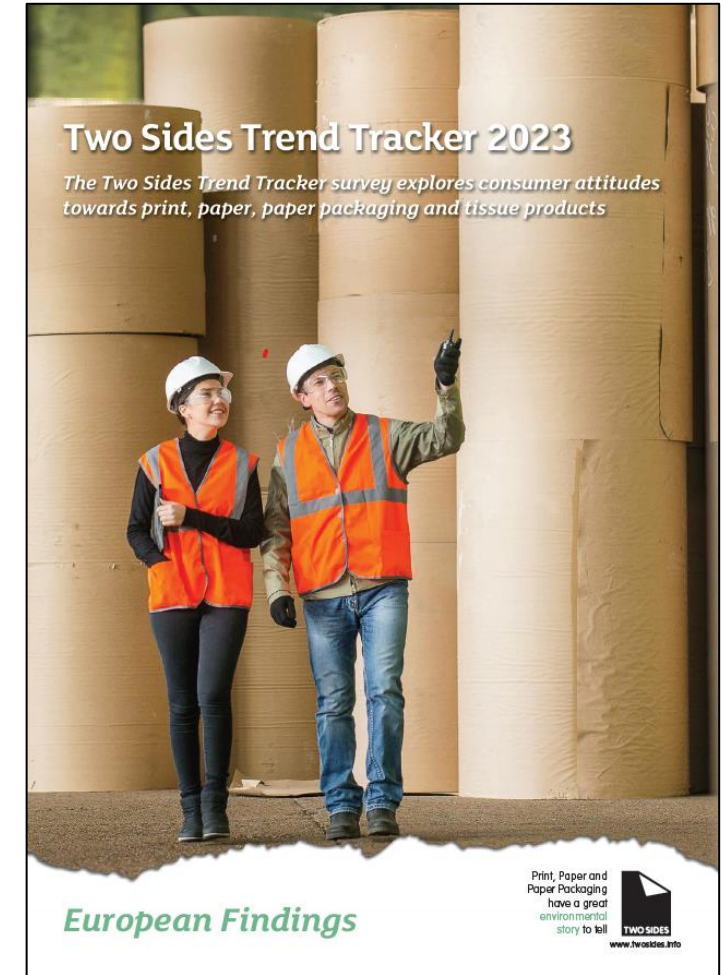


Two Sides 2023 Trend Tracker Survey

- Updated every 2 years
- To explore and understand changing consumer preferences, perceptions, and attitudes towards print, paper and paper packaging
 - Environmental Perceptions
 - Reading Habits
 - Packaging Preferences
 - Attitudes towards Tissue Products



- A global study of 10,647 consumers by independent research company, Toluna
- **Europe - Austria, Belgium, Denmark, Finland, France, Germany, Italy, Norway, Sweden, UK**
- Globally – Brazil, Chile, Argentina, North America, South Africa

Trend Tracker, Main Findings

Headlines

- Covid had an immediate impact on consumer reading preferences – But it has shown recovery post pandemic
- With bills and statements - consumers want the choice and not to be pushed online. They understand service providers are greenwashing, and their primary reasons are to save cost
- Paper’s perception has improved since last survey
- Consumers still believe European forests are shrinking – It has improved, but we have still have work to do
- There is still a significant gap between consumer belief in our industry’s recycling record and reality
- Paper packaging is still the preferred environmental consumer choice

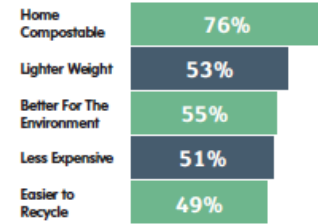
Packaging Preferences Unpacked

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 are increasing too. Survey results show that progressively more consumers believe paper-based packaging is better for the environment than all other packaging materials.

