

NAPM

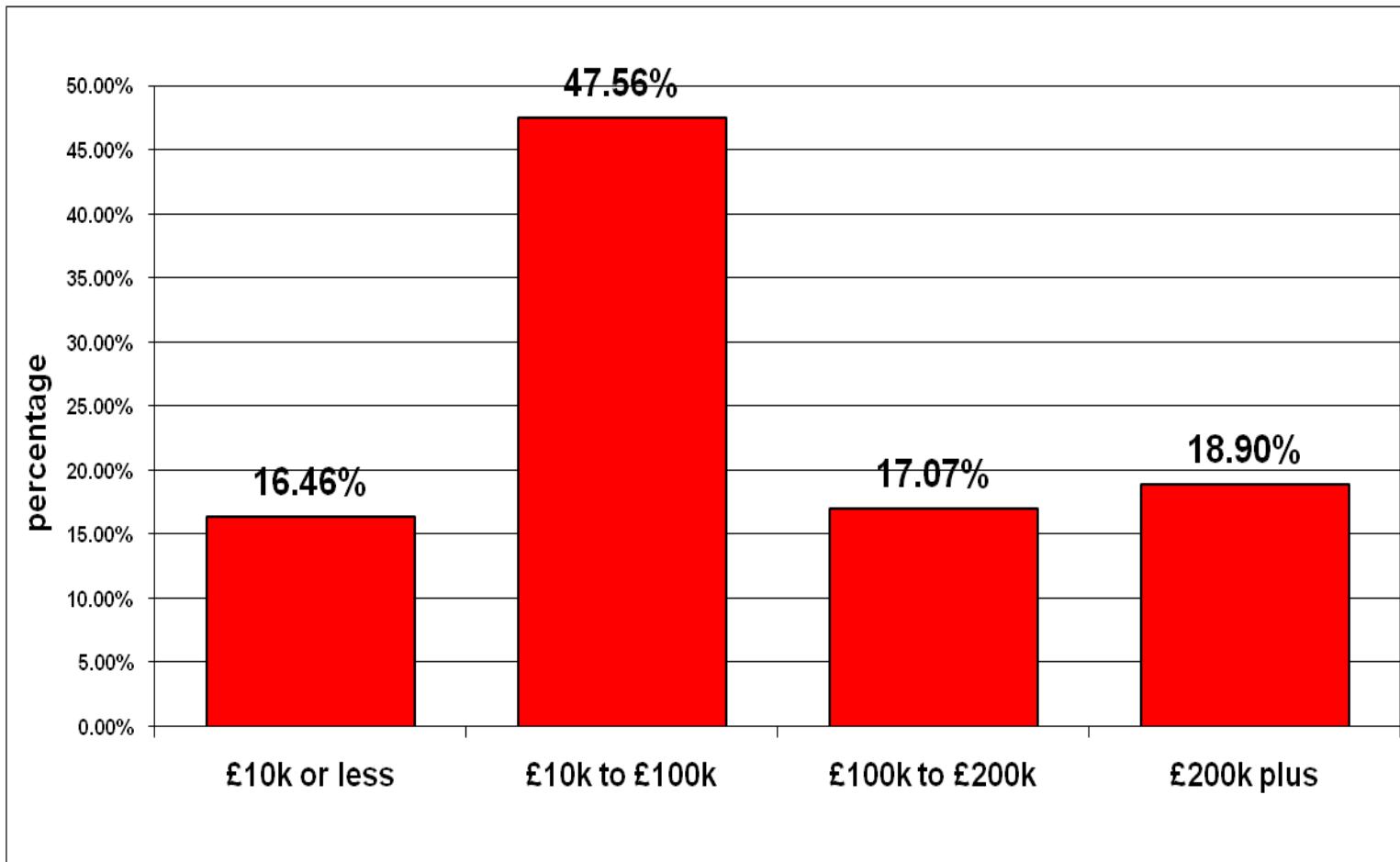
The NAPM Survey of Media Buyers

**Do environmental issues affect
your paper purchasing decisions?**

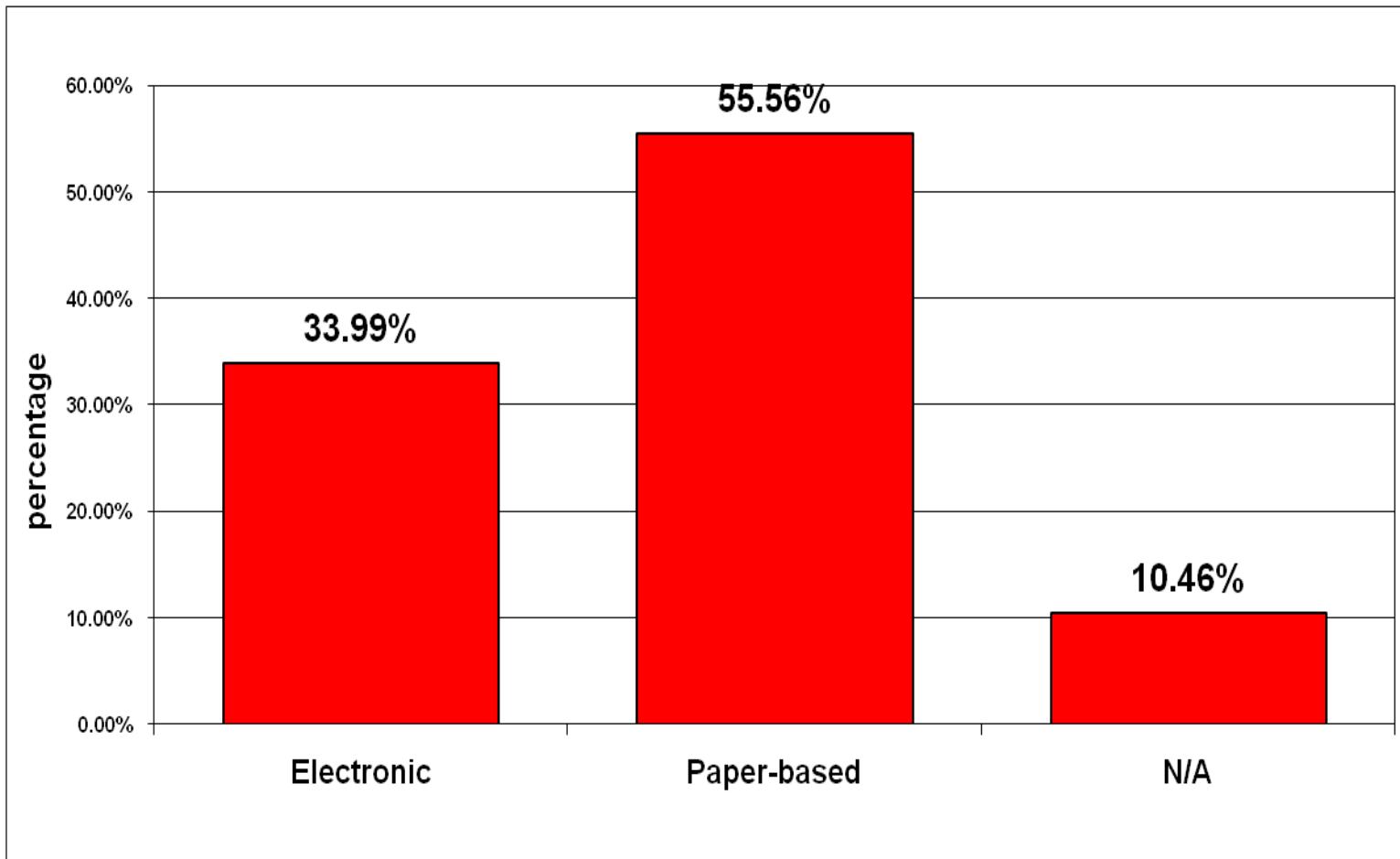


www.twosides.info

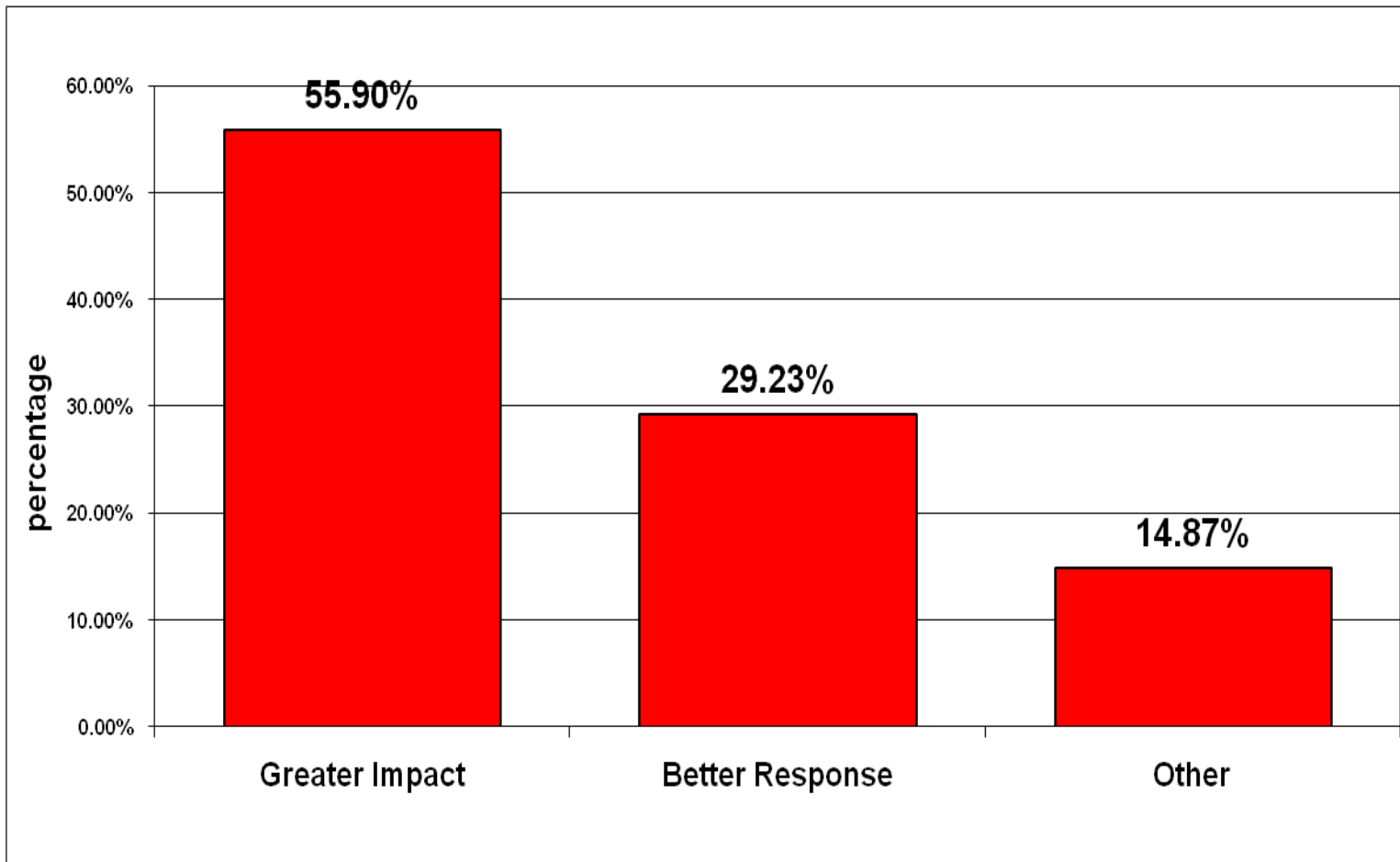
Q1 - Approximately how much does your organisation spend on procuring print/paper each year?



