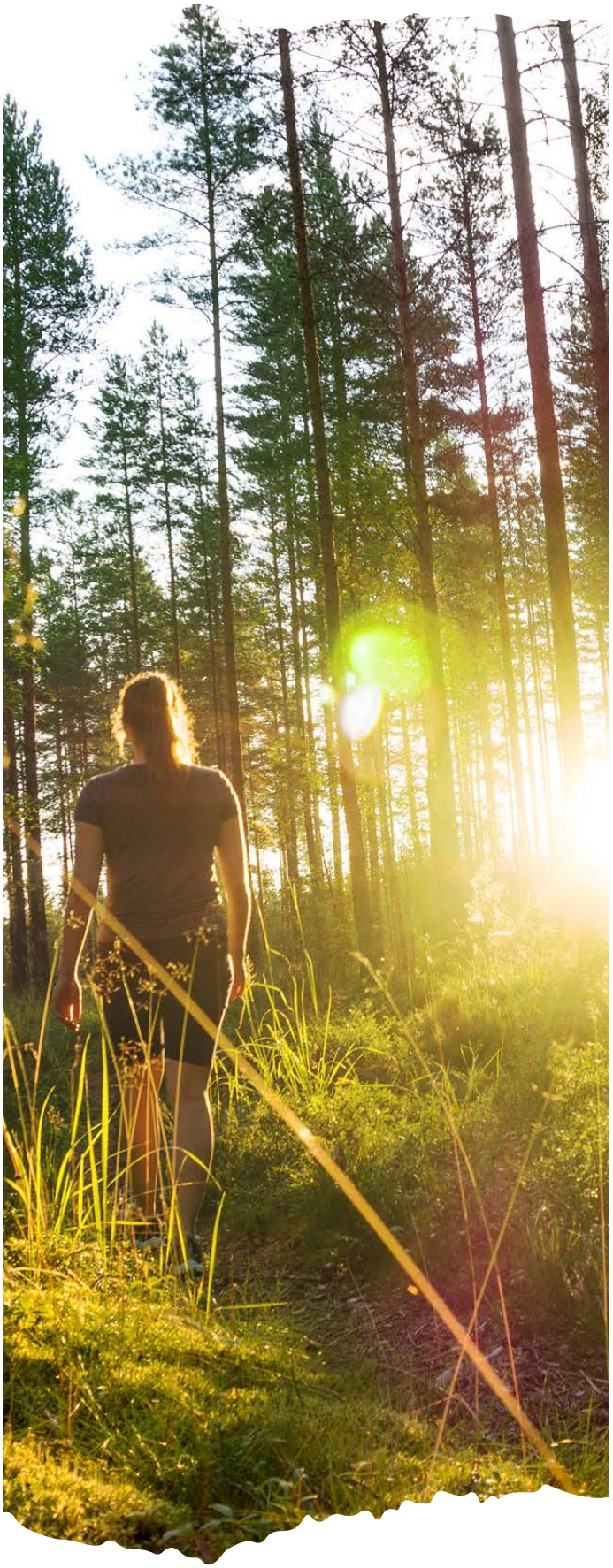
Two Sides Latest Trend Tracker Survey Reveals Both Challenges And Opportunities For The Print And Paper Industry



About The Survey

The Two Sides Trend Tracker survey explores consumer attitudes towards print, paper, paper-based packaging and tissue products.

In January 2023, a global study of 10,250 consumers was commissioned by Two Sides and conducted online by the independent research company Toluna.

This biennial survey seeks to understand changing consumer preferences, perceptions and attitudes towards print, paper, and paper-based packaging, specifically their:

- Environmental Perceptions
- Reading Habits
- Packaging Preferences
- Attitudes Towards Tissue Products

Nationally representative surveys were undertaken in Argentina (400), Brazil (1,000), Chile (350), Paraguay (200), South Africa (500), 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).

This document provides a few key findings for Europe. An executive summary of the European Trend Tracker Research 2023 together with detailed findings, broken down by country, age and gender, is available free to Two Sides members or to purchase at €849 for non-members.

To register your interest in receiving the full report, visit: **www.twosides.info/trend-tracker-2023**

To find out more about the Two Sides campaign, and how you can become a supporter visit: **www.twosides.info**

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

TWO SIDES

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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.

