

2019 Campaign Impact Report



The numbers are in!

As an industry, we are proud and encouraged by the ability of the Paper & Packaging – How Life Unfolds® campaign to connect with the people we are trying to reach. New data from Isobar, a renowned market research firm, demonstrates that the paper and packaging industry's highly-targeted national consumer campaign has successfully resonated, expanding the number of consumers who enthusiastically use our industry's products to 50 million people ages 18 to 49.

Thanks in part to the campaign, more people not only feel positive about paper and paper-based packaging products but also wield enhanced buying power – making our target audience more valuable than ever.

By strategically raising more awareness and adding a stronger call to action and a more robust website, we have spurred action in favor of paper-based products, resulting in greater impact than ever.

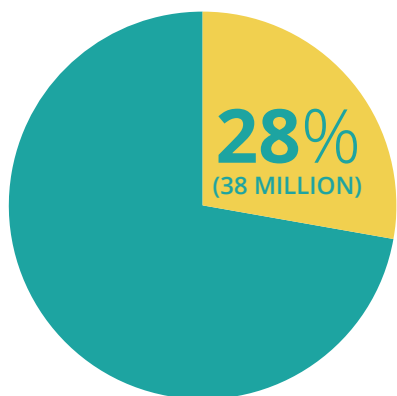


How life unfolds:



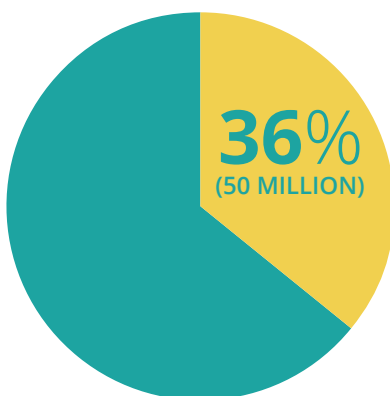
Campaign Delivers on Program Vision

NEW RESEARCH SHOWS CONSUMER AUDIENCE HAS GROWN



2014

% of consumers who are Expressives



2019

% of consumers who are Expressives

OUR AUDIENCE'S SPENDING POWER HAS GROWN, TOO!

These 50 million consumers – a mix of Gen Z, Millennials and Gen X — are purchasing more of our products than before the campaign began five years ago.



49%
of grocery trips



47%
of book purchases



51%
of documents printed at work and home

Source: Isobar, 2019 Segment Research. Values are based upon a weighted sample based on census data.

MEET YOUR EXPRESSIVES



Audience segmentation allows us to create a custom consumer target audience whose attitudes and behaviors most closely align with consumption of industry products. We call them Expressives, consumers 18 to 49 years old who are decision makers at work and at home and strongly identify as:

- Career-focused
- Following latest trends
- Enjoy being center of attention
- Original
- Creative
- Environmentally-conscious
- Community-oriented
- More educated
- More affluent

And they are fans of paper and paper-based packaging!

SUPPLY CHAIN DECISION MAKERS ARE A KEY CAMPAIGN AUDIENCE



Through business-specific magazines, targeted digital ads on business platforms like LinkedIn, along with our all-new Sales Channel Toolkit, the campaign makes customers throughout the supply chain feel good, too. That is why we focus on a dual target audience that includes business decision makers, people like you, who make paper and packaging decisions that impact consumption at scale.

LinkedIn

LinkedIn is the ideal platform for networking with entire supply chains for prominent consumer brands. In 2019 alone, we doubled our LinkedIn followers to more than 11,000+ business decision makers and customers.



Our **Sales Channel Toolkit** is packed with sales material that bring the national campaign messages to the sales channel in a digestible, easy-to-access format using data and storytelling. These sales enablement tools support important conversations with key supply chain partners and customers.

To request access to the toolkit, go to paperandpackaging.org/toolkit-request

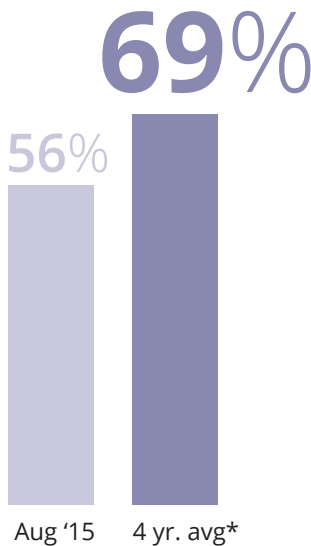
Five Years After Launch, Numbers Show Success.

Nine waves of consumer tracking since 2015 show how the campaign has effectively bolstered weaker attitudes while anchoring already strong attitudes. In fact, perceptions keep trending positive about the continued value of paper at home, school and work and the preference for brands that package their products in paper packaging.

ATTITUDES TOWARD PAPER PACKAGING GROW STRONGER



I prefer **paper-based product packaging** to packaging made from plastic



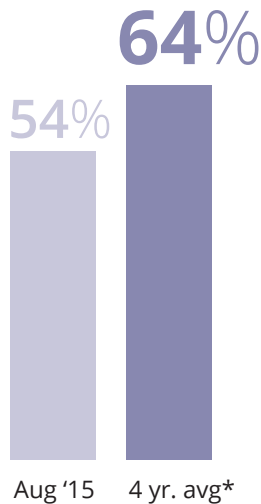
81% AGREE

4 yr. avg*

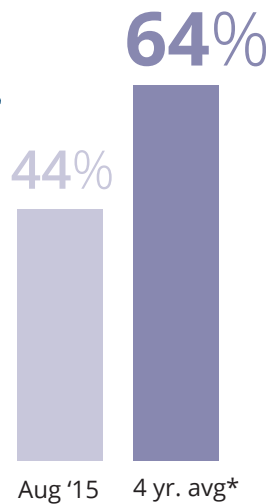
I can rely on corrugated cardboard boxes to get my **merchandise shipped safely**