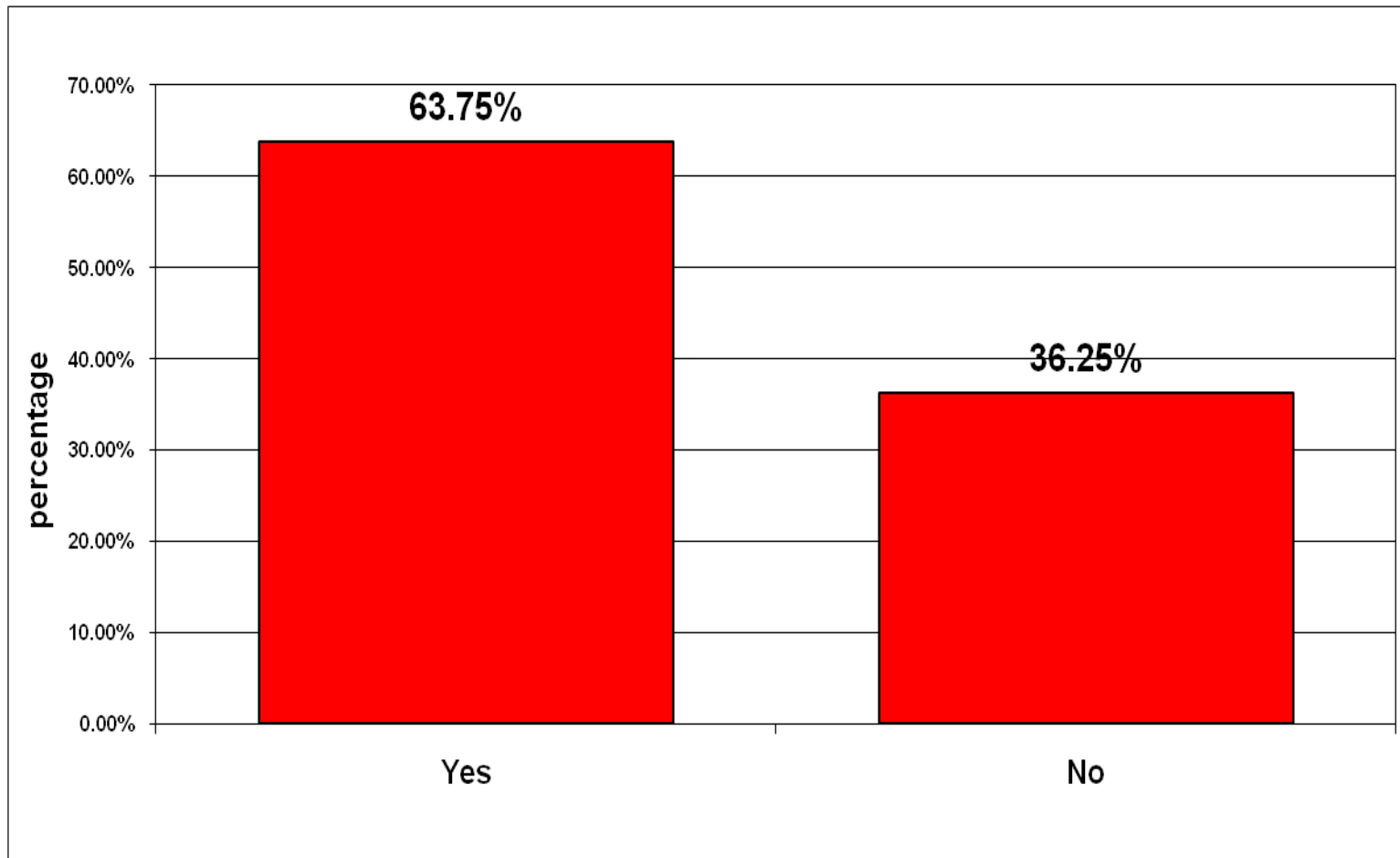
Q2 - What is your medium of choice for direct marketing communications and activities?



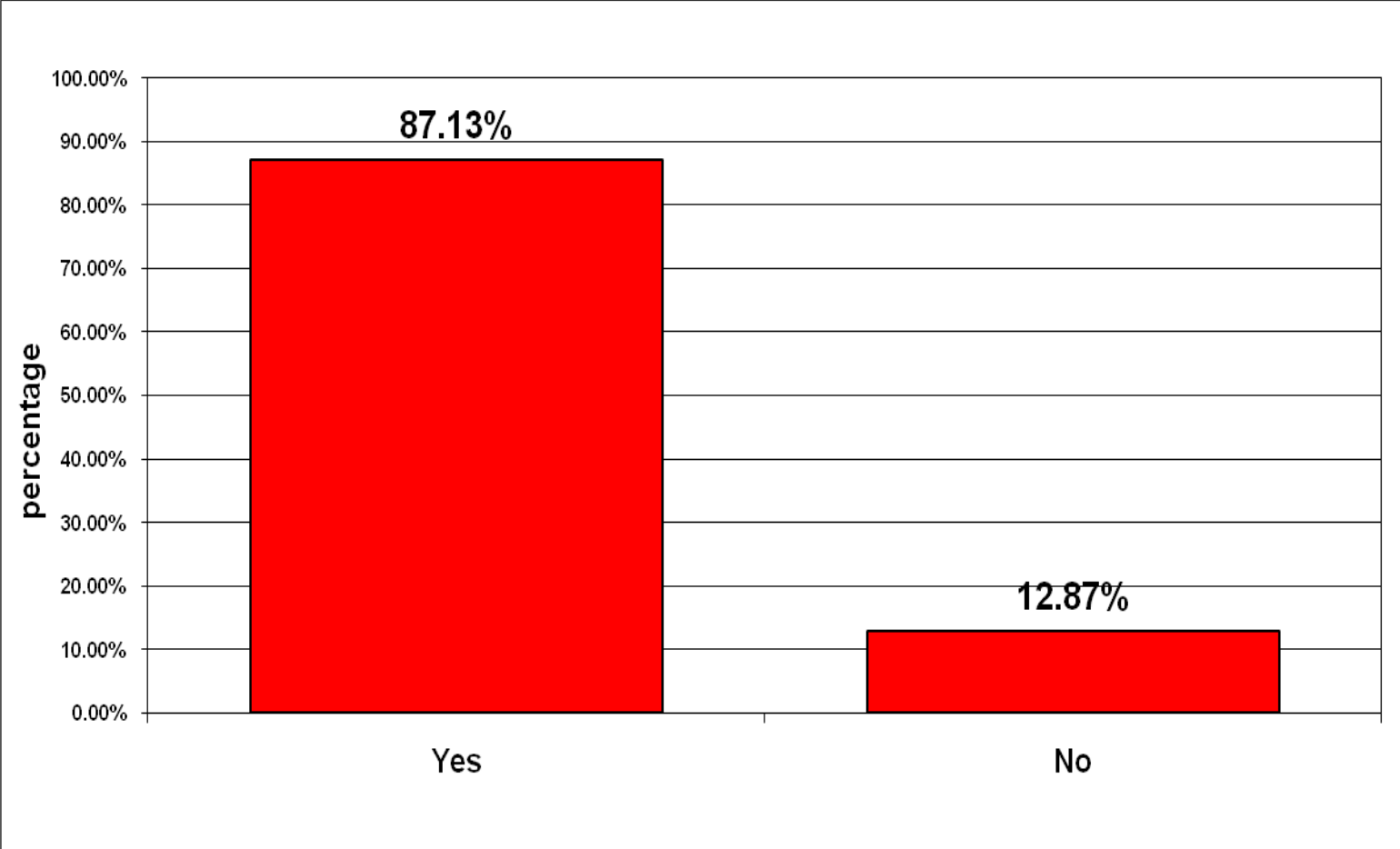
Q3 - What are the main reasons for choosing paper over electronic media for sales/marketing communications tools?



