
A 2016 survey of Austrian consumers undertaken by Two Sides

The attractiveness and sustainability of Paper & Print media

The Austrian consumer's view

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

Organisations 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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9. Did you find the information was:	Fehler! Textmarke nicht definiert.

Executive Summary

The survey was commissioned by Two Sides and carried out by international research company Toluna in 2016. The survey was undertaken across six European countries; Austria, France, Germany, Italy, Spain, and the UK, and internationally in Australia, Brazil, New Zealand, North America and South Africa.

This report details the responses from 602 Austrian 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 organisations 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 recognise 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 European forests growing in size (44,000 square kilometres - an area bigger than Switzerland in the past 10 years or the equivalent of 1,500 football pitches a day), 65% of UK respondents perceive that European forests are shrinking. The majority of respondents do not know that paper is one of the most recycled products in Europe with recovery rates of 72%.

In general, the views of millennials are not significantly different than older age groups. 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 - 24 year old age group had a lower awareness of the state of European forests and recycling rates for paper when compared to overall survey results.

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

- 74% agreed that print on paper is more pleasant to handle and touch when compared to other media (compared to 69% in 2013)
- 83% agreed that paper is based on a renewable resource (75% in 2013)
- 25% believe that our forests have either stayed the same or increased in size (vs. 20% in 2013)
- 57% believe that the paper industry has a higher than average recycling rate (53% in 2013)
- 8% have seen adverts related to the effectiveness and sustainability of print and paper (vs. 16% in 2013), and a large majority rated the ads as credible and useful.

Key Findings:

“Go Paperless-Go Green” claims are questioned by many

There is clearly some consumer cynicism when they see environmental claims being linked to an encouragement to stop receiving paper bills and statements:

- 80% of respondents receiving environmental claims like; “Go Paperless – Go Green”, or “Go Paperless – Save trees”, or “Get your bills on line - it’s better for the environment” believe companies are seeking to save costs.
- 46% feel misled by these claims
- 63% question the validity of these claims

Home Printing Continues

Clearly online billing is now established and many consumers don’t generally print bills at home. However, there is still a significant amount of home printing for various bills and statements

- 45% print some or all of their financial services bills and statements at home
- 40% print some or all of their utility bills and statements at home
- Even at the lower end of home printing, 26% print out some or all of their mobile phone bills

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

There is a clear resistance to being unwillingly moved to online communications

- 85% would be unhappy if they were asked to pay a premium for paper bills and statements
- 51% of respondents want the option to continue receiving printed information as it provides a permanent record for important documents.
- 44% are unhappy that the responsibility to print valuable documents is being passed to consumers
- 29% would consider changing provider if they are being asked to move to paperless communication.
- 28% of all respondents still don’t have a reliable internet connection and want paper records

Consumers see print and paper as sustainable but concerns about forestry persist

Print and paper is still a preferred communication channel and whilst consumers are concerned about the effect on forests by the production of paper they understand the natural and recyclable characteristics of print and paper and believe it is a sustainable way to communicate.

- 98% feel recyclability is an important characteristic for environmentally responsible products
- 87% of respondents believe new forests are necessary to counteract global warming
- 89% agreed that, when responsibly produced, used and recycled, print and paper can be a sustainable way to communicate
- 94% believe 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
- 83% still prefer reading print on paper than from a screen.
- 74% of consumers enjoy the tactile experience of paper and print
- 67% are concerned about the effect on forests by the production of print and paper
- 85% consider that paper is based on a renewable resource.
- 32% believe paper records are more environmentally sustainable than electronic storage of information

Forest growth in Europe is still misunderstood

Consumers are unaware of the fact that European forests have grown by more than 30% in size over the last 50 years

- 13% of consumers believe European have grown in size over the past 50 years
- 79% believe that they had stayed the same or reduced in size

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

Consumers are not aware that 72% of European paper is recycled and have a very mixed opinion of the percentage of paper recovered for recycling across Europe.

- 54% believe that less than 50% of waste paper is recovered for recycling
- Only 14% of consumers believe that the industry recycling rate is more than 60%
- Only 57% believe the industry recycling rate is higher than average, whereas the paper industry has one of the highest recycling rates of all

More people are seeing ads promoting print and paper

8% saw ads related to the effectiveness and sustainability of print and paper (vs. 16% in 2013) and the large majority rated the ads as credible and useful. Whilst this is an improvement, there is clearly more to be done to educate the UK general public.

About Two Sides

Two Sides is a European initiative by companies from the Graphic Communication Value Chain including pulp, paper, inks and chemicals, pre-press, press, finishing, printing, publishing, envelopes and logistics. Our goal is to dispel common environmental misconceptions, by providing users with verifiable information on why print and paper is an attractive, practical and sustainable communications medium.

In Austria the campaign is executed by Print Power Austria.

