

Promoting the sustainability of Print Media PEFC 22nd November

Promoting the sustainability of Print Media, PEFC 22nd November 2012



The Two Sides Mission

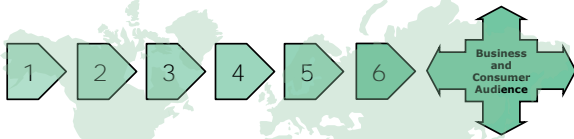
Two Sides promotes the responsible production and use of print and paper and dispels common environmental misconceptions by providing users with verifiable information on why Print Media is an attractive, practical and sustainable communications medium

A unique initiative which is uniting, for the first time, all participants in the Graphic Communication Value Chain

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Two Sides Worldwide Partners and Allies



- 1. Pulp & paper production** AF&PA, APIA, CEPI, Eurograf, EPIS, TAPPI
- 2. Paper and equipment distributors** EUGROPA., GAMAA., GASAA, NPTA, Picon
- 3. Printing** ERA, EPE, INTERGRAF, PIA, PIAA, VDMA
- 4. Publishing** ACA, ACMA, EMMA, FIPP EPC, WAN-IFRA, INMA, Fedma
- 5. Envelopes** EMA, FEPE,
- 6. Postal & distribution** PostEurop, IPC, Distripress

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Anti print and paper messages still surround our industry

PayItGreen
thinkbeforeprinting.org
aim World Paper Free Day
National No-Print Day
no paper
PAPER

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Go Green, Go Digital

<http://vimeo.com/20835066>

The 'Two Sides' initiative tells the story of Print and Paper in a straightforward and honest way:

- Tackling the environmental arguments head on
- Balanced approach
- Factual and Authoritative
- Exploring the Myths
- Setting out the Facts

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The paper industry has a great environmental story to tell

Two Sides will set out the facts, such as, (European example):

- Only about 11% of the timber harvested worldwide is used directly by the pulp and paper industries. Fuel and timber are the main users
- The European paper industry sources more than 80% of its wood and its wood pulp from within Europe and the total area of European forest is now 30% larger than in 1950 and increasing by 1.5 million football pitches each year
- 68% of paper is recovered for recycling in Europe
- 54% of the energy consumed by the European Industry originates from biomass

Every region has its own surprising facts and figures!

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The paper industry has a great environmental story to tell

Two Sides will set out the facts, such as, (European example):

- In Europe, paper amounts for more than half of all the packaging material recovered for recycling – more than glass, metal and plastic combined
- A UN report has stated that forest health in Europe is good and is improving and the European Environmental Agency has stated that forestry practice in Europe is developing in such a way that can be considered good for biodiversity.

Every region has its own surprising facts and figures!

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The paper industry has a great environmental story to tell

...and alternatives are not necessarily more sustainable

- 2% of the UK's current energy requirement is demanded by data centres. Roughly the same as the airline industry
- Half of a typical UK household energy requirement could be needed to drive IT equipment; laptops and PCs, in the next 10 years
- One e mail, with a 400k attachment, sent to 20 people, is equivalent to burning a 100w light bulb for 30 minutes.
- 60/70% computers are left on all the time. This is equivalent to: 1.5 billion one bar electric fires on for one hour costing £150 million

Virtual Warming, Costing The Earth, BBC, April 2009

"Reading the news online for more than 30 minutes can consume 20% more energy than reading a traditional newspaper"

Source: Swedish Royal Institute for Technology

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TIMESONLINE

Revealed: the environmental impact of Google searches

Physicist Alex Wissner-Gross says that performing two Google searches uses up as much energy as boiling the kettle for a cup of tea

From The Sunday Times
January 11, 2009

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Google uses 2.3billion kilowatt-hours of electricity a year:

- 207,000 US homes would use this in a year
- The power consumption of about 41 Empire State Buildings
- data centre power use accounts for roughly 2 per cent of the US's annual electricity consumption.
- And for every kilowatt-hour used for computing in a typical data centre, nearly a whole additional kilowatt-hour is used for running cooling and heating systems
- 100 searches on Google is equivalent to burning a 60 watt light bulb for 20 minutes, using 0.03Kwh electricity and 20 gms of CO2
- 100 minutes of U tube video is equivalent to burning a 60 watt light bulb for 13 minutes, using 0.02 Kwh of electricity and 13 gms of CO2
- Every gmail user uses 2.2Kwh energy every year and generates 1.2kg CO2

Google/Associated Press, Sep 8, 2011

http://en.wikipedia.org/wiki/Google_platform

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E-waste is now the fastest growing component of the municipal solid waste stream

- In Europe e-waste is increasing at 3 – 5% a year, almost three times faster than the total waste stream
- The amount of electronic products discarded globally has skyrocketed recently, with 20-50 million tonnes generated every year.
- Electronic waste (e-waste) now makes up 5% of all municipal solid waste worldwide"

