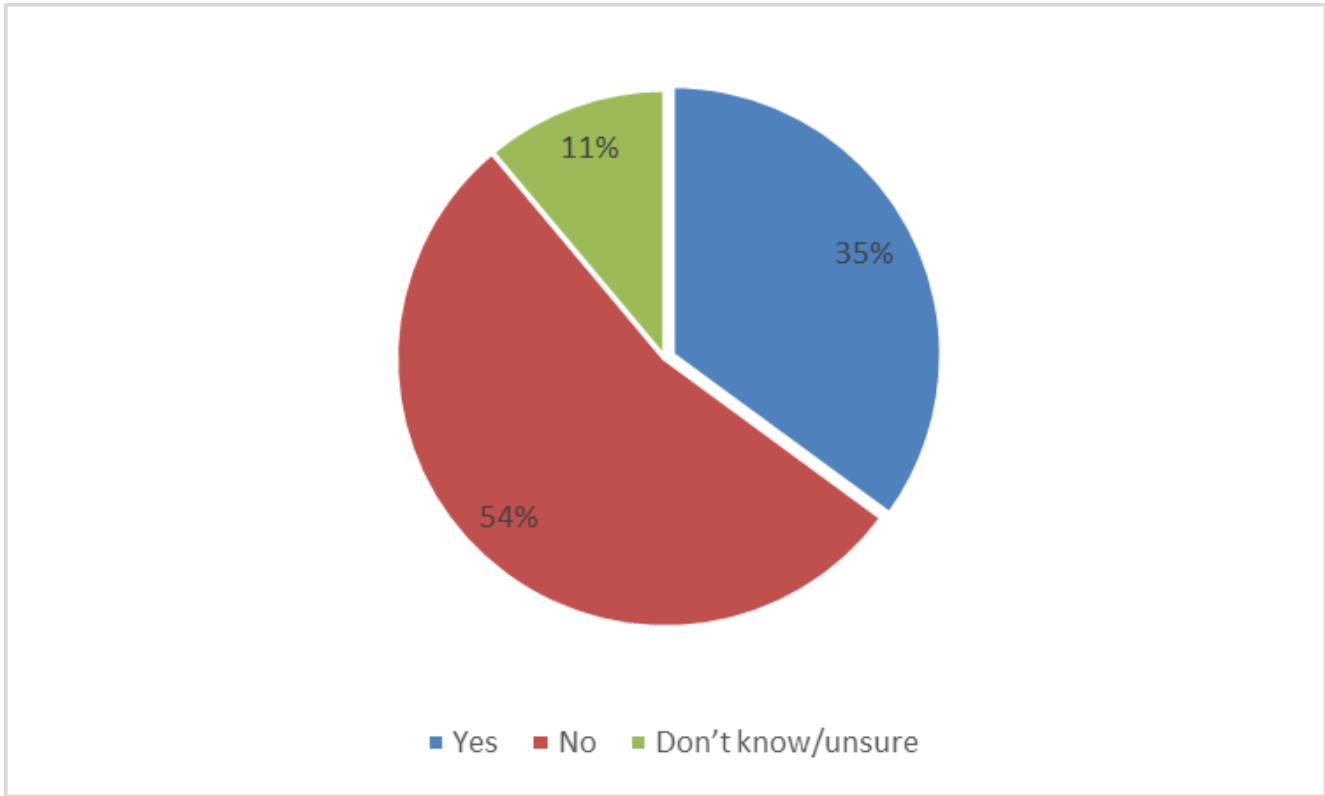
7. Compared with other products (e.g. glass, plastic, metal), what is the recycling rate of paper products? (Lowest = recycled the least. Highest = recycled the most)



Paper products have the highest recycling rate in the U.S. when compared to other materials such as glass, plastic and metals. However, only 8% of respondents selected the correct answer.