Contacts:

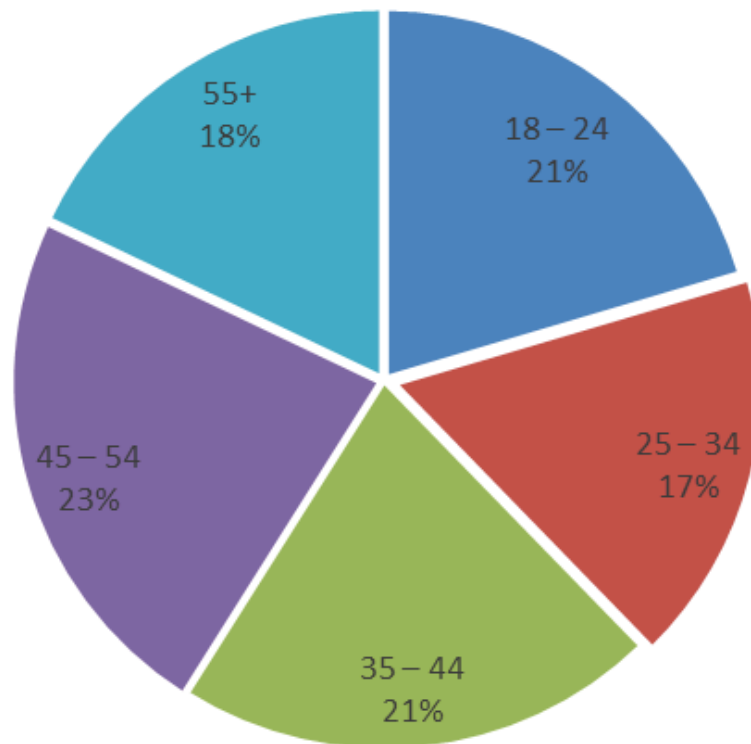
Mag.Patrick Mader
01 – 588 86 ~273
office@printpower.at

The Austrian Survey

Sample size and breakdown

The survey was conducted by independent research organisation Toluna with 602 Austrian respondents in 2016. The split in each age range of consumers was as follows:

Age of Respondents

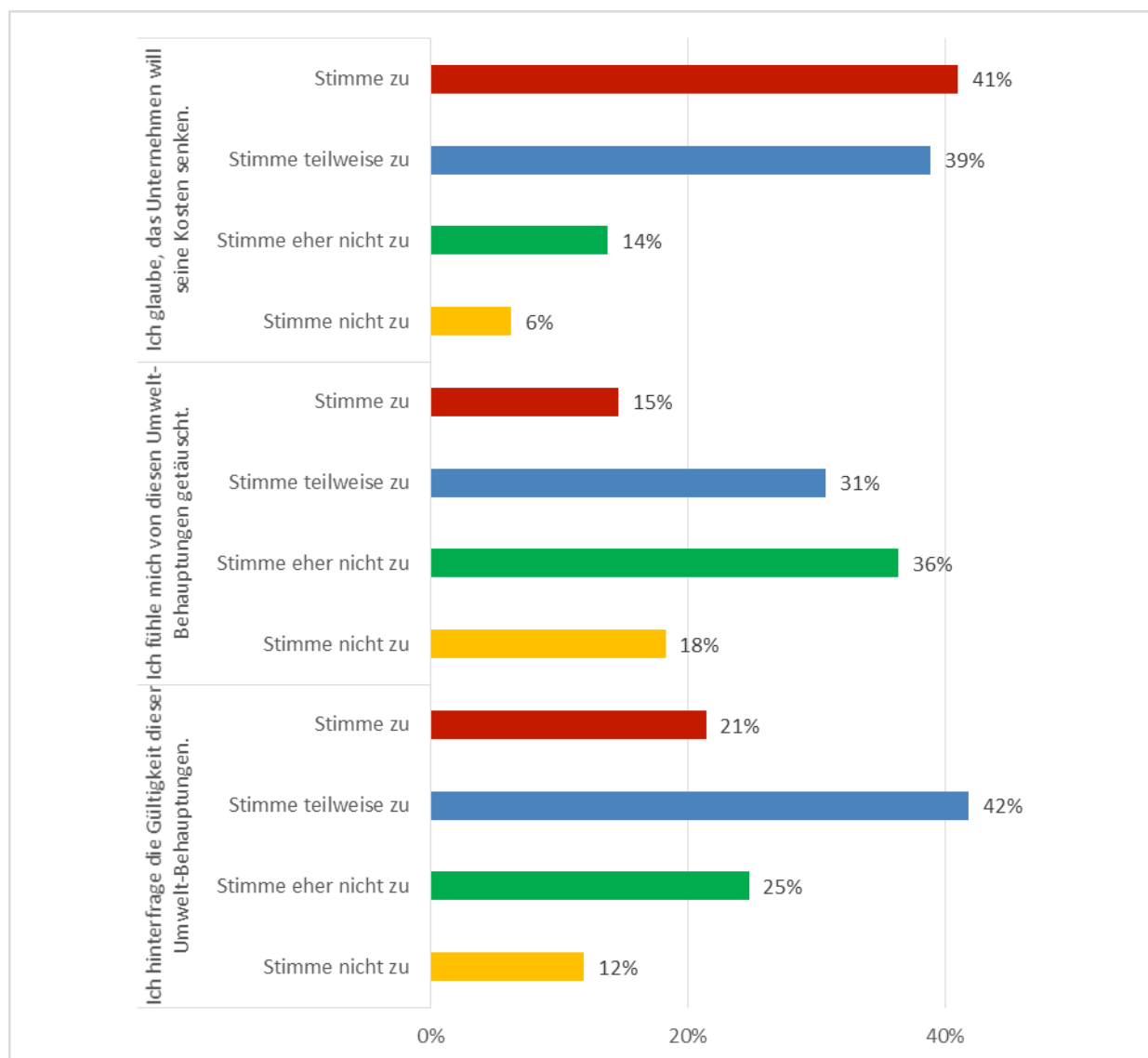


46% of respondents were male and 54% female. Individuals working in the paper, printing or allied industries were excluded from the survey.

Respondents were spread across the Austria

Questions and Responses

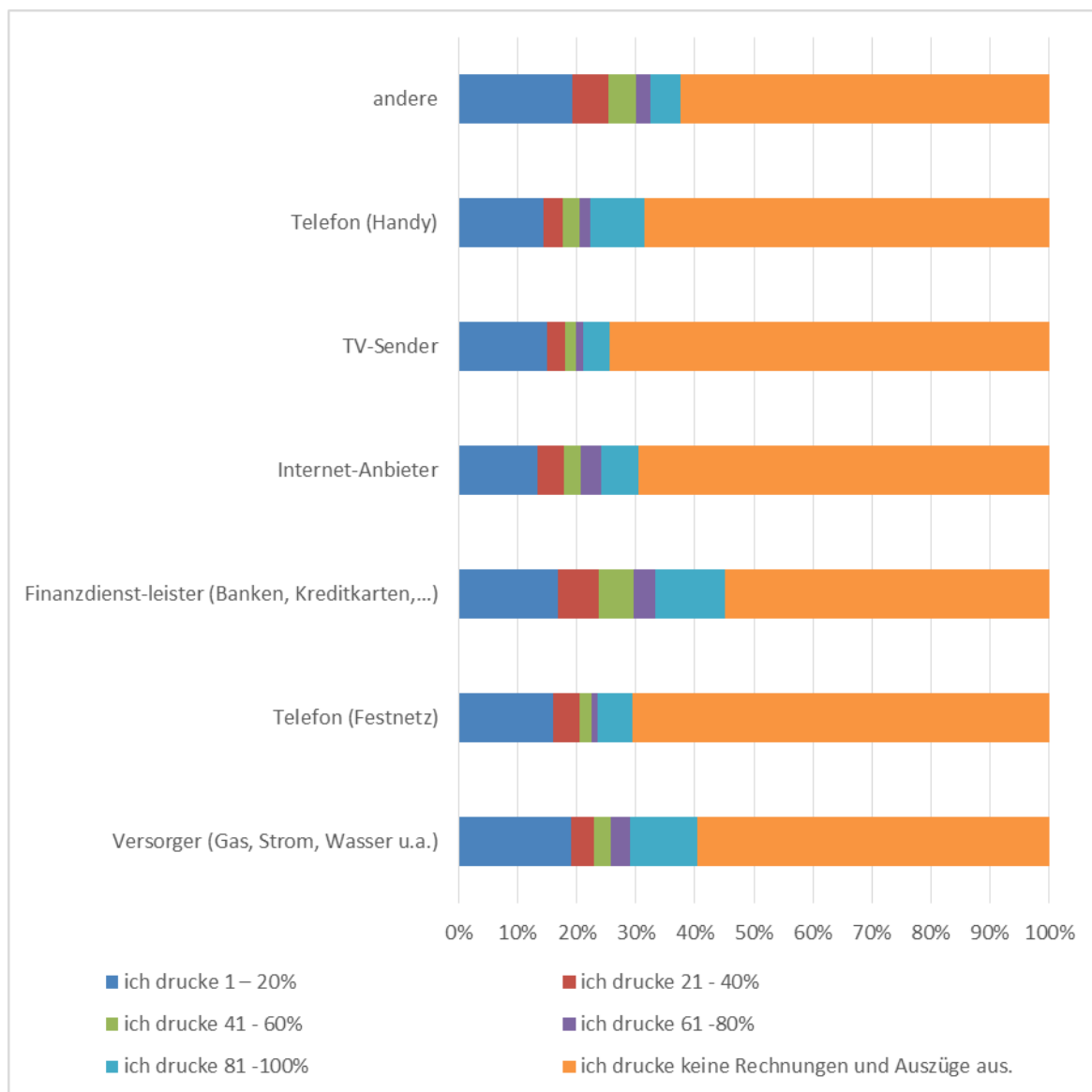
1. If you see a company asking you to stop receiving paper bills or statements by using environmental claims like; *Go Paperless – Go Green*, or *Go Paperless – Save trees*, or *Get your bills online - it's better for the environment*. Do you:



There is clearly some consumer cynicism when they see environmental claims being linked to an encouragement to stop receiving paper bills and statements

- 80% of respondents receiving environmental claims like; “Go Paperless – Go Green”, or “Go Paperless – Save trees”, or “Get your bills on line - it’s better for the environment” believe companies are seeking to save costs.
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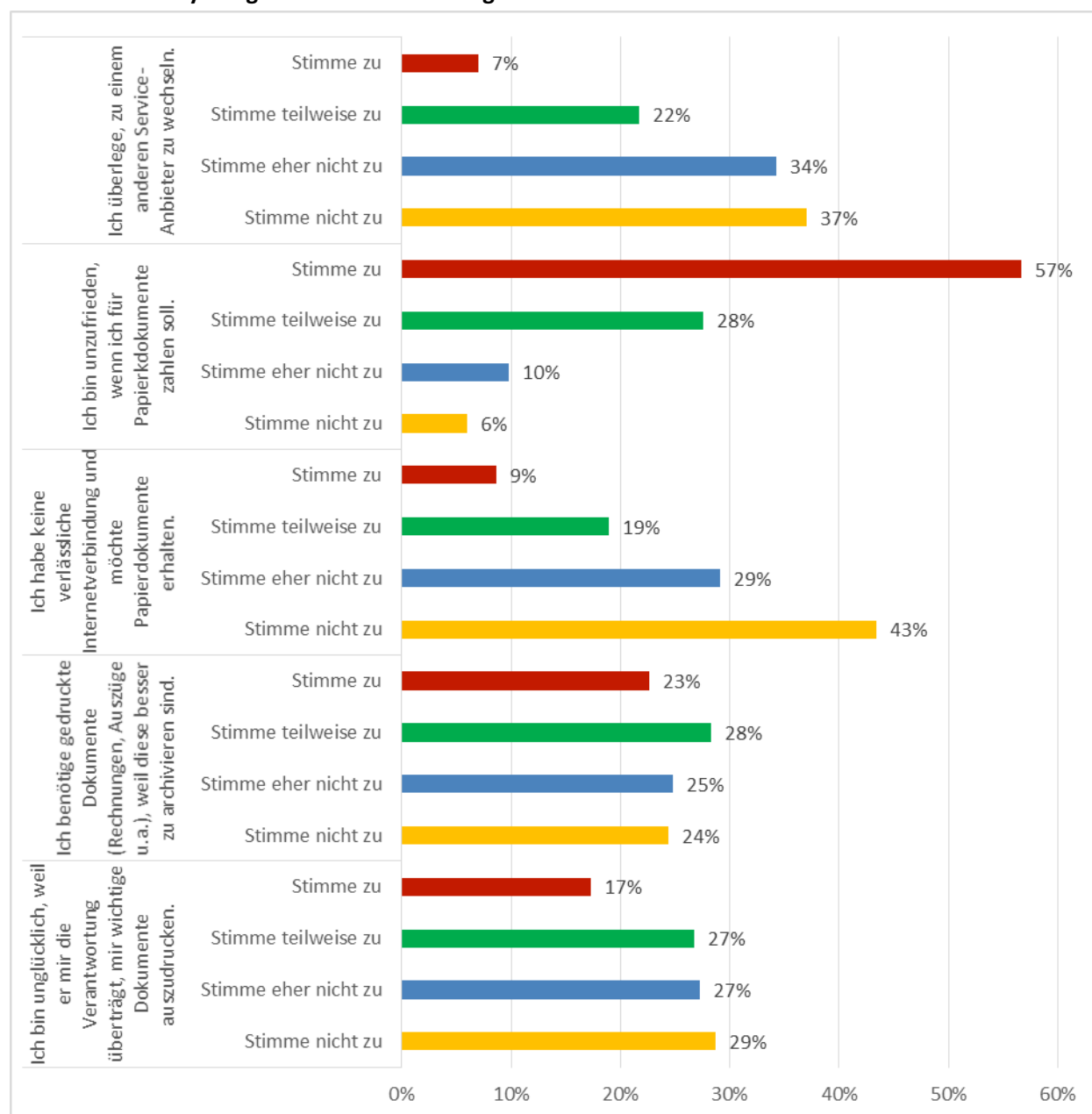
2. If you receive electronic bills and statements, what percentage do you print at home?