Key Findings:

Environmental Perceptions

- Only 15% of consumers understand that European forests are growing
- Just 18% of consumers understand the paper recycling rate exceeds 60% in Europe

Media Habits

- 65% of consumers prefer to read books in print
- 58% of consumers don't pay attention to online adverts
- 52% of consumers believe children learn more when reading printed materials, compared to digital

Packaging Preferences

- 55% of consumers prefer paper packaging for being better for the environment
- 39% of consumers believe governments and local authorities have the most responsibility to ensure we reduce our use of non-recyclable packaging

Tissue Products

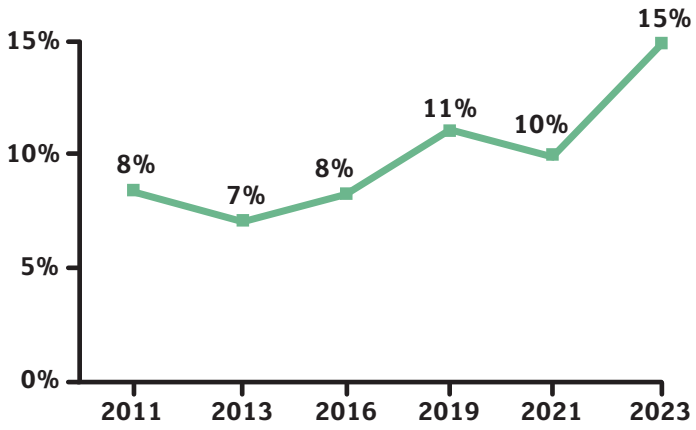
- 62% of consumers want to see the tissue industry investing more in sustainable manufacturing
- 41% of consumers worry about the environmental impacts of tissue products

Environmental Perceptions

The 2023 study found that the number of consumers who understand European forests are growing in size has improved to 15% in 2023 compared to 10% in 2021.

FACT: Between 2005 and 2020, European forests grew by 58,390km^2. That is an area larger than Switzerland! - *FAO Data, 2005 - 2020.*

Percentage of EU consumers who understand that European forests are growing



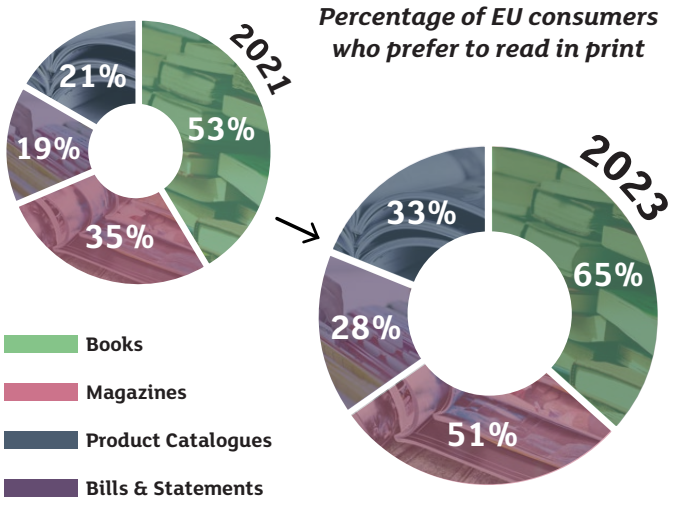
The survey found that only 18% of European consumers understand the recycling rate for paper and paper-based packaging exceeds 60%. This has improved slightly from 2021 when it was 16%.

FACT: The European paper recycling rate is 71%, making it one of the most recycled materials in the world! - *CEPI, 2021.*