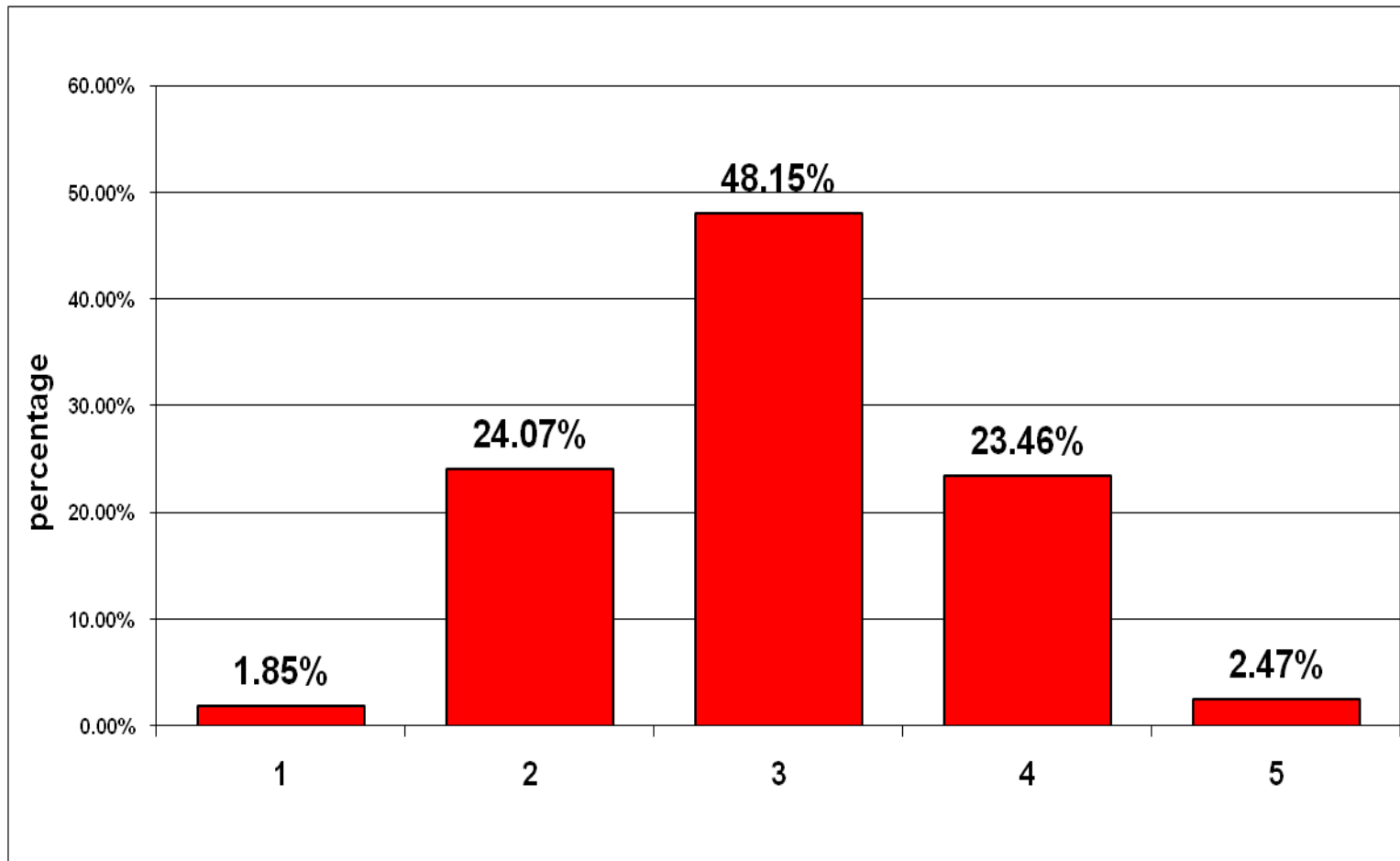
Q4 - Does your organisation have a corporate responsibility or environmental policy?



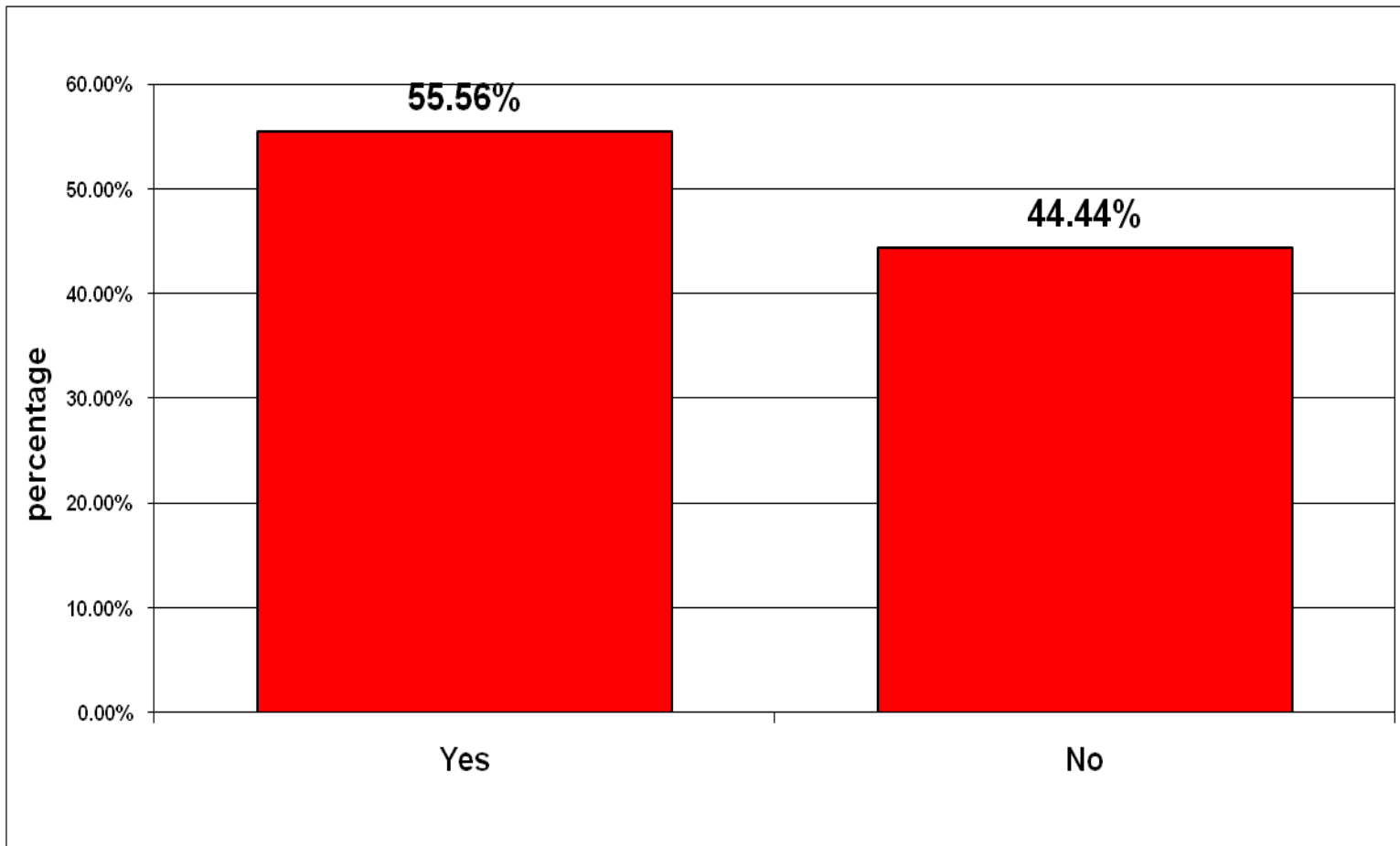
Q4a - If yes to Q4 does this affect your paper purchasing decision?