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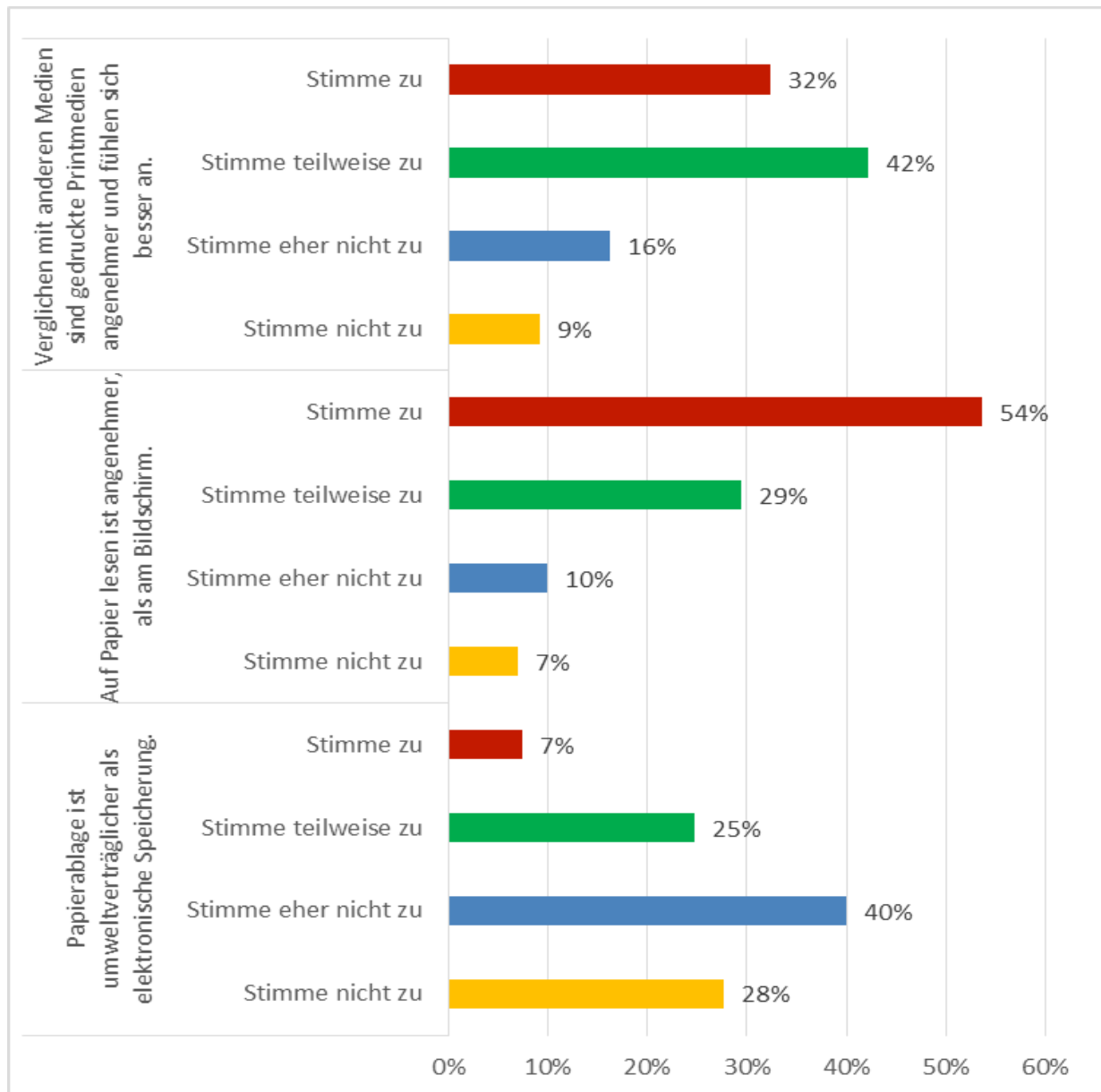
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There is a clear resistance to being unwillingly moved to online communications