Products that come in paper-based product packaging **feel more premium**



I think **more highly of companies** that package their products in paper-based packaging



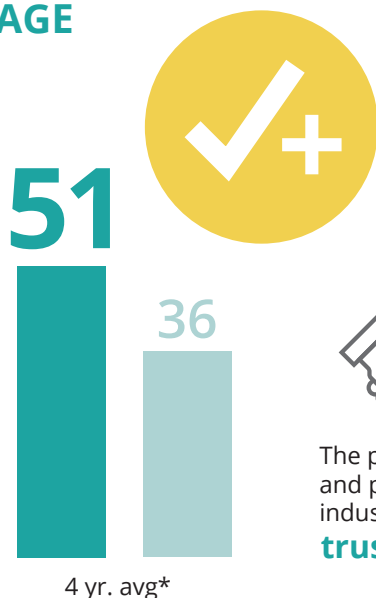
*4 yr. average reflects average of scores across all 9 waves of research conducted.

INDUSTRY IMAGE IS BRIGHTER THAN EVER

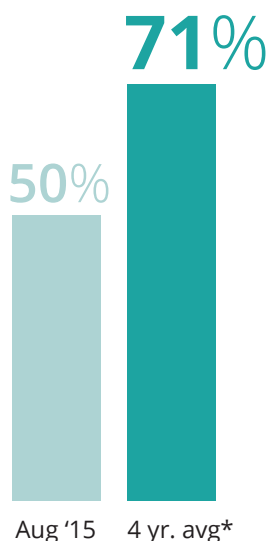
PAPER vs PLASTIC

Feelings about the paper and packaging industry **continue to be more positive** than for plastics

- Paper
- Plastics



The paper and packaging industry is **trustworthy**



74% AGREE

4 yr. avg*

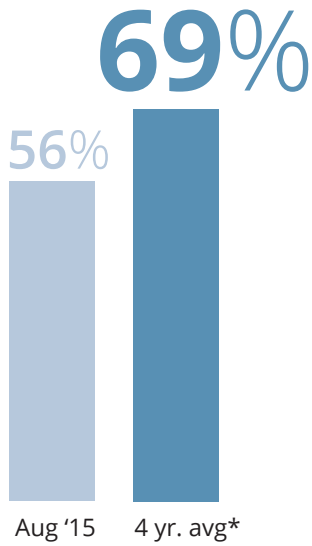
The paper and packaging industry make **innovative products**

BASED ON A 100-POINT SCALE

PAPER REMAINS HIGHLY VALUED



I enjoy receiving **direct mail**; I find it is a good source of information/ideas



**74%
AGREE**

Seeing words on paper helps me **remember what I read**

4 yr. avg*



**79%
AGREE**

4 yr. avg*

Even as tech. becomes more advanced, **paper continues to play an important role**



**67%
AGREE**

4 yr. avg*

For meetings, I prefer to distribute **printed agendas and documents**



**67%
AGREE**

4 yr. avg*

Printed catalogs **inspire me with more ideas** than browsing an e-commerce site

RECYCLING IS WORTHWHILE

Paper and paper-based packaging fans love the environment. As a proudly sustainable industry, we plan to continue communicating about our responsible practices and innovative products to reassure consumers and supply chain decision makers that paper is the earth-friendly choice.



**80%
AGREE**

Oct '19

I feel recycling **paper-based products of any kind** is still worthwhile



65%

48%

Because they are made from trees (a renewable resource) **paper/pkg products are an environmentally smart choice**

Aug '15

4 yr. avg*

Numbers Reflect Scale and Engagement with our Campaign

In the introductory years of the Paper & Packaging – How Life Unfolds® campaign, we prioritized building awareness of the value of paper and packaging products. This past year, we continued to grow awareness and added stronger calls to action to drive direct engagement with our brand and messages.

THE PATH FROM AWARENESS TO ENGAGEMENT TO ACTION

45%
SHARE OF VOICE

AWARENESS

In 2019 we generated 45% of all positive news stories and social media conversations about paper and packaging (up from 30% in 2018)



104,409,953
VIDEO VIEWS

ENGAGEMENT

The campaign garnered more than 104,409,446 video views with just over 50M individuals (or 50%) watching the full video



3,072,788
VISITS

ENGAGEMENT / ACTION

Record high 3,072,788 visits to howlifeunfolds.com



70,181
DOWNLOADS

ACTION

Strong calls to action resulted in 70,181 downloads of printable templates that promote productivity, creativity and organization



Data is from calendar year 2019

2020 Focus

Looking ahead to 2020, the headwinds from macro-trends including the rapid growth in e-commerce, the increasing reliance on technology and resulting digital displacement, the rise in consumer concern related to the environment, and, finally, the emergence of a previously unexplored generational cohort known as Generation Z (age 18-22) now entering the 18-49 population all continue to shape our approach. The campaign will skillfully keep navigating these trends while delivering positive results consistent with the success of our mission and our industry.

The Paper and Packaging Board was formed to create a unified national campaign to slow the decline in paper consumption and increase the use of paper-based packaging. Its impact is measured in many ways including how many people are seeing and interacting with campaign stories, ads and videos; how they feel about our industry and the products we make; and their likelihood to purchase industry goods of all kinds.