Trend Tracker 2025 Consumer Survey

Challenges And Opportunities For The Print And Paper Industry

About The Survey

The Two Sides Trend Tracker 2025 is a comprehensive global survey investigating consumer attitudes toward paper-based products.

Commissioned by Two Sides and conducted by independent research company Toluna, the study was carried out online in January 2025. The 2025 research includes national representative insights from 12,400 consumers from Europe (Austria, Belgium, Denmark, Finland, France, Germany, Italy, Norway, Sweden and the United Kingdom) as well as Argentina, Australia, Brazil, Canada, New Zealand, South Africa, the United States.

Focus Areas of the 2025 Survey:

- Environmental perceptions of paper, print, and fibre-based products
- Preferences for printed or digital communication
- Attitudes toward packaging and sustainable alternatives
- Consumer views on tissue product use and manufacturing

This document provides some of the key findings for Europe. The executive report along with the detailed PowerPoint slides of the European 2025 Trend Tracker research, together with detailed findings broken down by country, age and gender, and supporting marketing assets, are 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-2025**

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

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Key Findings:

Environmental Perceptions

- Just **16%** of consumers recognise that European forests are growing in size.
- Only **25%** understand the paper recycling rate exceeds 60% in Europe.

Media Habits

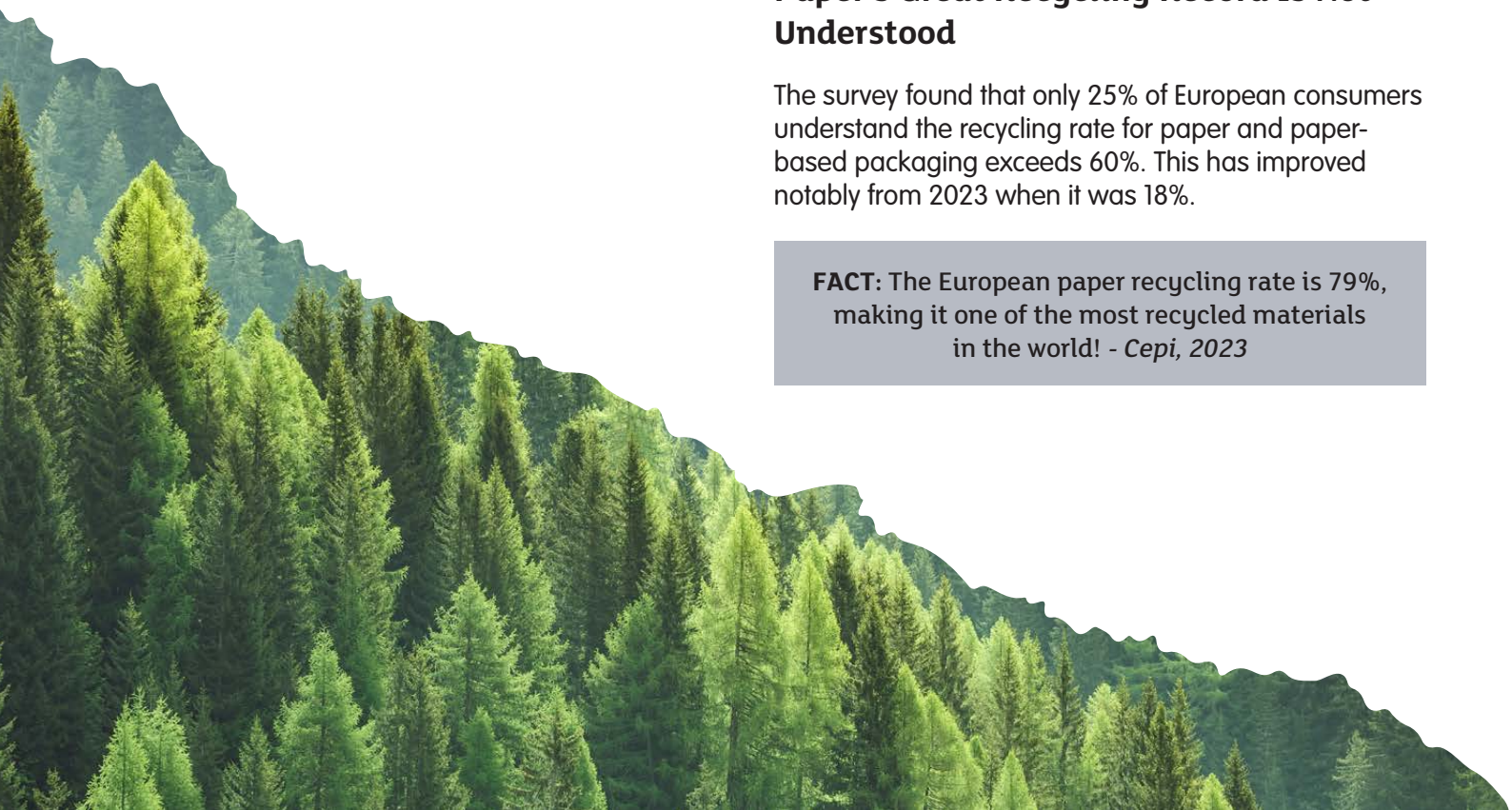
- **76%** want the right to choose how they receive their bills and statements; printed or electronically.
- **63%** prefer too read books in print.
- **58%** don't pay attention to most online marketing adverts.
- **58%** believe children learn more when reading printed materials, compared to digital.
- **48%** prefer to read magazines in print.