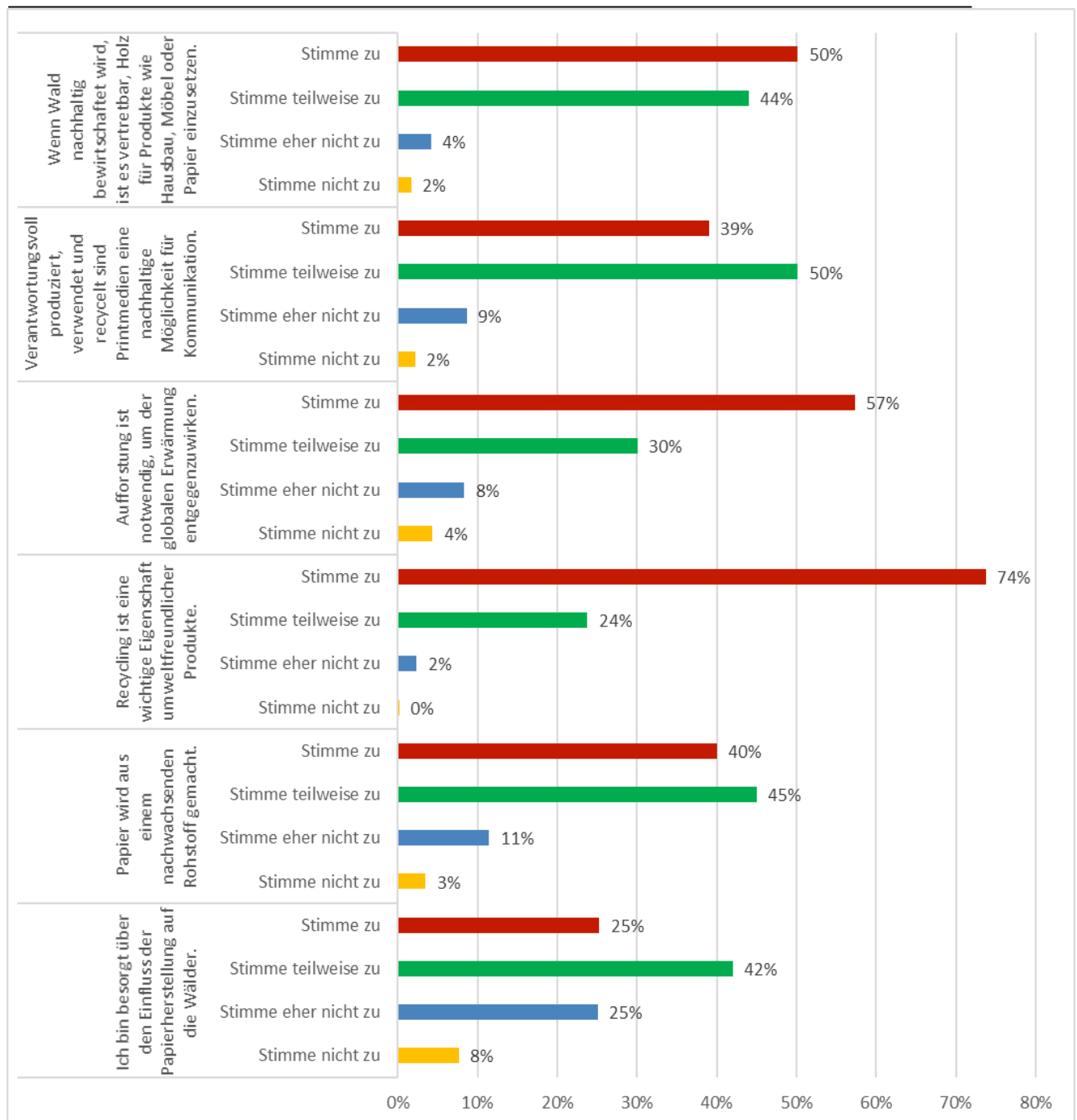
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- 51% of respondents want the option to continue receiving printed information as it provides a permanent record for important documents.
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4. To what extent would you say you agree with the following statements?