Source: Greenpeace, the e-waste problem,

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The Digital Dump Illegal Electronic Waste

<http://www.twosides.info/the-digital-dump>

The 'Two Sides' campaign

Communication flow

- Measurement
- Engagement
- Advertising
- Direct mail
- Myths and Facts
- Newsletters
- Website
- Research

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Print and Paper have a great future together. www.twosides.info

The 'Two Sides' campaign

'Two Sides', started with B to C advertisements

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Print and Paper have a great future together. www.twosides.info

The 'Two Sides' campaign

Established a consistency across Europe

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Print and Paper have a great future together. www.twosides.info

The 'Two Sides' campaign

Resources-laden websites at the centre of the campaign.

7 sites, 5 languages, 5000+ visitors a month.

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The 'Two Sides' campaign

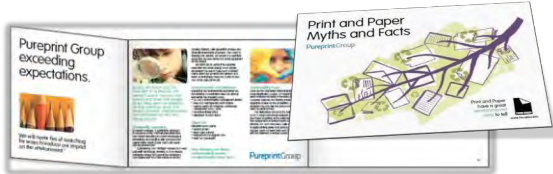
'Two Sides' Newsletters

Communicate to members and all site registrars.

All new website content sent to database c.2,000 contacts

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'Two Sides', Myths and Facts Booklet
Personalisation possible for all members



Multi-language, flexible format, regionally adaptable. Mills, Merchants, Printers and Publishers have all done versions.

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Print and Paper have a great story to tell
www.twosides.ie

The 'Two Sides' campaign

'Two Sides', addressing Greenwash

Engage and challenge!

- Anti-print and paper marketing is usually based on unknown or incorrect assumptions
- Any marketing messages which state that e-communication is more environmentally friendly than print and paper are likely to contravene European advertising regulations
- The term 'Paperless' is misleading – one US study proposed that 30% of e-mails to private consumers and 10% of e-mails to business consumers are printed on receipt
- Faced with reporting to authorities, anti paper marketing is usually withdrawn

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Print and Paper have a great story to tell
www.twosides.ie

Misleading statements and misinformed anti paper organisations are growing



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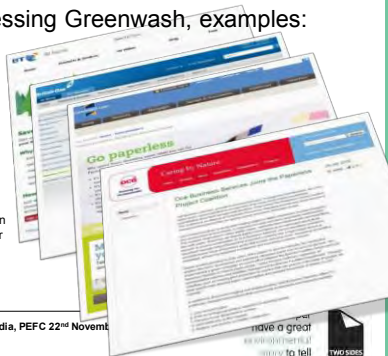


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Print and Paper have a great story to tell
www.twosides.ie

The 'Two Sides' UK campaign

'Two Sides', addressing Greenwash, examples:

- BT.** 'Do your bit for the environment and go paper-free. Save ££'s and trees with paper-free billing'
- British Gas.** 'Go paperless and do your bit for the environment. Save Time and save a Tree'
- Standard Life.** 'Go Paperless. It's environmentally friendly'
- Oce.** 'The Paperless project Coalition. Reduce carbon emissions and paper usage'



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Print and Paper have a great story to tell
www.twosides.ie

The 'Two Sides' UK campaign

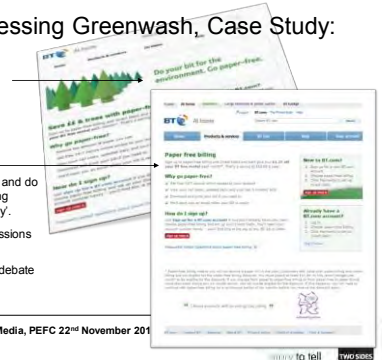
'Two Sides', addressing Greenwash, Case Study:

BT

'Do your bit for the environment and go paper-free. Save ££'s and trees with paper-free billing'

Outcome

BT have now changed messaging and do not refer to 'saving trees' or 'e-billing being environmentally more friendly'.
Two Sides will now continue discussions with other major Corporates.
Two Sides has credibility and can debate with authority.



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Print and Paper have a great story to tell
www.twosides.ie

The 'Two Sides' UK campaign

'Two Sides', addressing Greenwash, New 'Stop Greenwash' Campaign

Successful outcome!

- 83% of Banks
- 64% of Utilities
- 100% of Telecoms

have changed their messages!