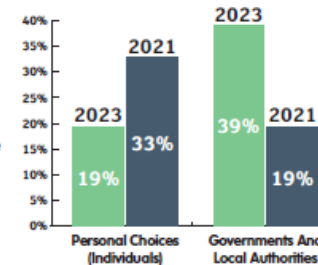
Paper - The Preferred And Sustainable Packaging Choice

Packaging plays an extremely important part in the purchasing decision as it displays vital product information and is used to preserve or enhance product quality. Packaging comes in a variety of forms and the packaging industry is always

Percentage Of Consumers Who Prefer Paper/Cardboard Packaging For The Following Attributes:



Who's Responsible For Ensuring We Reduce Our Use Of Non-Recyclable Packaging?



types of shopping bags available, consumers believe possibility (64%), recyclability (55%) and that they are

copy of the full results, please visit www.twosides.info/trendtracker

Environmental Perceptions of Paper

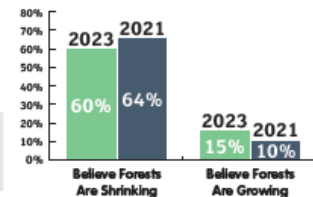
The print and paper industry is surrounded by myths, many of which are rooted in historical misconceptions about paper's impact on forests. For many years, service providers have reinforced these environmental myths in their efforts to move consumers to digital communications. The need to bust these myths and raise awareness of paper's sustainability is now more important than ever.

The Growth of European Forests

The 2023 study found that consumers still perceive forests are decreasing in size, with 60% believing European forests are shrinking, although this number has improved since 2021 from 64%. The number of consumers who understand European forests are actually growing in size has improved to 15% in 2023 compared to 10% in 2021.

FACT: Between 2005 and 2020, European forests grew by 58,390km². That is an area larger than Switzerland! - FAO Data, 2005 - 2020.

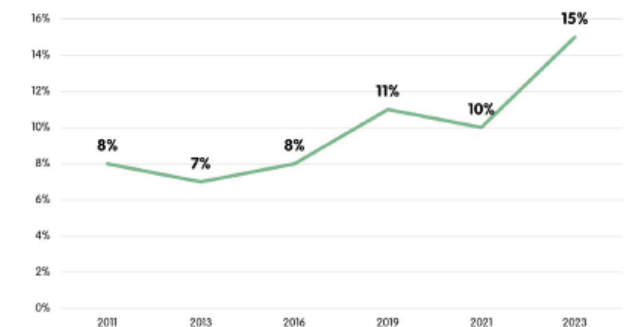
Percentage of Consumers Who Believe European Forests Are Shrinking/Growing:



This has been due to afforestation (for example, planting and seeding of trees on land that was not previously forested) and through the natural expansion of forests on areas such as abandoned land.

To ensure the long-term growth of these forests, the pulp and paper industry supports sustainable forest management. 86% of the wood used by the industry is sourced from within the European Union and 78% comes from certified forests.¹

Percentage of Consumers Who Believe European Forests Are Growing - Trend Comparison



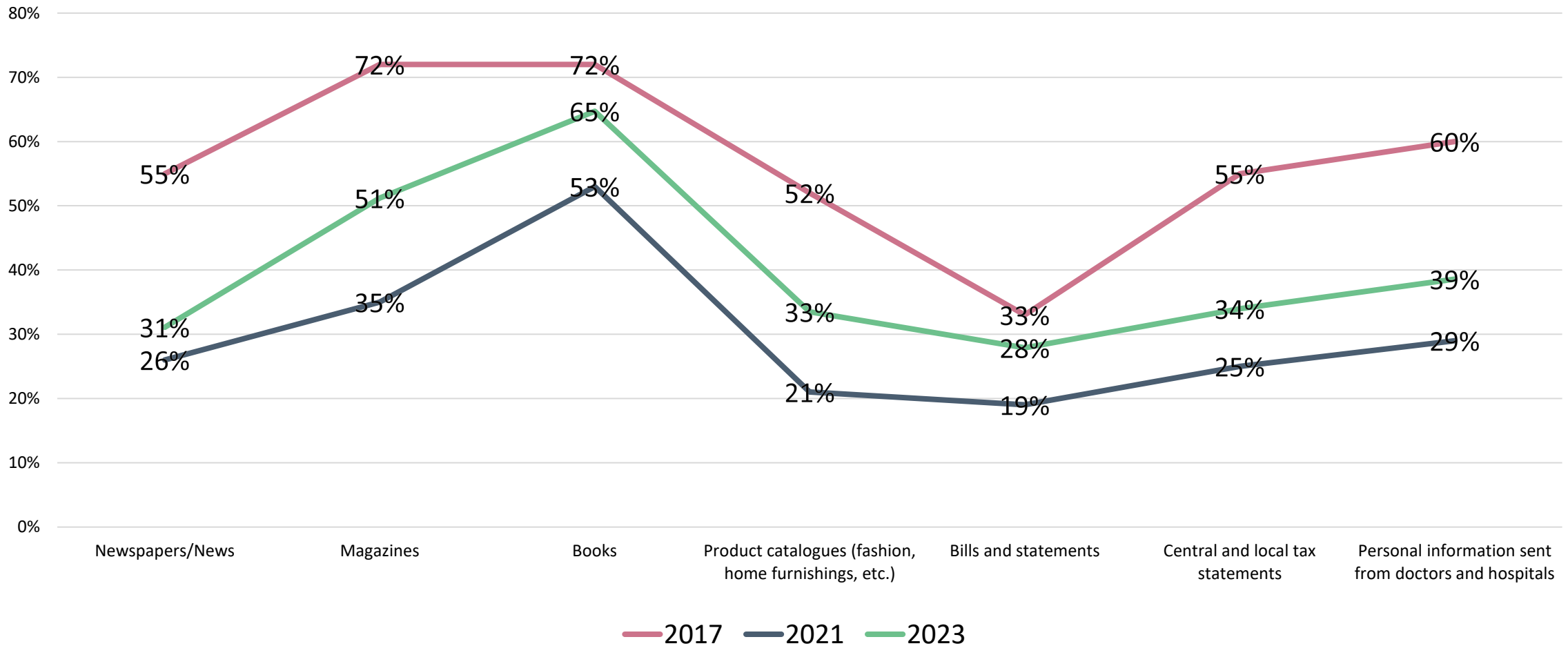
⁴ This report covers the key findings only. To request a copy of the full results, please visit www.twosides.info/trendtracker