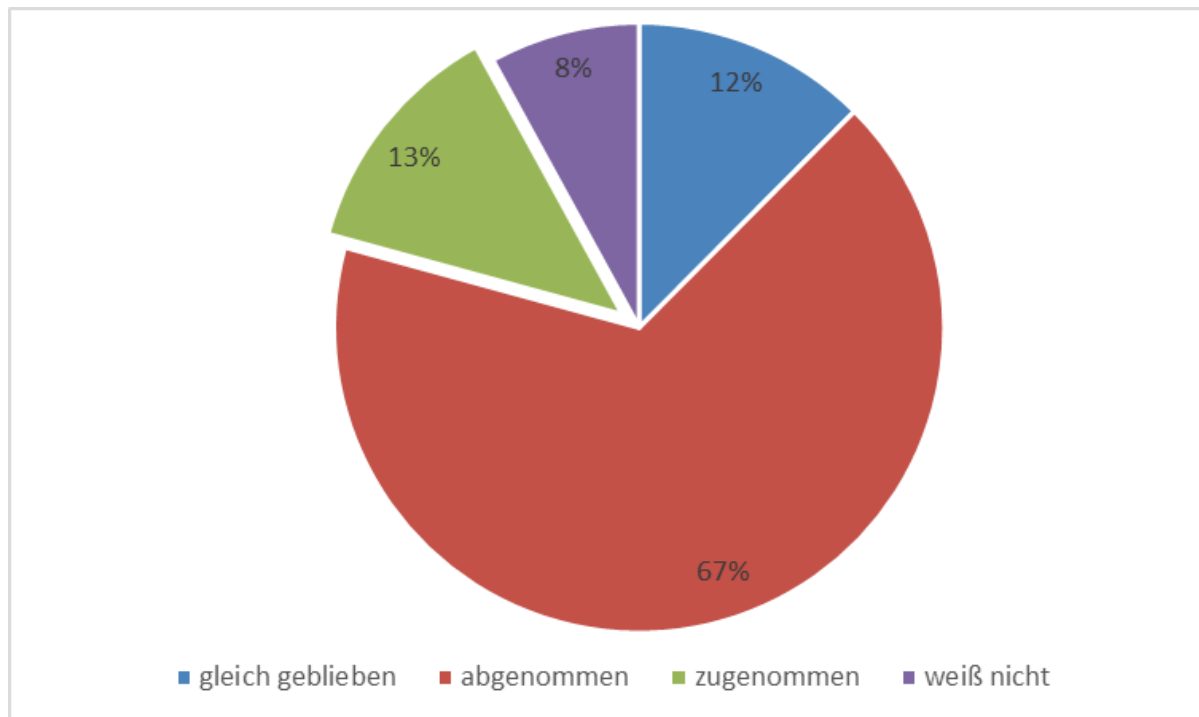
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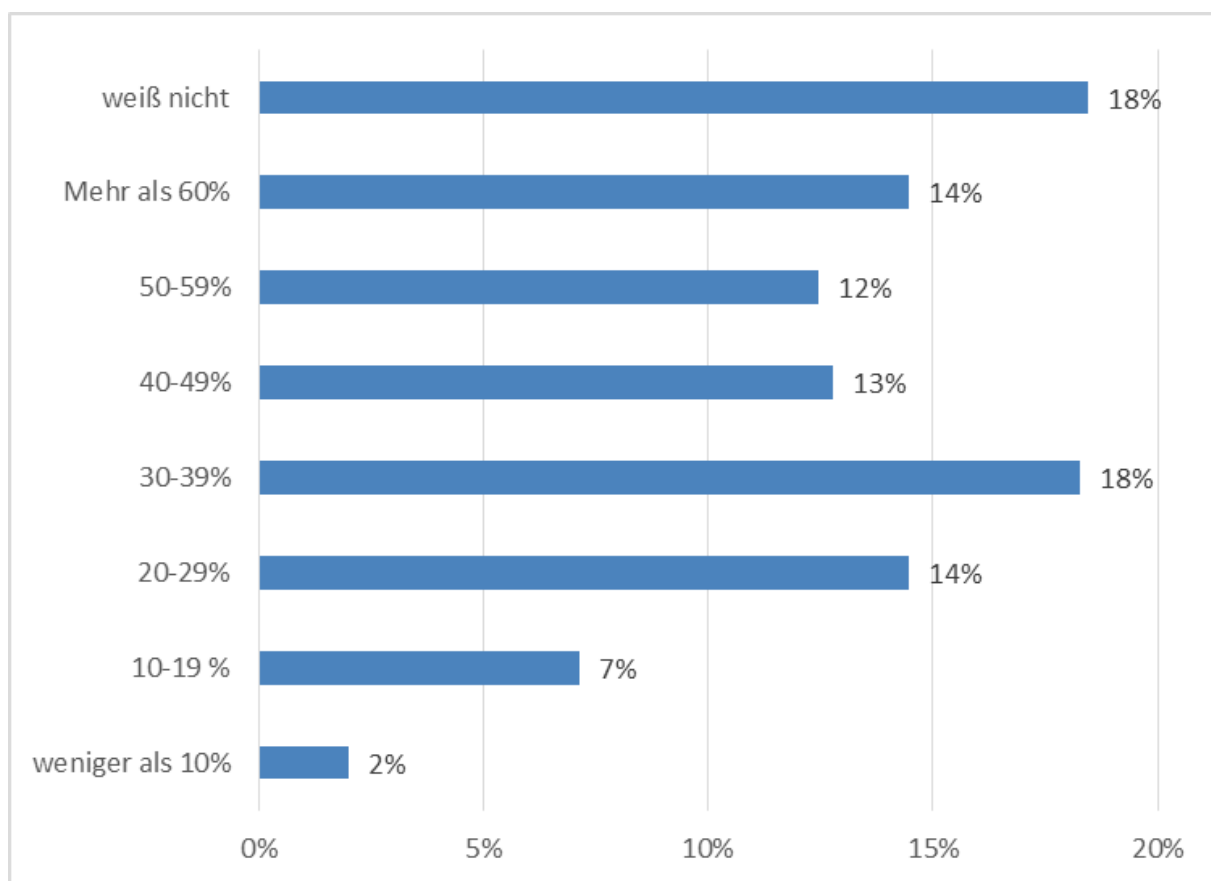
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Consumers are unaware of the fact that European forests have grown by more than 30% in size over the last 50 years

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6. What percentage of paper do you think is recycled in Europe?