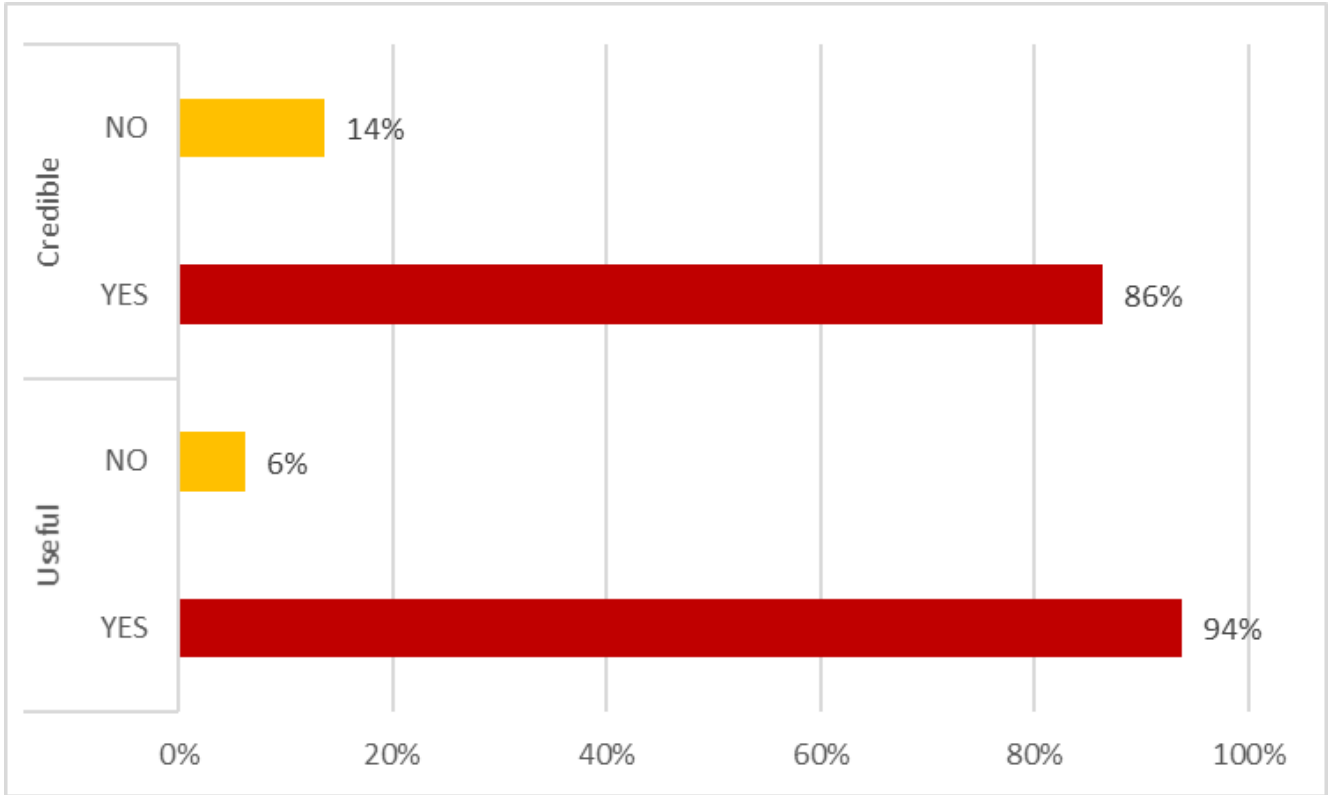
- 33% believe the recycling rate of paper products is average when compared to other materials (35% of 18 to 24 year olds).
- 21% believe it is higher than the average (20% of 18 to 24 year olds).
- 21% were unsure (10% of 18 to 24 year olds).
- 17% believe it is lower (20% of 18 to 24 year olds).
- 11% believe it is the lowest (11% of 18 to 24 year olds).
- 8% believe paper has the highest recycling rate (5% of 18 to 24 year olds).

8. Have you seen recent ads promoting the effectiveness or environmental friendliness of print and paper?



Over 35% of respondents indicated that they have seen ads promoting the effectiveness or environmental friendliness of print and paper.

9. Did you find the information was useful? Credible?



- 94% of the respondents stated that they found the ads useful.
- Over 86% stated they found the ads to be credible.

About Two Sides

Two Sides is an independent, nonprofit organization created to promote the responsible production, use and sustainability of print and paper. Two Sides is active globally in North America, Europe, Australia, South Africa, Brazil and Colombia. Our members span the entire print and paper value chain, including forestry, pulp, paper, inks and chemicals, pre-press, press, finishing, publishing, printing, envelopes and postal operators. For more information about Two Sides North America, please contact us at 1-855-896-7433 or info@twosidesna.org. Visit the Two Sides website at www.twosidesna.org and follow Two Sides on [Facebook](#), [LinkedIn](#), and [Twitter](#).