Post Covid preferences for print improves



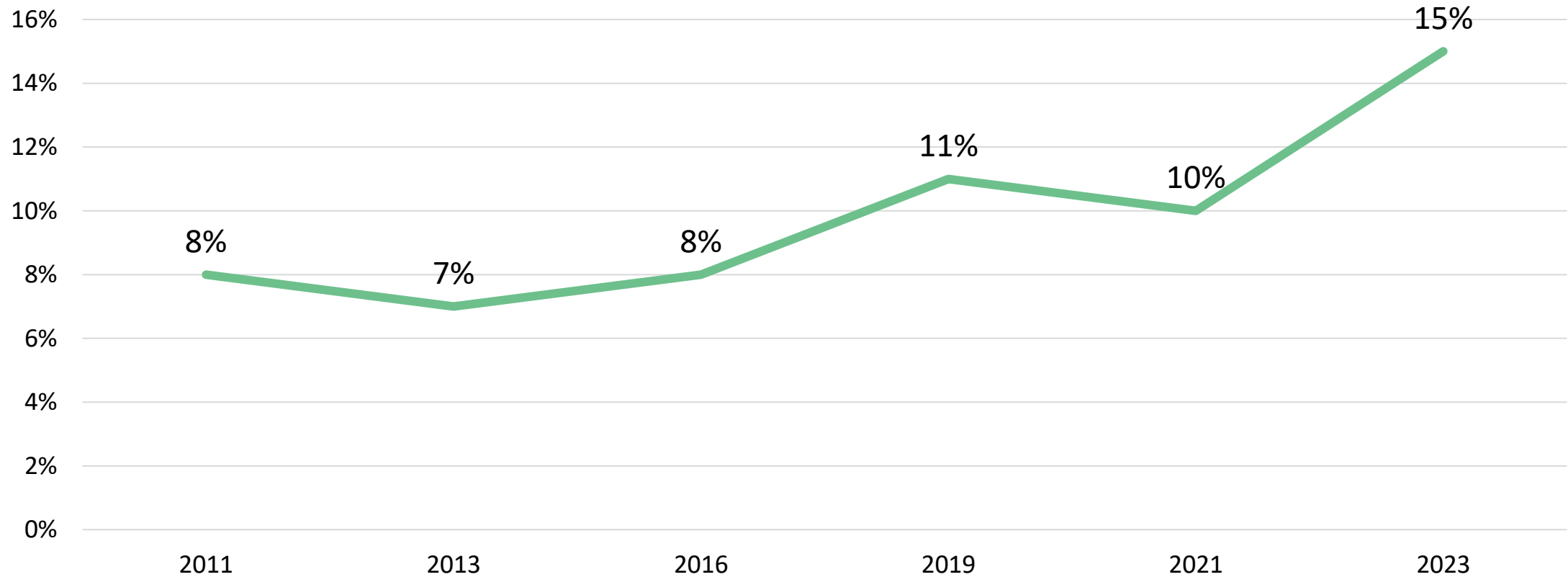
How do you prefer to read or receive...
% of EU consumers who prefer to read in print - 2017 vs 2021 vs 2023





What do you believe has been happening to the size of European forest area since the year 2000?