Packaging Preferences

- **53%** prefer paper packaging due to a belief that it is better for the environment.
- **62%** prefer products ordered online to be delivered in paper packaging.

Tissue Products

- **41%** worry about the environmental impacts of tissue products.
- **42%** believe that tissue products are wasteful.



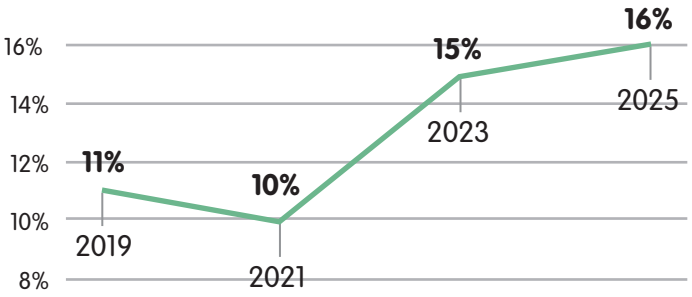
Environmental Perceptions

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.

Paper is one of the most sustainable products we use today - derived from a natural, renewable resource, and part of a thriving circular economy. But despite the industry's progress in promoting these truths, many consumers still hold views shaped by outdated or incorrect information.

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

Consumers Who Understand European Forests Are Growing:



Paper's Great Recycling Record Is Not Understood

The survey found that only 25% of European consumers understand the recycling rate for paper and paper-based packaging exceeds 60%. This has improved notably from 2023 when it was 18%.

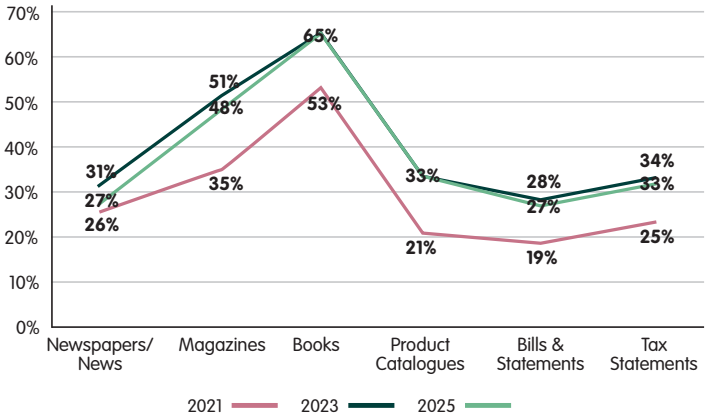
FACT: The European paper recycling rate is 79%, making it one of the most recycled materials in the world! - *Cepi, 2023*

Media Habits

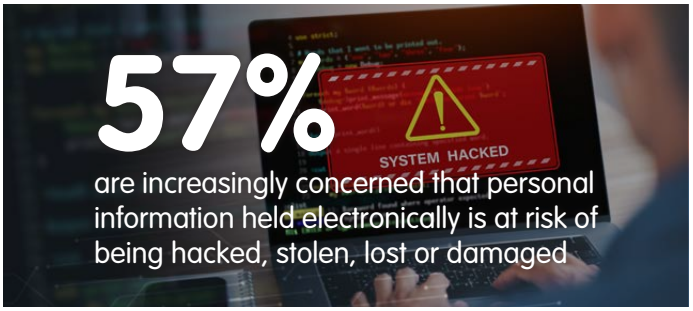
The COVID-19 pandemic brought major disruption to print media, reshaping how consumers interacted with news and printed content. As digital usage surged, many turned away from traditional print.

Now, in 2025, the survey shows that consumer preferences for print remain steady across all major categories.