Press and Radio coverage Campaign Continues

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The new consumer advertising campaign is running successfully in Europe where there is good connection to publishers

- Campaign development is complete
- Easily adaptable for different countries
- Based on independent research which provides basis for measuring campaign success

No wonder you ♥ paper

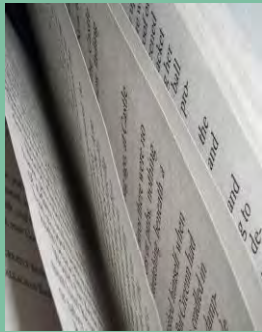
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Consumers' Environmental Perceptions of Print & Paper

Two Sides European and US Consumer Survey

Results



A multi country survey commissioned by Two Sides, September, 2011
Not for distribution outside of the Print Power/Two Sides organisation

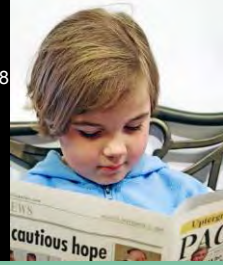


Consumers' Environmental Perceptions of Print & Paper

Consumers prefer paper and see it as a sustainable way to keep records

Consumers like paper, particularly the younger

- ➔ 80% prefer reading from paper, (83% of 18-24 yo)
- ➔ 74% believe that paper is more pleasant than other media, (78% of 18-24 yo)
- ➔ 54% agreed that paper records are more sustainable than electronic storage, (57% of 18-24 yo)



A multi country survey commissioned by Two Sides, September, 2011
Not for distribution outside of the Print Power/Two Sides organisation



Consumers' Environmental Perceptions of Print & Paper

And for important documents, consumers want them on paper

How would you like to keep important documents?

- ➔ 58% prefer to keep important documents on paper, (63% of 18-24 yo)
- ➔ 27% prefer to keep electronically
- ➔ 16% have no preference



A multi country survey commissioned by Two Sides, September, 2011
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Consumers' Environmental Perceptions of Print & Paper

Consumers want recyclable products but maybe don't connect this with paper

Recycling and renewability issues

- ➔ 97% see recyclability as the sign of an environmentally friendly product
- ➔ 68% understand that Print Media is based on a renewable resource
- ➔ 49% believe that the industry has a low or average recycling record
- ➔ Consumers think that recycling rates in Europe are c 20 - 40% (Act.69%)



A multi country survey commissioned by Two Sides, September, 2011
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Consumers' Environmental Perceptions of Print & Paper

Consumers are not aware of paper's true forest impact

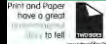
Misunderstanding continues

- 80% believe European forests are smaller or the same as 50 years ago. (Act. 30% bigger)
- Paper is seen as having the biggest impact on the forest, bigger than fuel and the same as construction.

(Act. Paper manufacture uses only 11% of the worldwide forest harvest. Fuel and construction are the biggest users)



A multi country survey commissioned by Two Sides, September, 2011
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Consumers' Environmental Perceptions of Print & Paper

There is a belief that forests are under threat from the use of paper

Paper and Forests

- 76% believe that there is a connection between paper manufacture and loss of tropical rainforest
- 73% are concerned about print and paper's effect on forests



A multi country survey commissioned by Two Sides, September, 2011
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Consumers' Environmental Perceptions of Print & Paper

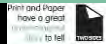
E-communication is regarded as more environmentally friendly

What's the most environmentally friendly way to

	Electronically	On Paper
Newspapers	67%	13%
Book	52%	28%
Magazines	62%	17%
Mail	71%	10%



A multi country survey commissioned by Two Sides, September, 2011
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'No wonder you love paper'

Campaign focuses on two simple facts

Did you know that forests in Europe, which provide wood for making into paper and many other widely used materials, are 30% larger than in 1950? In fact they're increasing by 1.5 million football pitches every year.*

If you love reading your favourite newspaper, isn't it good to know that it's made from natural and renewable wood.

Did you know that almost 70% of paper across Europe is collected and recycled? In fact it's one of the most recycled materials of all.†

Magazines are printed on paper from natural and renewable wood which is all good to know if you love reading your favourite magazine.

*World Forest Resources, 1953 and UN FAO Global Forest Resources Assessment, 2010

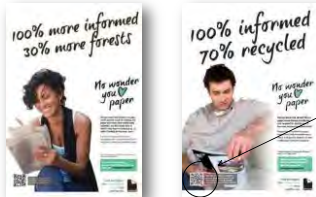
†Monitoring Report of the European Recovered Paper Council, (ERPC), 2010

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'No wonder you love paper'

UK Advert examples



QR codes lead to video and consumer website:

- Quizzes
- Competitions
- Facts

- Talk directly to consumers
- Build on research showing consumer preference for paper based media but concerns about forest loss and poor recycling rates

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'No wonder you love paper'

NLD Advert example



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Campaign website creates simpler consumer experience

Interactive areas

1. Upload 'my favourite use of paper'.
2. Download posters of ads for printing
3. Simple fun quiz based on myths and facts
4. Tell a friend
5. You tube feed
6. Get Myths and Facts booklet.