% of EU Consumers who believe European forests are growing



Perception of recycling rate improving, but still work to do

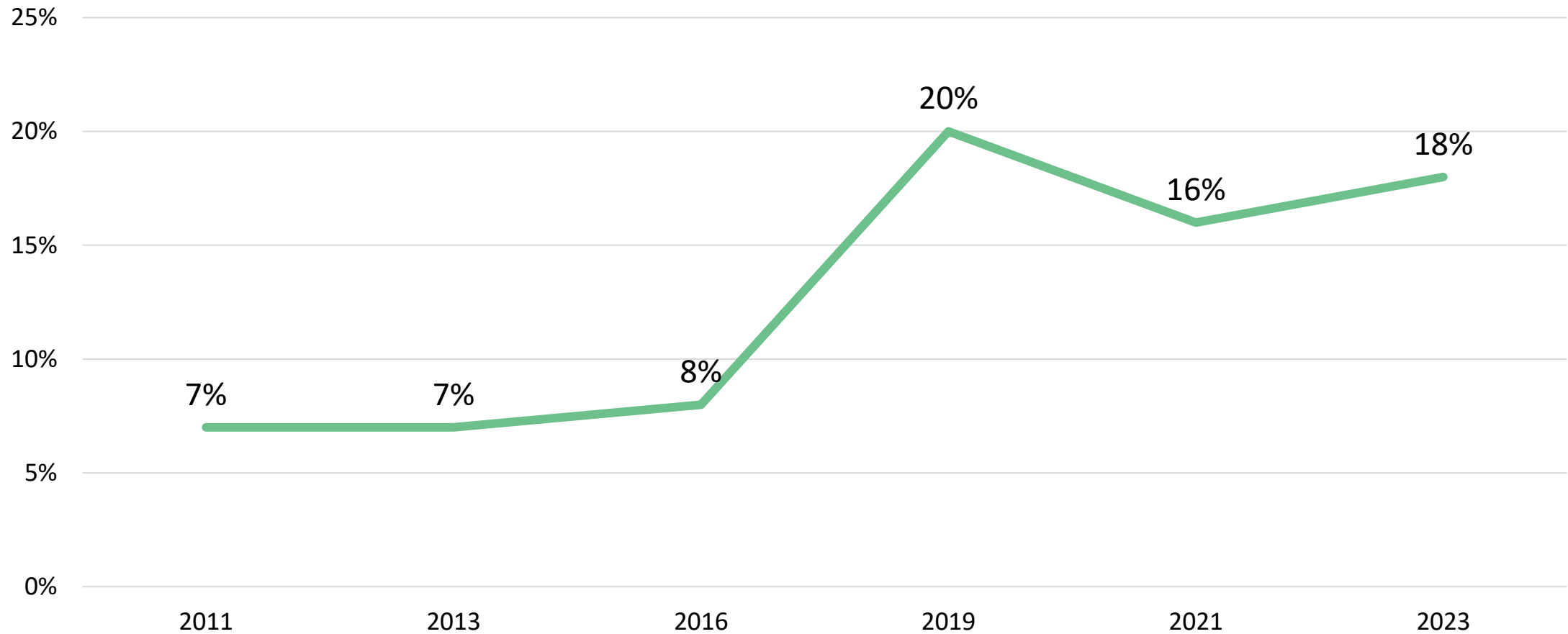


Comparing The Trend



What percentage do you think is recycled in Europe?

Percentage of respondents who believe the paper and paper packaging recycling rate to be over 60%.



[Back to contents ^](#)

Communications

- Not all the news is good for the paper industry
- **European 4page Headline Summary** widely published and available to Non-members – Available English, French, German and Italian
- **European 16page Executive Summary** and detailed **PowerPoint** (English) available to **members only**. Members will receive email link this week or;
- Register to receive reports at www.twosides.info/trend-tracker-2023/
- North America and South America reports will also be available on request