Percentage Of European Consumers Who Prefer To Read In Print:



Many consumers still prefer to receive or read important documents in print rather than via digital devices, driven by a sense of security, permanence, and ease of access. For legal, financial, or medical records, having a physical copy provides a tangible reference that doesn't rely on devices, passwords, or internet connectivity. Having these important documents in print reduces the risk of missing crucial information due to overlooked emails or spam filters. Many published external reports have proven that reading on paper enhances focus and comprehension, making it easier to absorb and retain important details.

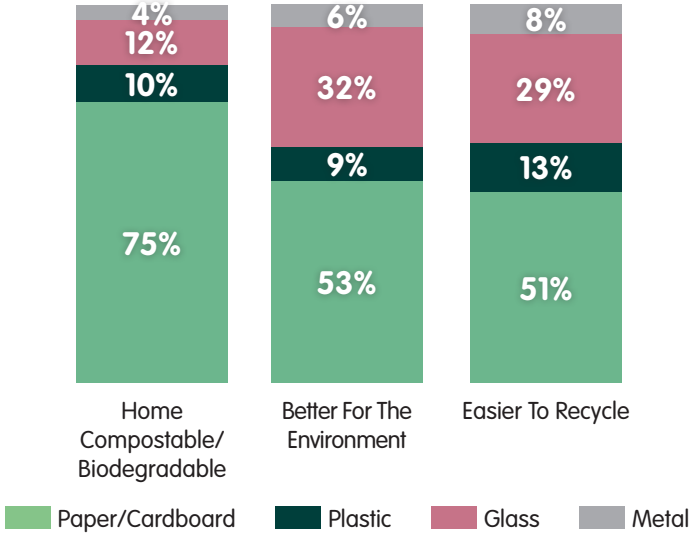


Packaging Perceptions

Paper-based packaging is increasingly recognised as the preferred sustainable packaging choice, especially as e-commerce grows. The survey shows that consumers favour paper-based packaging for its compostability, recyclability, and lower environmental impact.

Consumers were asked to select their preferred packaging material - paper/cardboard, plastic, glass, or metal - based on various important environmental, visual, and physical attributes. Paper/cardboard was the top choice in 9 categories, glass in 4, metal and plastic in 1 each.

Consumers Who Prefer Paper-Based Packaging For The Following Attributes:



Reducing Non-Recyclable Packaging - Who's Responsible?

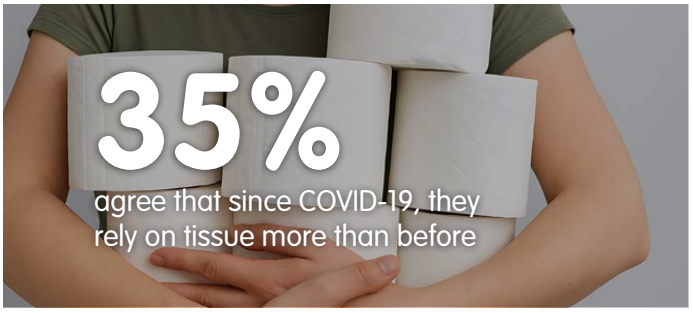
When consumers were asked to rank who they believe has the most responsibility for reducing the use of non-recyclable single-use packaging, 39% believe that governments and local authorities are the most responsible.

To register your interest in receiving the full report, visit: **www.twosides.info/trend-tracker-2025**

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 61% of consumers thinking it's better to make tissue products from recycled fibre, and 43% actively looking for recycled tissue products.



FACT: Over 90% of the wood fibre used by the industry is sourced from within Europe, with 73% of wood and 90% of market pulp coming from certified forest management sources.
- Cepi Forest Resources, 2023

Conclusions

Consumer perceptions of paper and paper-based products are improving, but misconceptions remain. The 2025 Trend Tracker reveals encouraging progress in public understanding of the sustainability of paper, yet also highlights gaps - particularly around forest growth and recycling. As environmental awareness grows, the print, paper, and packaging industry must continue to share clear, fact-based messages to challenge digital-only myths and reinforce the environmental strengths of paper.

With one of the highest recycling rates in Europe and a commitment to sustainable forestry, the paper industry's achievements are significant. However, a disconnect persists between these efforts and consumer beliefs. Ongoing communication is essential to bridge this gap.

Initiatives like Two Sides and Love Paper play a crucial role in informing and inspiring sustainable choices rooted in transparency and trust.

This headline summary presents only the key findings for Europe. For the full report, including PowerPoint slides and supporting marketing assets, visit: **twosides.info/trend-tracker-2025.**

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.

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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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