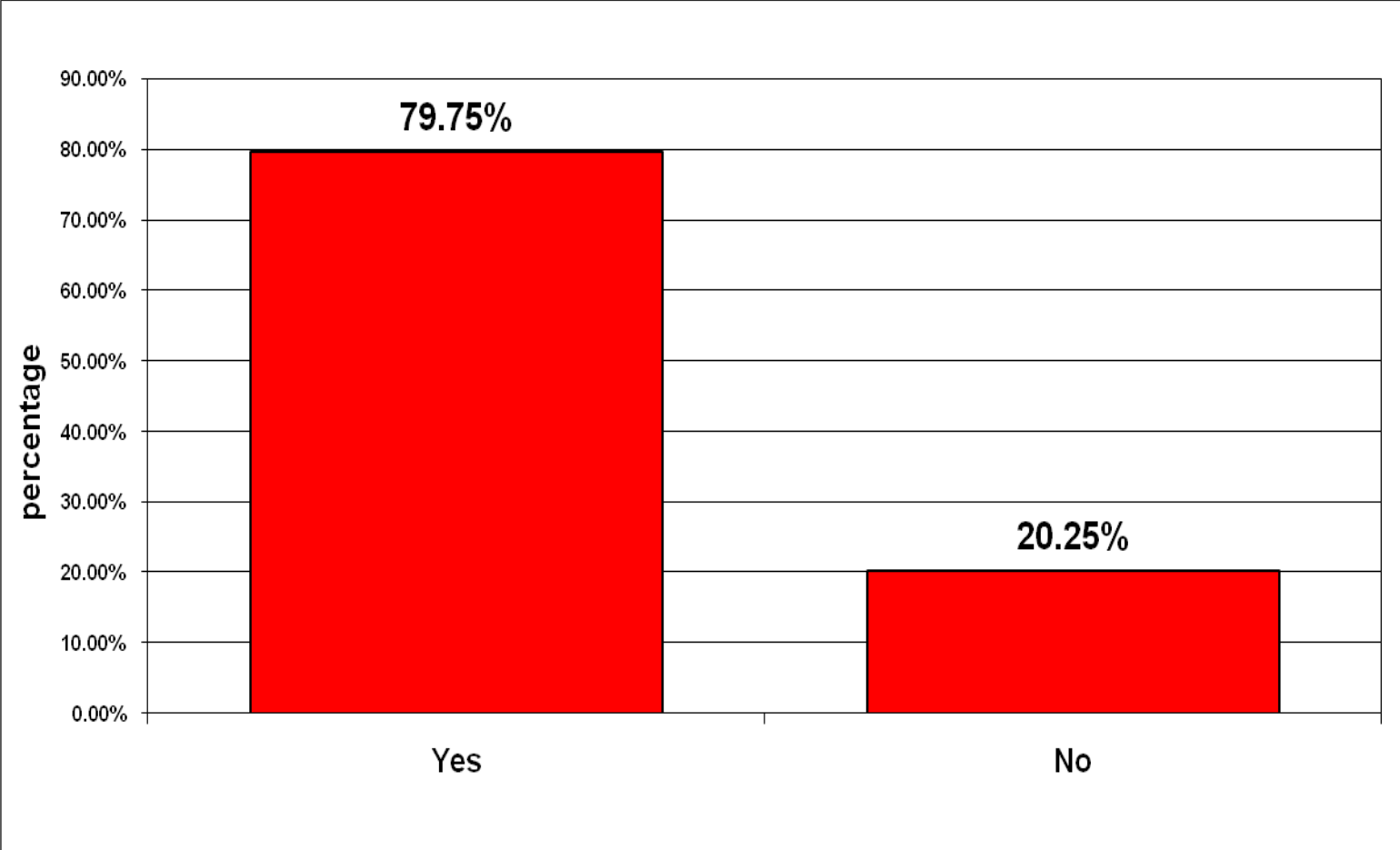
Q5 - How much of a negative impact do you think paper has on the environment? Please grade your answer 1- 5 with 1 = no impact



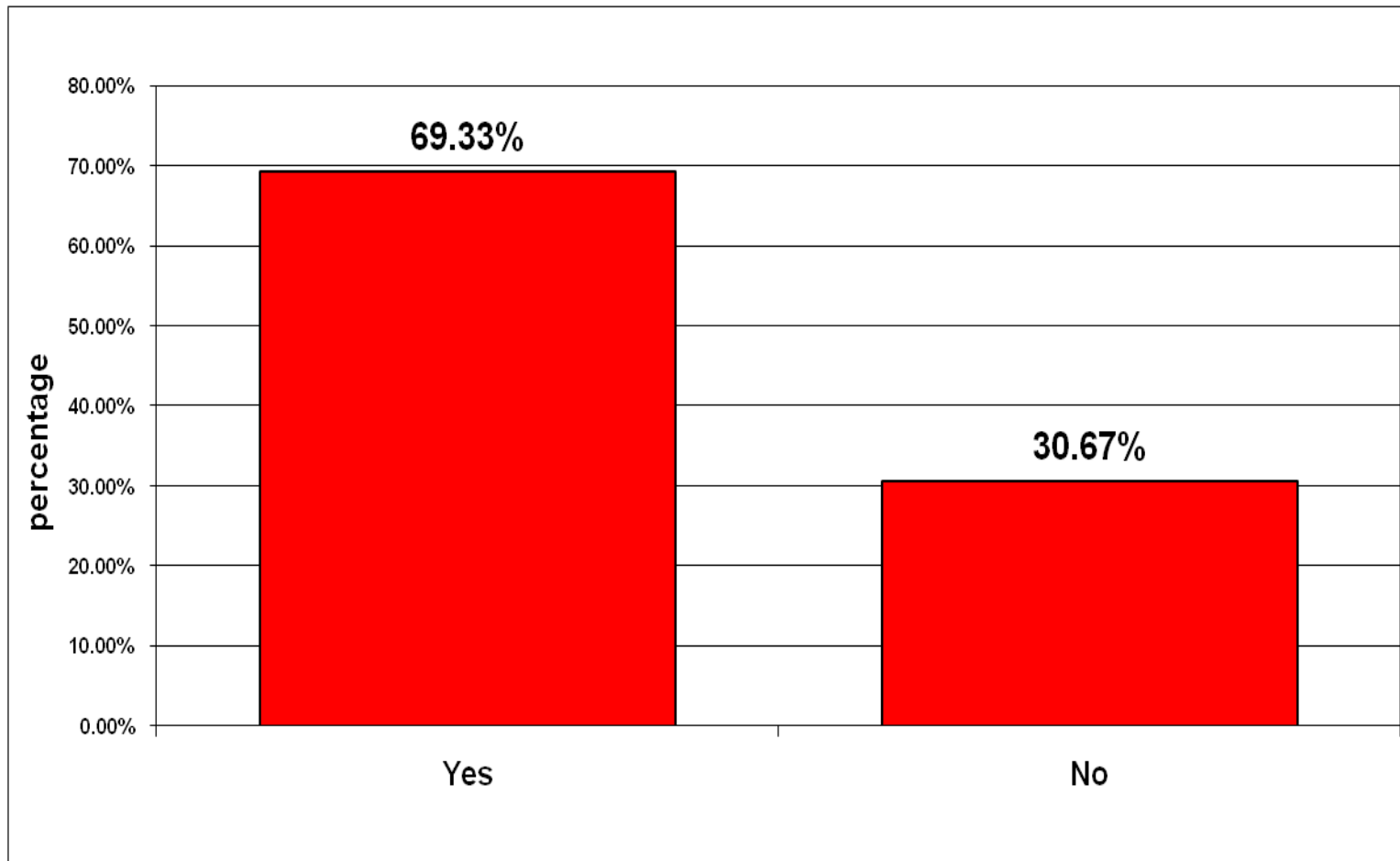
Q6 - Does your perception of paper's environmental impact play a role in your decision to specify & use paper rather than alternative media?



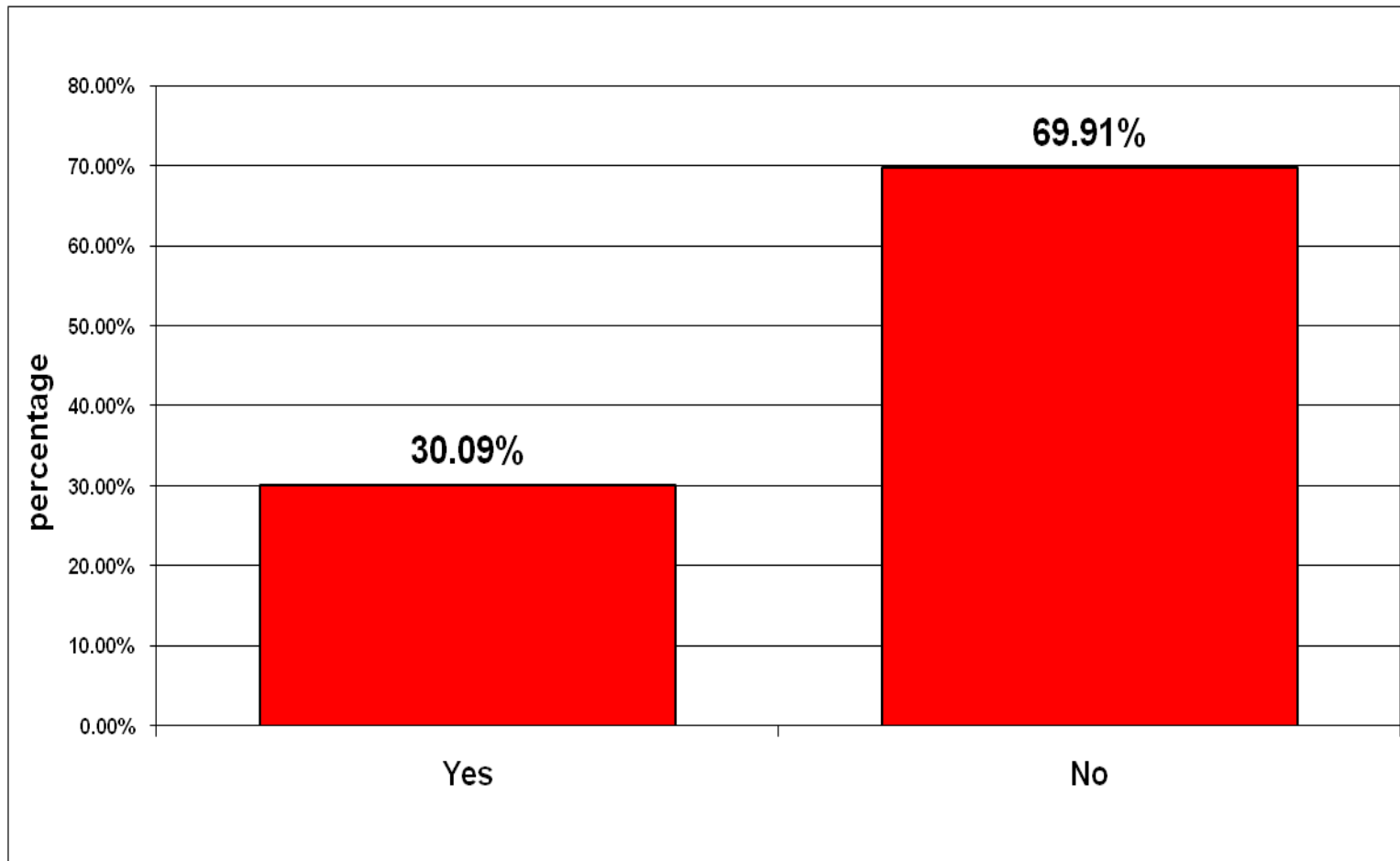
Q7 - Does your perception of paper's impact on the environment play a role in your paper purchasing decisions?