Updates by dictionary function

- Easily editable text
- Only one or two country specific changes needed
- Monitoring of advert activity.

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Print and Paper have a great story to tell

www.twosides.info

Website, Quiz

Did You Know?

How much paper has a great sustainable reputation going for a green and healthy planet? The answer is... 70% recycled paper. Did you know that? It's true! In fact, 70% of the paper used in the UK is made from recycled paper. And that's a great thing to know. It's a fact that you can be proud of. It's a fact that you can be proud of. It's a fact that you can be proud of.

1. Recycled paper has been used for 20% since 1800 and has increased to 70% of the total paper supply.	1. 100%	2. 50%	3. 20%	4. 10%
2. In Europe, forests have lost 24% of the total area.	1. 100%	2. 50%	3. 20%	4. 10%
3. Pulp Paper and paper is responsible for 21% of the world's greenhouse gas emissions in the paper.	1. 100%	2. 50%	3. 20%	4. 10%
4. Recycling a newspaper can reduce the CO2 emissions by 70%.	1. 100%	2. 50%	3. 20%	4. 10%
5. 27% of Europe's paper is recycled for recycling.	1. 100%	2. 50%	3. 20%	4. 10%

Reveal my answer!

You scored 10/10 points
You are an Environmental Guru - Respect! Take a stroll!

'No Wonder You Love Paper'

Imagery can change but style is consistent across European markets

100% mais pessoal
30% mais florestas

100% geïnfomeerd
30% gerecycleerd

100% geïnfomeerd
70% gerecycleerd

Natuurlijk Papier en Karton

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'No Wonder You Love Paper'

adverts can be targeted at different audiences

100% creative
30% more forests

100% imagination
70% recycled

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Print and Paper have a great story to tell

www.twosides.info

'No Wonder You Love Paper'

adverts can be targeted at different audiences

100% more anticipation
30% more forests

100% creative
70% recycled

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Print and Paper have a great story to tell

www.twosides.info



From mainstream national newspapers to:



From mainstream national newspapers to:



From mainstream national newspapers to:



Business focussed magazines



Young generation focussed magazines



Young generation focussed magazines

Adverts are changing consumers attitudes

Adverts tested in 6 European countries by IPSOS

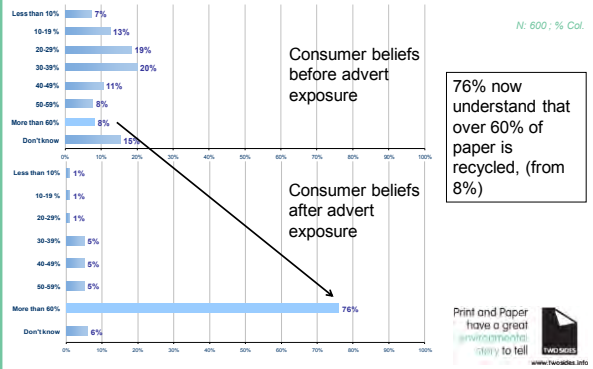
After exposure to the adverts:

- Improvement of 18%, from 20% to 38%, of consumers who believe that print and paper is the sustainable way to communicate
- Reduction of 8%, from 80% to 72%, of those who are concerned about the effect on forests by print and paper
- Improvement of 19%, from 58% to 77%, of those who understand that print and paper is based on a renewable resource
- Improvement of 18%, 20% to 38 %, of people who believe that paper records are more sustainable than electronic storage of information

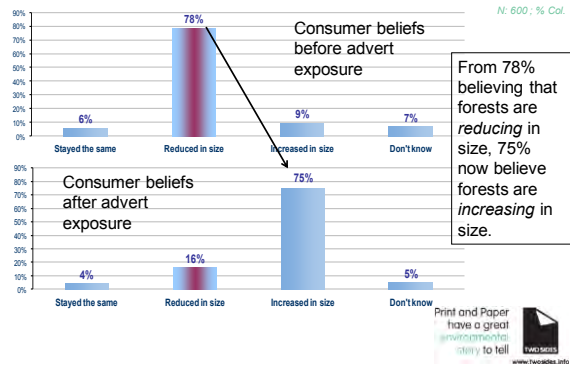
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Adverts are changing consumers attitudes



Adverts are changing consumers attitudes



And do we face 'label overload'?

The Worlds first eco label, 1978



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And today



And now there EUTR!

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Paper,
Essential for Life's big moments

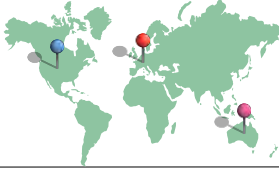
<http://www.twosides.info/video.asp?videoID=27>

PRINT AND PAPER
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ENVIRONMENTAL
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