

Millennial* Survey on Paper Use and Consumption

Summary of Study Findings

INTRODUCTION With an increasing presence of the internet and digital communication channels in young people's lives, CEPI wanted to know how they saw and used paper today. Was it still part of their daily lives or a thing of the past? The objective was to gather enough information to see what future trends lay in store for the pulp and paper industry.

THE QUESTIONS

The survey focused on these three key areas:

- environmental perception of using paper
- preference and reasons of paper vs digital
- paper consumption

In addition to the quantitative questions, several qualitative questions were asked, revealing very clear insights that paper is more:

- emotional
- personal
- trusted
- official
- important

THE SAMPLE

734 young Europeans** between the age of 16 and 26 were surveyed from August to September 2011 of which 497 online and 237 on paper whilst conducting face-to-face interviews on university campus. The ages were divided into three groups: 16-18, 19-22 and 23-26 year olds. A key criteria was that each needed to be a student or having just graduated within the year.

AGE & GENDER BREAKDOWN

Age/Sex	16-18			19-22			23-26			Total		
	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total
Age/Sex	94	110	204	138	147	285	121	124	245	353	381	734

* Def: Millennial: also known as the Generation Y and can be characterised by its generally increased use and familiarity with communications, media, and digital technologies. This new generation is the next influencer of our economy so it is important to better understand their needs.

Ref: <http://en.wikipedia.org/wiki/Millennial>

** 'European' encompasses both nationality and/or residency of one European country (geographic coverage).

WHAT DO WE KNOW ABOUT THEM?

9 out of 10 young people belong to a social media network, mostly Facebook with an average of 408 'friends'.

Young women are more active on Facebook than young men in all age groups:

F M

16-18: 95% vs 90%

19-22: 96% vs 92%

23-26: 92% vs 83%

COULD THEY LIVE WITHOUT PAPER?

80.5% of young people cannot live without paper because they think it is useful (70.2%), necessary (over 50%), or they need it around (50%). Interestingly, though, 18% said they could live without paper, but did they think of all the various forms beyond writing?

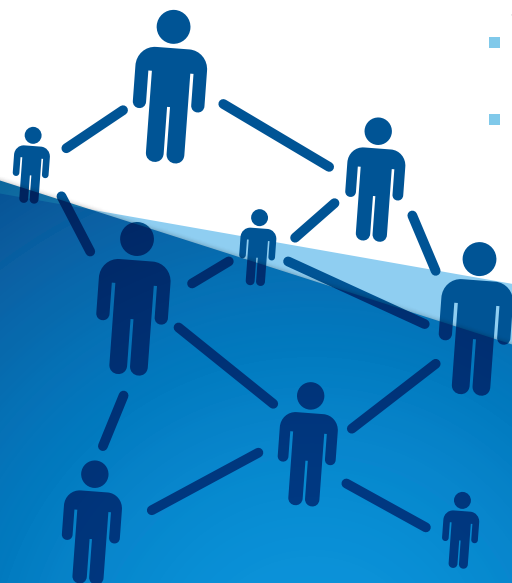


WHAT DO THEY PREFER? PAPER VS DIGITAL.

We asked them about their preference for various documents or items in their lives, here are their top choices:

They use digital technology to:

- Capture moments - digital wins hands down when it concerns **photos**, with an average of 75% preferring these in digital and up to 82% in the 16-18 year old bracket.
- Get banking information - **bank statements** are more popular, with an average 57.7% preferring the digital format.
- Getting a job - **CVs** have a 57.5% preference as an average and this goes up as age increases.
- Making sure they don't forget - 51% use digital **calendars** to remind themselves of appointments.



PHOTOS

MAPS

TAX RETURNS

WORK ASSIGNMENTS

Paper is the preferred choice on most other medium with over 66% of young people preferring the following in paper:

1. Coupons (83% of young women prefer them on paper)
2. Cookbooks
3. Tickets
4. Newspapers
5. Paychecks

NEWS

WHEN DO THEY PREFER PAPER?

When it really matters and is linked to:

- Emotion/privacy
- Trust/official
- Organisational issues

Emotional

- love note 92%
- autograph from favourite celebrity 88.6%
- birthday card 87.4%
- letter 67%
- invitation 58.8%

Trust/official

82.7% believe that digital is easier to modify therefore rely on paper to be more important from an 'official' perspective. It is more trusted, and is less likely to be falsified/hacked/alterd easily:

- Diploma 92%
- Contract 71%
- Magazines 68%

Organisation

Young people still organise themselves on paper because paper is more efficient and is faster:

- Shopping list 81%
- Note-taking in school 72%
- Note-taking at work 67%
- To-do lists 65.5%

Paper makes everything more emotional, official, trusted, confidential, secure.

WHAT DO YOUNG PEOPLE CONSUME IN PAPER?

72% of young people use paper daily to

write but more so with young women than young men:

16-18: 87.5% vs 75.5%

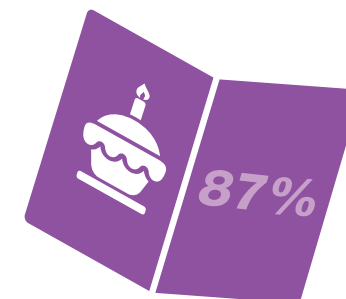
19-22: 77.2% vs 74%

23-26: 67% vs 59%

Young women 16-18 use paper to draw on a monthly basis whereas the rest never do.

There is a correlation in the frequency and types of consumption across the ages and genders. Paper is used for:

- Printing: weekly
- Writing: daily
- Photocopying: monthly
- Drawing: never (except 16-18 young women)
- Faxing: never
- Envelopes and parcels: monthly



What about the environmental impact?

Young women are more concerned about environmental impact of paper than young men and concerns grow increasingly with age. This seems in correlation with NGO's environmental campaigns targeting 19 year olds and onwards. Curiously, there is a vast absence of awareness for the environmental impact of the **web** where only 32% overall feel concerned, although this increases with age also. A confirmation that media campaigns play a part in changing this perception.

The web is generally seen as more environmentally-

friendly than paper. This may well be because young people consider it to be 'free' or at 'no cost' - none or little cost to use and therefore none or little cost on the environment. There seems to be a gratuity element attached to the web that paper does not bear.

Most young people see the recycling potential of paper and choose it over other non-easily recyclable products.



Young people in Europe live in a digital world where paper is key!



Scan this code to watch the results video
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