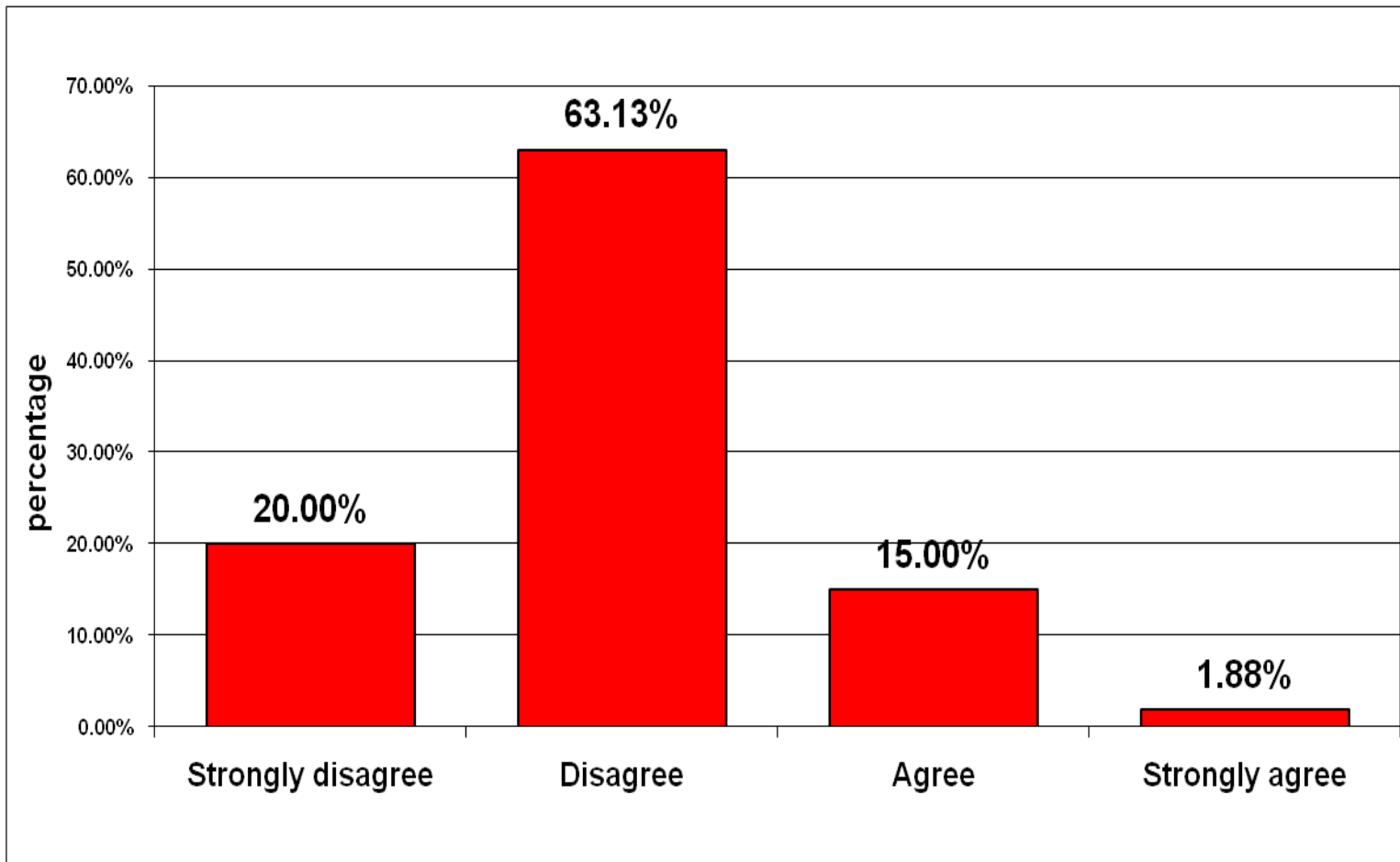
Q8 - have you or your organisation ever taken the decision to pursue other forms of communication to reduce paper use?



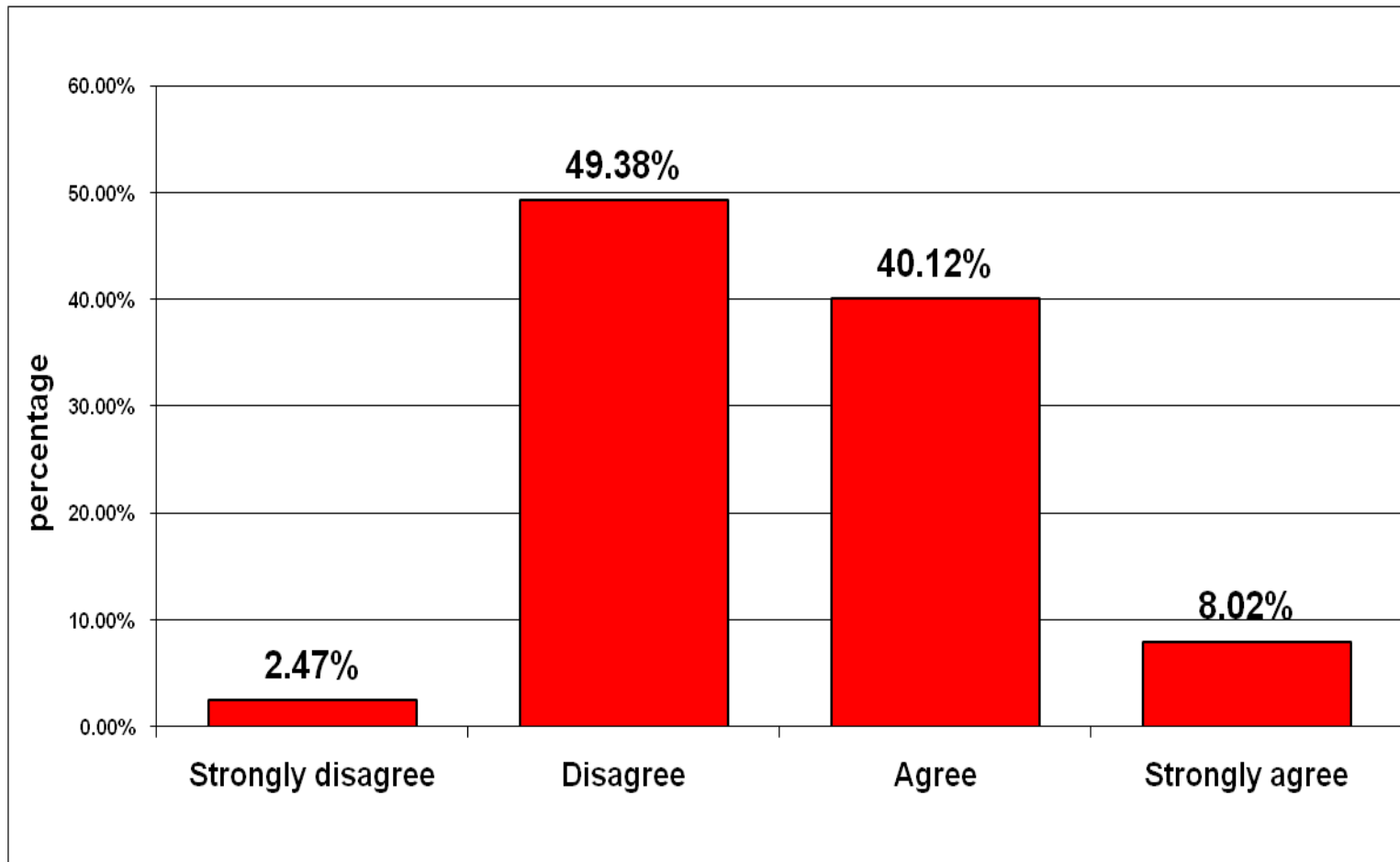
Q8a - If yes to Q8 was this an environmental-based decision?



