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.
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 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

New research shows consumer audience has grown

Supply chain decision makers are a key campaign audience

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.

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!

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

<table>
<thead>
<tr>
<th>Perception</th>
<th>Aug '15</th>
<th>4 yr. avg*</th>
</tr>
</thead>
<tbody>
<tr>
<td>I prefer paper-based product packaging  to packaging made from plastic</td>
<td>56%</td>
<td>69%</td>
</tr>
<tr>
<td>Products that come in paper-based product packaging feel more premium</td>
<td>54%</td>
<td>64%</td>
</tr>
<tr>
<td>I think more highly of companies that package their products in paper-based packaging</td>
<td>44%</td>
<td>64%</td>
</tr>
</tbody>
</table>

*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.

<table>
<thead>
<tr>
<th>Industry</th>
<th>4 yr. avg*</th>
<th>Aug '15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paper</td>
<td>51</td>
<td>50%</td>
</tr>
<tr>
<td>Plastics</td>
<td>36</td>
<td>50%</td>
</tr>
</tbody>
</table>

**The paper and packaging industry is trustworthy**

<table>
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<tr>
<th>Industry</th>
<th>4 yr. avg*</th>
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</thead>
<tbody>
<tr>
<td>Paper</td>
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The paper and packaging industry make innovative products.
Even as tech. becomes more advanced, paper continues to play an important role.

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

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

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.
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.

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.

2020 Focus

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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.