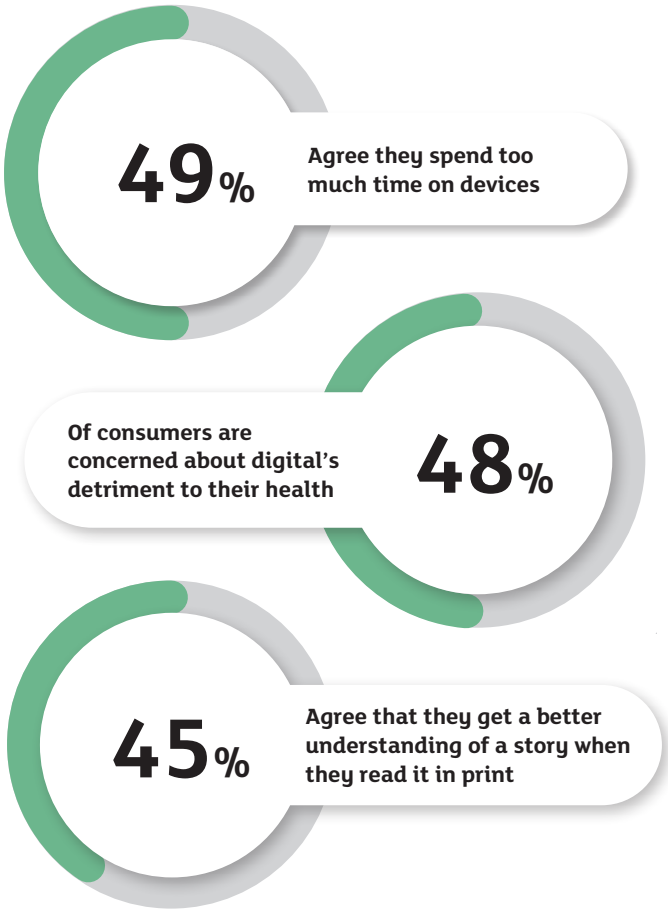


Media Habits

There has been a significant recovery in consumer preferences for printed materials since the COVID-19 epidemic.



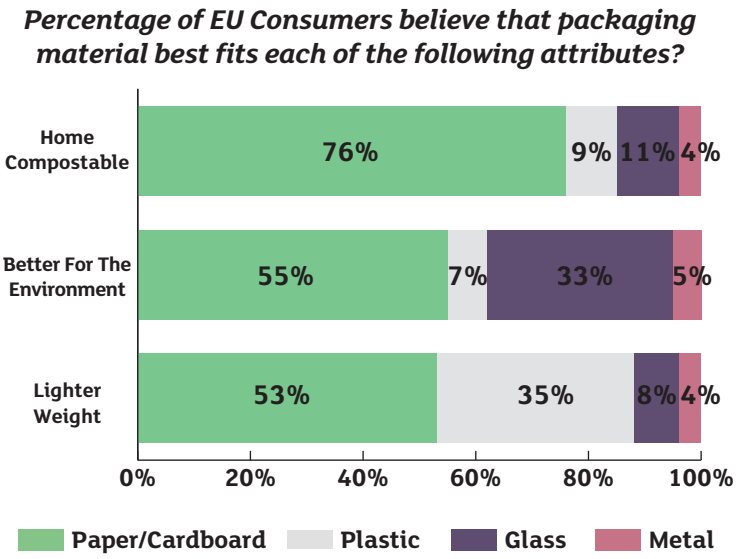
It cannot be denied that the internet is changing the way that many receive news and information, but the growing dependence on digital communication brings its own challenges. The survey reveals consumers have increasing lifestyle and health concerns about digital communication.



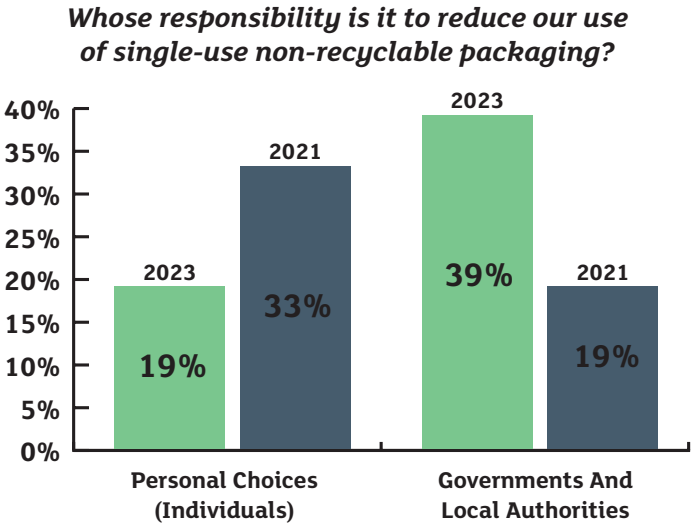
Packaging Preferences

As the number of consumers purchasing goods online continues to grow, awareness of packaging choices and attention to the environmental impacts of the packaging material is increasing.

Paper-based packaging is the preferred packaging material for 10 out of 15 attributes, with 55% of consumers choosing it as better for the environment, and 76% for home compostability.