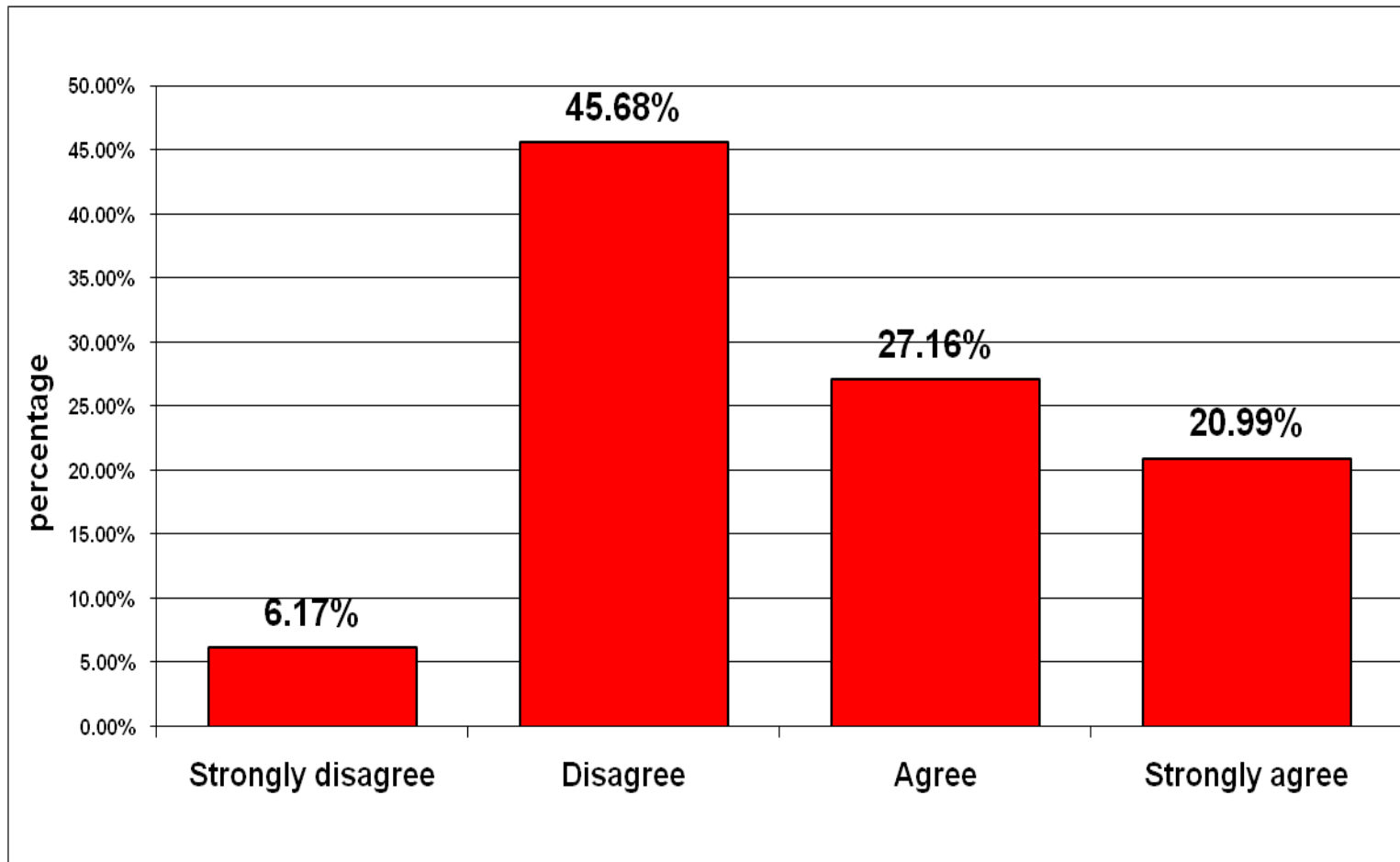
Q9 - Using paper is more environmentally friendly than digital communications?



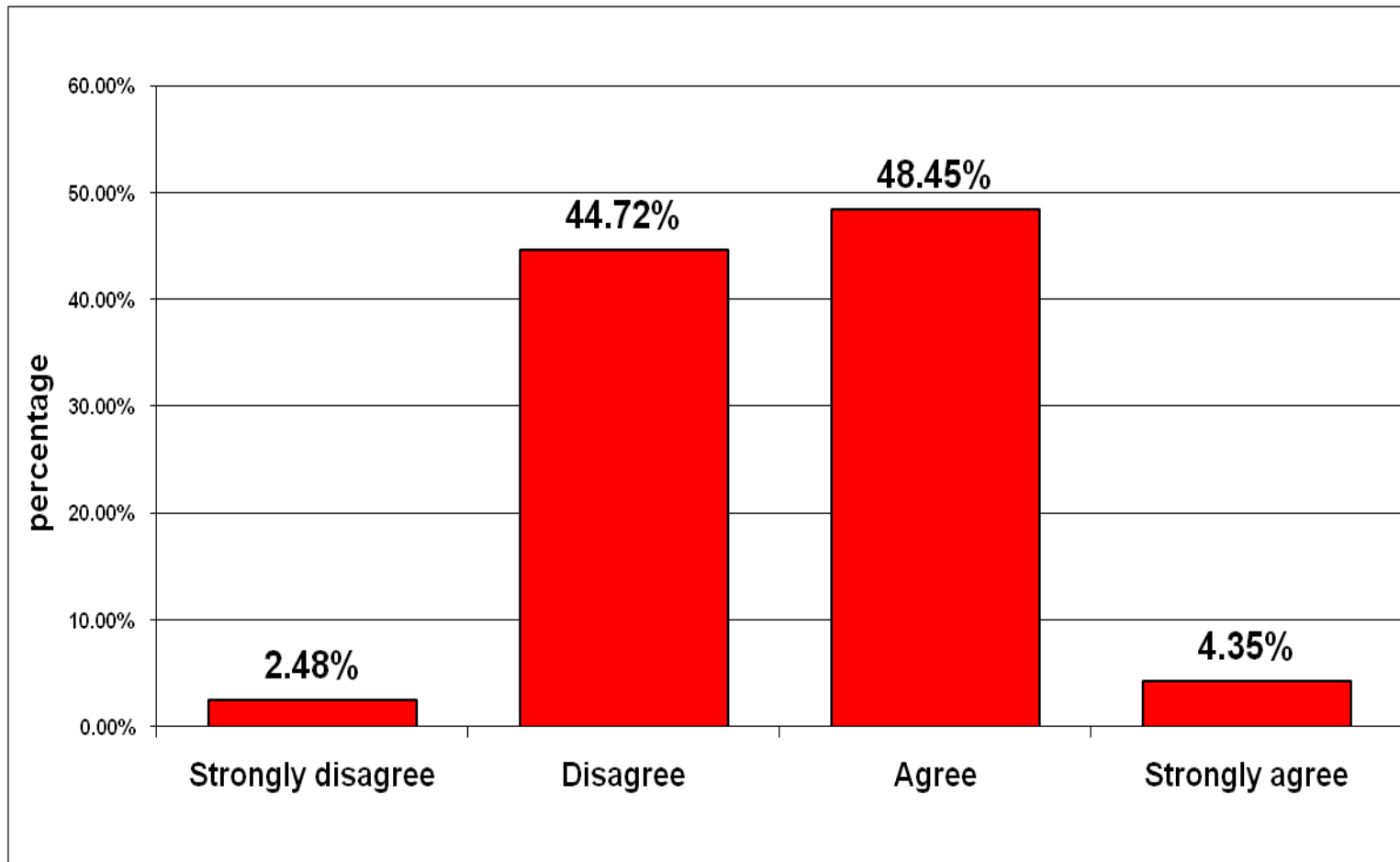
Q9a - Using paper has a negative impact on the environment ?



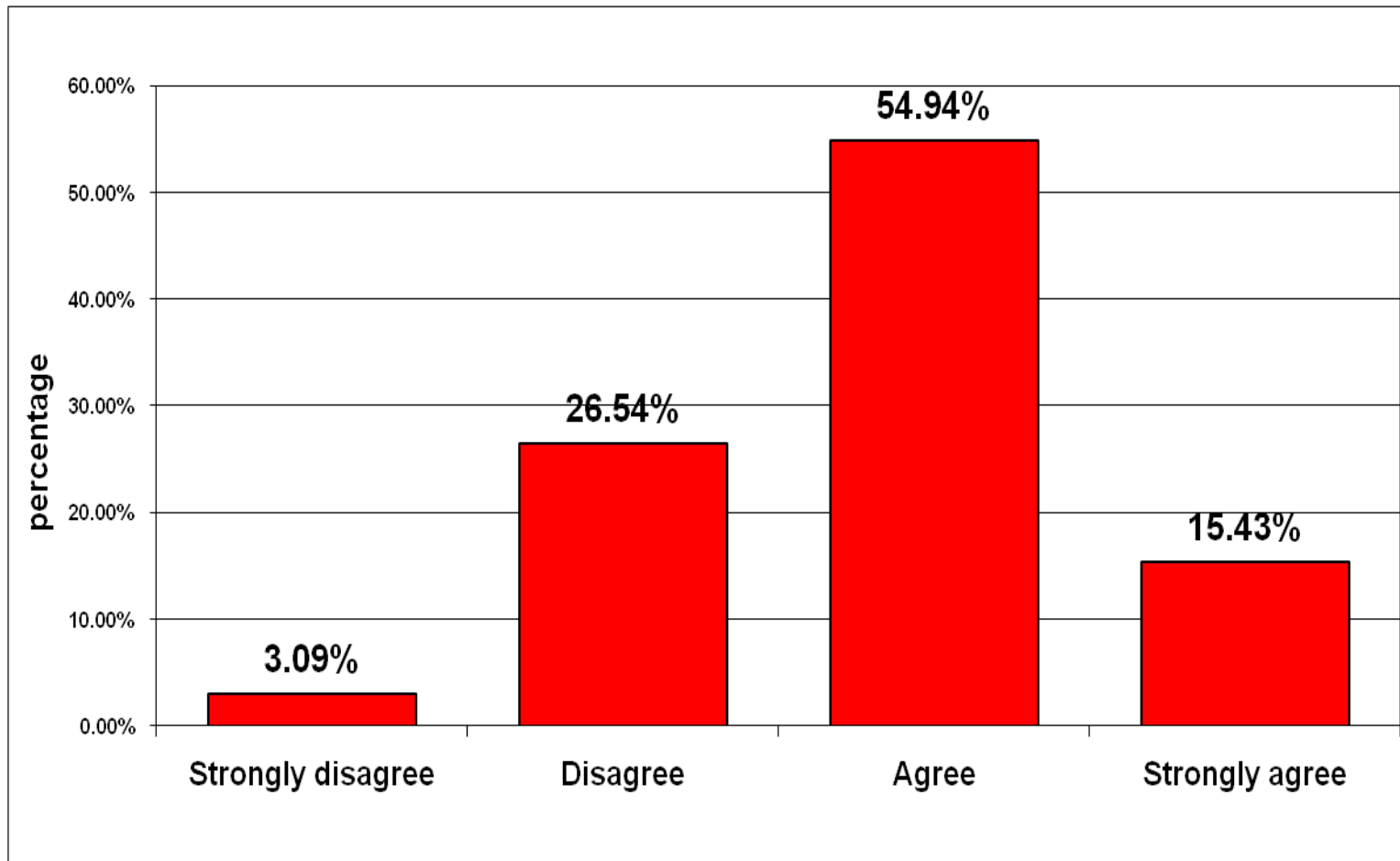
Q9b - Paper production is a major cause of deforestation?