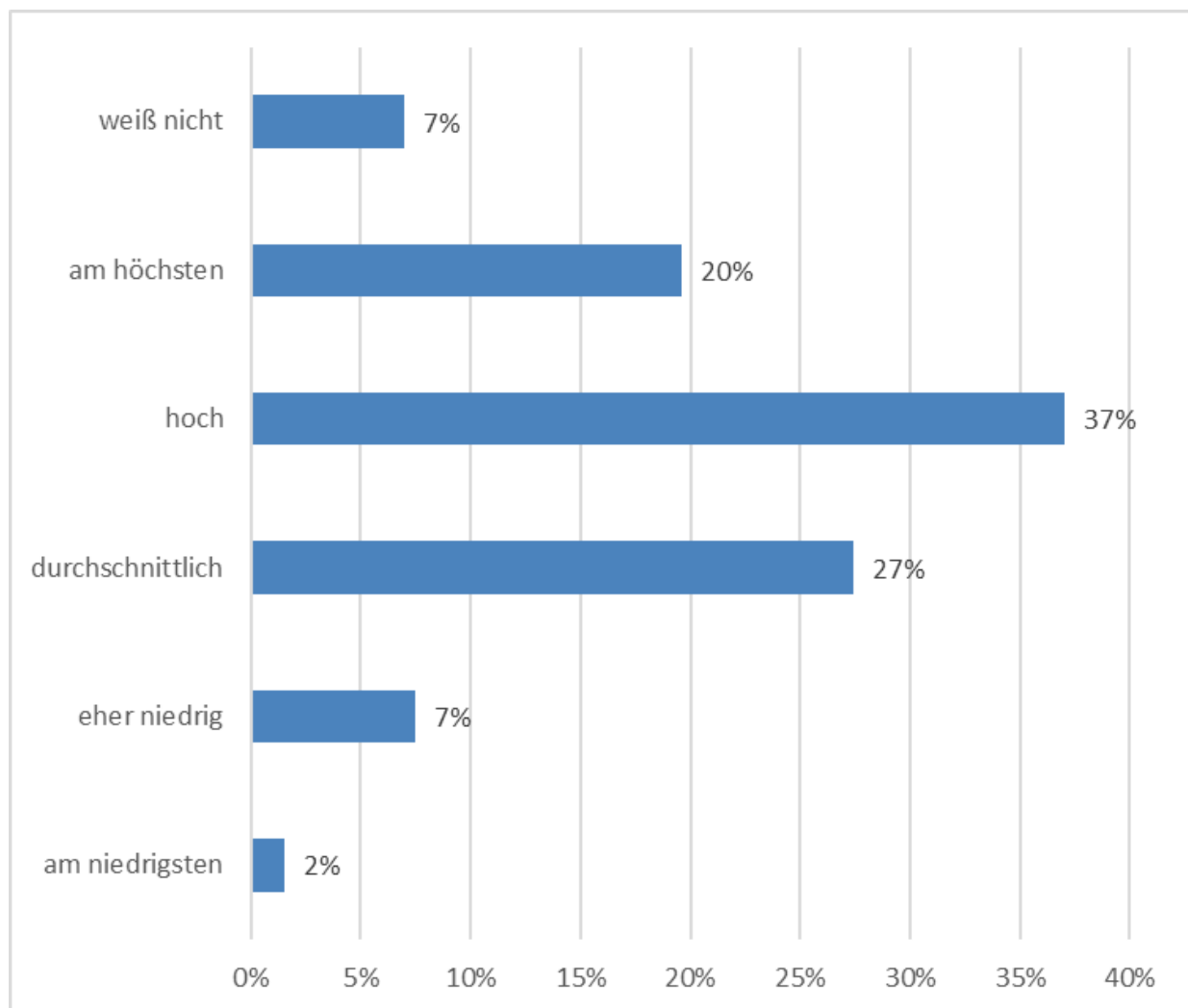


Consumers have a very mixed opinion of the percentage of paper recovered for recycling across Europe.

- 14% of consumers believe that the industry recycling rate is more than 60%
- 54% believe that less than 50% of waste paper is recovered for recycling

7. Compared with other products, what is the record of the paper industry on recycling?

(Lowest = recycles the least. Highest = recycles the most)



- 36% of consumers believe the industry has an average or low record on recycling
- 7% are unsure how the industry performs
- 57% think the industry is higher than the average