When consumers were asked to rank who they believe has the most responsibility for reducing the use of single-use non-recyclable packaging, 39% now believe that governments and local authorities are the most responsible. This is a big change from 2021, when consumers ranked the individual (your personal choices) as the most responsible at 33%.

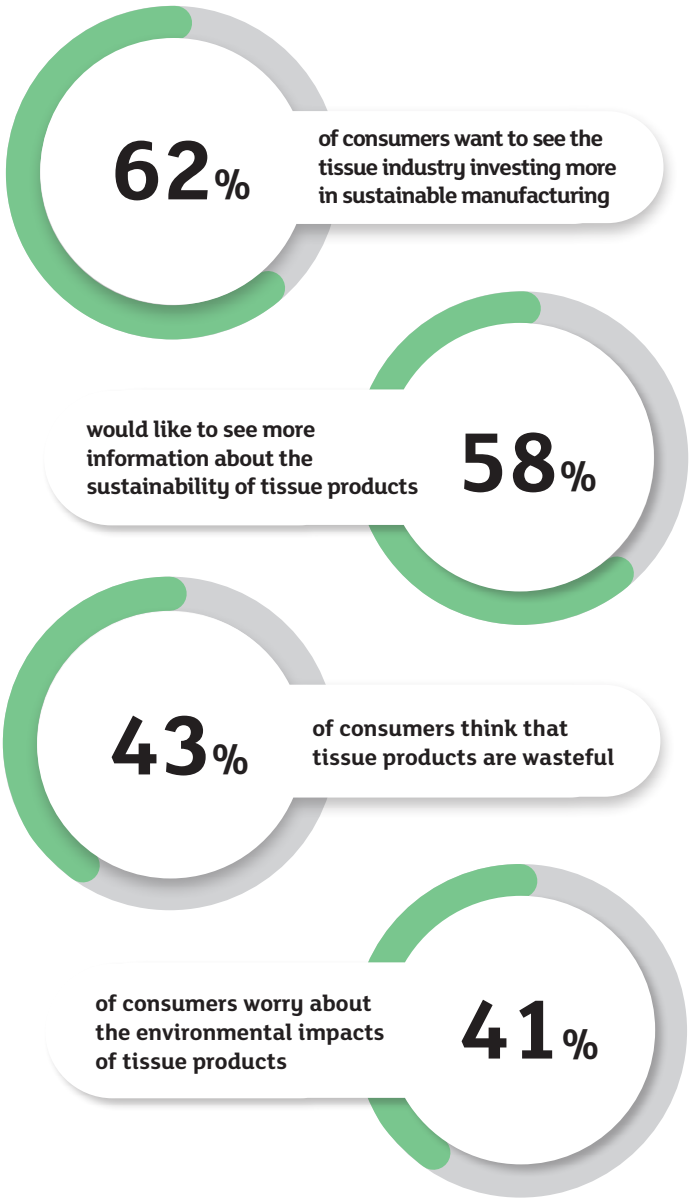


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Tissue Products

Tissue products form an essential part of our everyday lives. They're a resource that we all value and sometimes take for granted their sanitary and health benefits. However, environmental myths about tissue's impacts on forests and the environment are common.

The survey revealed a preference for tissue products to be made from recycled paper, with 63% of consumers thinking it's better to make tissue products from recycled fibre, and 44% actively looking for recycled tissue products.



Conclusions

Whilst it's good to see there have been some improvements in consumer perceptions, the survey shows that there is much work to do to inform consumers about the sustainability of the paper industry and its products.

We must continue to invest in efforts to educate consumers about the paper industry's leading role in a sustainable circular economy and, in particular, our efforts to keep European forests healthy and productive.

"The continuing belief that European forests are shrinking in size and the significant underestimation of the industry's recycling rate is a wake-up call.

Providing consumers with information and simple facts about our sustainability must be seen as a priority for an industry which is investing so much in creating attractive, functional and sustainable products."

Jonathan Tame: Managing Director, Two Sides Europe

About Two Sides

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

Every year there are over 230,000 visitors to the Two Sides websites with electronic newsletters distributed to over 1.5 million.

The 'Love Paper' campaign, reaches over 240 million people a year through its European advertisements, worth an estimated €3.5 million in value. An increasing social media presence reaches 19 million European consumers and business professionals annually.

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.

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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