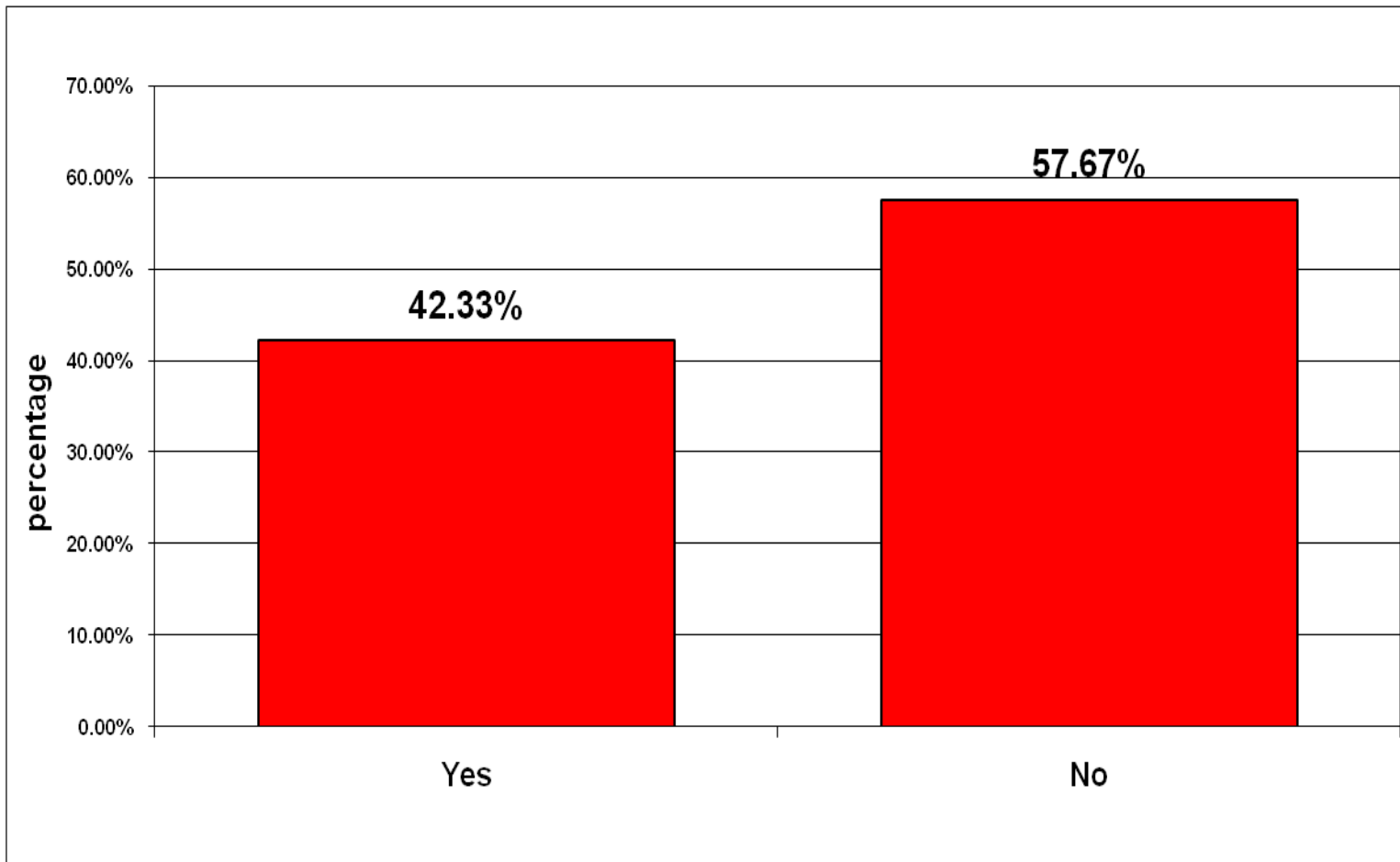
Q9c - Paper has a heavy carbon footprint?



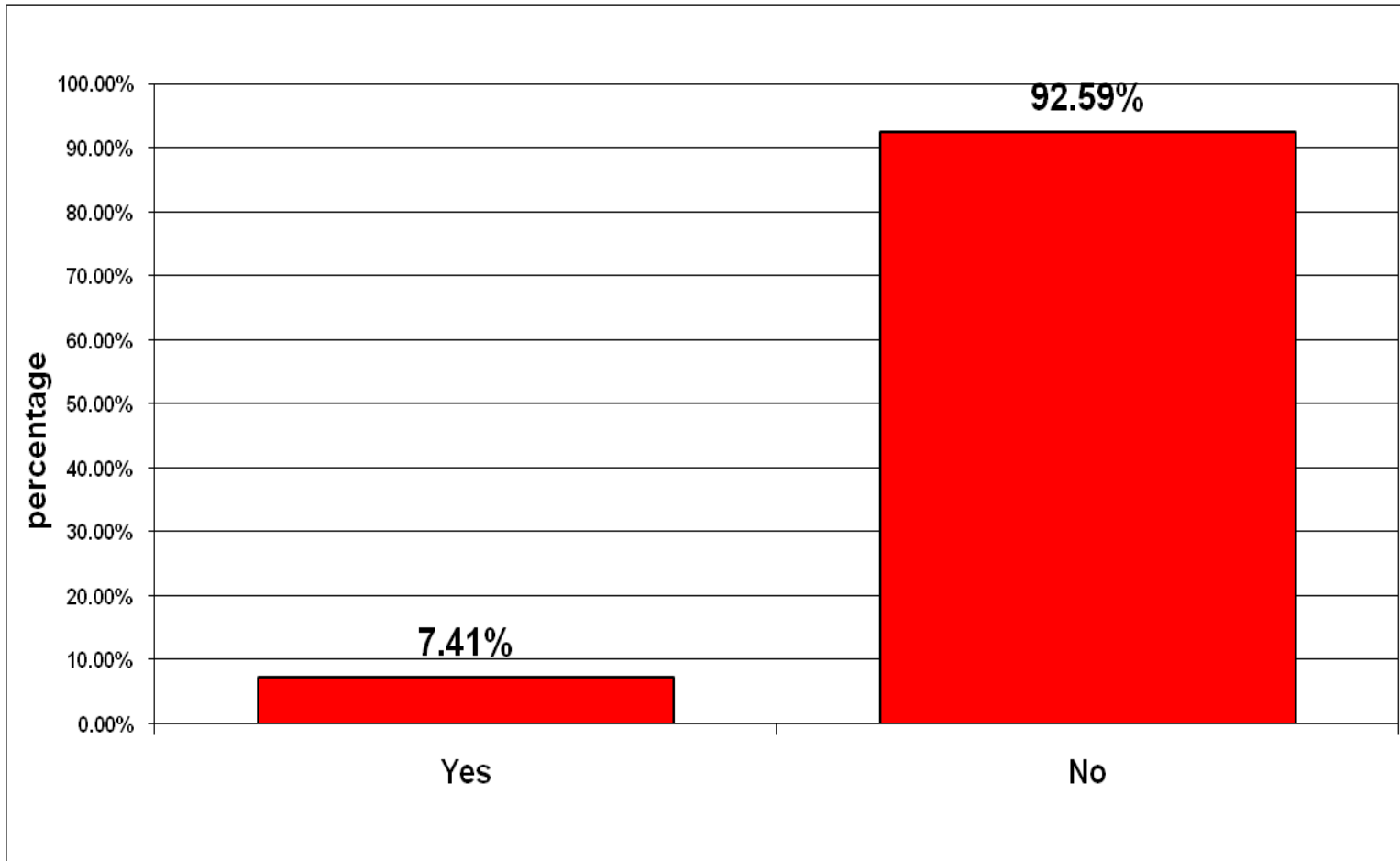
Q9d - Recycled paper is better for the environment than virgin paper?



Q9e - Do you believe you know enough about paper's carbon footprint and environmental impact to make informed paper purchasing decisions?



Q9f - Do you think the general public is well informed about the environmental impact of paper?



The NAPM Survey of Media Buyers

Key findings:

- **56%** preferred paper based communications for greater impact
- **80%** admit that environmental considerations play a role in the paper purchasing decision
- **48%** believe that paper production is a major cause of deforestation
- **48%** believe paper has a negative impact upon the environment



The NAPM Survey of Media Buyers

Key findings, continued:

- **70%** believe that recycled paper is better than virgin fibre grades
- **58%** do not know enough about paper's carbon footprint and environmental impact to make purchasing decisions
- **93%** believe the general public is not well informed about paper's environmental impact



We believe that.....

PAPER HAS
A GREAT
ENVIRONMENTAL
STORY TO TELL

.....but how?



www.twosides.info

‘Paper is a pleasure to use’

Paper’s unique array of practical and aesthetic qualities simply can’t be matched by using electronic alternatives.

“Our mood will improve by up to 29% if exposed to a positive tactile feeling”

Source: Royal Mail

“Direct mail is the most responsive advertising medium with 60% of consumers responding to it”

Source: DMIS: Consumer Advertising Trends 2004

56% of respondents in a recent survey said Paper and Print is the preferred media for sales and product brochures.

Source: NAPM Survey of media buyers, July 2008

The truth is, paper has a great deal going for it!



www.twosides.info

Environmental concerns are at the top of almost every agenda

The Myths and Misconceptions about our industry have increased

Over 90% of media buyers agree the general public lacks understanding of the environmental impact of paper.

Source: NAPM Survey of media buyers, July 2008

Yet:

“The paper industry has eight representatives in the UN’s list of the world’s 100 most sustainable companies, more than any other industry”

Source: Promotion of Paper, Australian Paper Industry Association, 2008

“There aren’t many industries around that can aspire to becoming genuinely sustainable. The Paper Industry, however is one of them, it is inherently sustainable”

*Source: Jonathan Porritt Chairman
UK Sustainability Development Commission & Founder,
Forum for the Future*



www.twosides.info

‘The Paper Industry is facing up to its responsibilities’

- Paper isn't the enemy of the environment and it doesn't have to cost the earth. While paper does use trees, its production does consume energy and too often, waste paper ends up in landfill sites, it is also one of the few truly renewable and recyclable raw materials we have.
- The Paper Industry is facing up to its responsibilities and investing heavily in all areas of production and sourcing of raw materials to minimise its environmental impact.

“Forestry, paper and packaging are among the most sustainable industries in existence”.

Source: CEO perspectives 2008. Price Waterhouse Coopers



www.twosides.info

The 'Two Sides' initiative must accept that paper usage will in future come under scrutiny

The NAPM strongly supports:

- *Responsible Production*
- *Responsible Print and Design*
- *Responsible Consumption*
- *Responsible Disposal*

“Almost half of the timber harvested from the world’s forests is used to make paper products, so the paper industry has a huge opportunity to make sure that those forests are responsibly managed and will be here for generations to come”

Source: FSC



www.twosides.info

Myths and Facts

THE MYTH: Making Paper Destroys Forests

THE FACT: **No**, in fact, the opposite is true.

The main constituent of paper is cellulose fibre which generally comes from trees, but this doesn't automatically equate to the destruction of forests. Papermaking and other industries that depend on trees need thriving forests. It's in their interest.

48% of respondents to a recent survey thought paper was a major cause of deforestation.

Source: NAPM Survey of media buyers, July 2008



www.twosides.info

THE MYTH: Making Paper Destroys Forests

“Deforestation is generally occurring in the tropics but for a variety of reasons. The main cause of deforestation is either for agriculture or for domestic fuel requirements, which between them account for almost half of the trees cut down worldwide”

Paper and the Environment, ATS Consulting, August 2007

“One of the many unique things about paper is that its main raw material, is renewable. Combined with the sustainable way that European forests are managed, this means that 33% more new trees grow in Europe each year than are felled”

Source: CEPI; forest factsheet no.2

“When people use more paper suppliers plant more trees. If we want bigger commercial forests, then we should use more paper not less. Our policies should directly protect important wildlife habitats, not try to reduce our demand for paper”

Source: Edward L Glaeser, professor of economics at Harvard



www.twosides.info

Myths and Facts

THE MYTH: Paper is bad for the environment

THE FACT: No, paper is one of the few truly sustainable products.

But:

“48% of respondents in a recent survey of media buyers believed that using paper has a negative effect upon the environment”

Source: NAPM Survey of media buyers, July 2008

For every tree that is logged in managed forests, three to four trees are replanted. And as young trees grow, they absorb CO₂ from the atmosphere. Furthermore, as a wood product, paper also continues to store carbon throughout its lifetime.



www.twosides.info

THE MYTH: Paper is bad for the environment

Key Facts:

- *Paper production is not a major cause of deforestation*
- *Industrial wood, pulp and paper production saves forests*
- *Paper is a fully renewable, sustainable resource*
- *For every tree logged in managed forests, 3-4 are replanted*
- *Forest certification promotes wood from managed forests*
- *We plant more trees than we harvest for making paper*
- *The annual increase of forest cover in Europe is equivalent to more than 1.5million football pitches.*

(Source: CEPI)

“The amount of Carbon stored in products is increasing by about 540 million tons of CO₂ per year”

Source: NCASI Special Report 07-02



www.twosides.info

Myths and Facts

THE MYTH: The paper I use consumes a vast amount of energy

THE FACT: **It doesn't.** People mistakenly think paper making is a voracious energy consumer. But look more closely and you'll discover some surprisingly small statistics about paper and energy



THE MYTH: The Paper I use consumes a vast amount of energy

As industries go, paper making is a large scale undertaking and you'd expect it to generate some frightening statistics. It doesn't. On average it takes 500 kilowatt-hours (kWh) of electricity to produce 200kg of paper; the average amount of paper that each of us consume each year. Does that sound a lot? It's the equivalent to:

- *powering one computer continuously for five months*
- *burning a 60w light bulb continuously for one year*
- *the energy consumed by a typical household leaving its electronic equipment on stand-by for a year.*

Source: Paper & the Environment, ATS Consulting August 2007



www.twosides.info

Myths and Facts

THE MYTH: Paper has a high carbon footprint

THE FACT: It's not as high as you might think!

While the main raw material of paper, trees, is a vast carbon store and the prime absorber of carbon dioxide from the atmosphere, the precise carbon footprint of the paper cycle is difficult to pinpoint as it depends on how the paper is made and the source of energy used in production.

Nuclear, hydro, biofuel and geothermal energy, heavily used by some paper making countries, are all low carbon, while fossil-fuels are carbon intensive.



THE MYTH: Paper has a high carbon footprint

“Producing 200kg of paper, the average we each use every year, creates between 130-250kg of CO2 depending on the source of energy. This is comparable to many other small scale domestic activities, and is roughly equivalent to the CO2 produced by an average family car over a distance of 600 miles”

Source: Paper & the Environment, ATS Consulting, August 2007

“A sustainably managed forest can be relatively carbon neutral if logging is balanced with re-growth”

Source: The Sustainable Procurement of wood & Paper products: An introduction

“Globally, individual forestry is estimated to result in the absorption of 1 billion tonnes of CO2 per annum”

Source: Australian Paper Industry Association (APIA)

“Reading a newspaper can consume 20% less carbon than viewing news online”

Source: Swedish Royal Institute for Technology



www.twosides.info

THE MYTH: Paper has a high carbon footprint

Key Facts

- The paper industry is one of the biggest users of renewable, low carbon energy
- Half the energy used to make paper in Europe comes from renewable sources (source awaited)
- Very often, the water used to make paper is cleaner when it comes out of the mill than when it goes in. (source awaited)
- Growing forests absorb carbon dioxide helping to counter the Greenhouse Effect.
- Reading a newspaper every day produces 20% less carbon than viewing a PC for just 30 minutes.



Myths and Facts

THE MYTH: Recycled paper is always better for the environment than virgin paper

THE FACT: Not necessarily.

According to a survey of professional media buyers, 70% of respondents perceived recycled paper to be better for the environment than virgin paper.

Source: NAPM Survey of media buyers, July 2008

“Both virgin and recycled paper products can have an equally strong environmental argument. Forests are part of the cycle that helps remove CO2 from the atmosphere. This extends from trees to wood and paper products, which continue to store the carbon and help to reduce climate change. The fact that paper products are recyclable and renewable means that their lifecycle can be extended, prolonging this benefit and reducing waste into the bargain”

Source: CEPI: Forest Fact sheet no: 2



www.twosides.info

Myths and Facts

THE MYTH: Paper contributes significantly to landfill

THE FACT: While paper does still contribute to landfill, the amount is reducing dramatically.

“The paper industry is Europe’s largest recycler and is one of the greatest environmental success stories of recent years.

Today, the average recycling rate across European countries is over 62 per cent, representing more than 50 million tonnes of used paper collected each year .

Paper fibres can be recycled up to six times, and recycling is certainly the best way to keep waste paper out of landfill”

Source: CEPI



www.twosides.info

THE MYTH: Paper contributes significantly to landfill

“Paper fibres can be recycled up to six times”

(source: CEPI)

“Paper is truly sustainable, with waste fully recoverable ready for recycling into new paper.

Since 2001, there has been a 60% increase in the amount of household waste paper and card collected for recycling”

(source: DEFRA/ Official municipal waste data for England)

“The UK exports over 5 million tonnes of waste paper for re-processing”

(source: WRAP 2006)



www.twosides.info

An aerial photograph of a dense forest, likely a coniferous forest, with a teal overlay at the bottom. The teal overlay contains several dark teal silhouettes of evergreen trees. The text "We really do believe that:" is written in white, sans-serif font across the middle of the image. The text "PAPER HAS A GREAT ENVIRONMENTAL STORY TO TELL..." is written in dark teal, sans-serif font in the bottom left corner of the teal overlay.

We really do believe that:

PAPER HAS
A GREAT
ENVIRONMENTAL
STORY TO TELL...

Summary

- Paper has a good environmental story to tell
- We need to tell that story with a common voice and with determination
- We need to sustain our commitment to our story
- We need ongoing industry funding achieve these objectives



PAPER HAS
A GREAT
ENVIRONMENTAL
STORY TO TELL



www.twosides.info