Together, we make Paper, Packaging and Progress.

2020 STATE OF THE CAMPAIGN
Together, we are rooted in the same natural resource, essential products, and mission to increase consumption of paper and packaging.
In March 2014, the Paper and Packaging Board sat for its first meeting. I’ve been here from the start, shaping this program and making it a top priority for my company and industry. I can tell you considerable progress has been made.

If you compare where we were as an industry almost seven years ago with where we are today, you realize a lot has changed. We have built a world-class marketing campaign and organization that rival some of the most well-known checkoff campaigns like eggs and cotton. Our work is steeped in robust consumer research and driven by data resulting in measurement that goes far beyond what the program spend might warrant. All of this delivers smart, focused messages, targeted to reach those who use and love our products. I am proud of how we have strengthened soft attitudes about our products, prevented erosion in those attitudes that were already strong and maintained the highest favorability scores over other competing material. Together, we’re telling a story at a scale that unites us, elevates us – and differentiates us.

When our board met this year in early February and again in June, paper and packaging company CEOs asked us to put more emphasis on communicating our industry’s commitment to resource stewardship moving forward. Turning once again to research, we have methodically begun planning a new strategy to convey this story effectively and are discussing how to best align our sustainability messaging with like-minded organizations with similar sustainability missions. This is our greatest opportunity yet. And our experienced, dedicated team is up to the challenge.

This 2020 State of the Campaign report, video and webinars from president Mary Anne Hansan speak to our industry wins. Early in the Fall, we will fully update the industry on campaign plans to look forward to following a successful referendum, scheduled October 12-23, 2020.

Please take a moment to consider the shared gains made by our 46 checkoff companies. And look for the 2021 strategy plan reveal in early September when we demonstrate how, together, we will continue to make paper, packaging and progress!

Regards,

MICHAEL P. DOSS
President and CEO, Graphic Packaging International, LLC
Chair, Paper and Packaging Board
Strategy
Stories
Scale
Success

It all comes together.
REACHING OUR AUDIENCE

We focus on a highly targeted group of prime consumers and business decision makers.

Careful segmentation has identified two key campaign audiences: the enthusiastic consumers we call Expressives and business decision makers whose paper and packaging decisions represent purchases at scale. Our media buy reaches these audiences through a wide range of channels: television, print, digital, social and public relations. Stories about packaging, productivity, learning and sustainability generate vigorous engagement and action from both consumers and customers.

OUR CONSUMER AUDIENCE GREW FROM 38M TO 50M...

18-49 year olds (% EXPRESSIVES)
Isobar, October 2019
ON LINKEDIN, WE REACH SUPPLY CHAIN CUSTOMERS.

From consumer packaged goods brands to important downstream customers, key decision makers are responding to and engaging with our LinkedIn content and data-driven social posts. Quality engagement is demonstrated by well-above-average video completions and click-through rates, magnifying the industry’s presence and voice.

SALES CHANNEL TOOLKIT

Our new sales channel toolkit provides data and third-party credibility and support to your brand story.

650 salespeople have requested access FOR 3,500+ views, shares and downloads
Together, we’ve built a thriving brand ecosystem for consumer and customer journeys.
We’ve created a dynamic loop of content, engagement and action.

Targeted media channels. Defined messaging pillars around protection and innovation, business and personal productivity, learning and resource stewardship. Compelling video content and storytelling. Strong calls to our howlifeunfolds.com website to learn more and download make our site a prolific information hub – driving preference and purchase intent for paper and packaging.
Productivity and learning. The right message at the right time.

Never has our productivity story been more relevant than when people began working and learning from home during a national quarantine. While our industry responded to record packaging demand, our campaign also responded nimbly with content about essential goods being delivered to their homes, time management, family activities and digital detox. Engagement soared to record highs.

Q1 2020 ENGAGEMENT

<table>
<thead>
<tr>
<th></th>
<th>WEB VISITS</th>
<th>DOWNLOADS</th>
<th>VIDEO VIEWS</th>
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<tbody>
<tr>
<td>January</td>
<td>214,441</td>
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<td>February</td>
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<td>March</td>
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<td><strong>15,129,666</strong></td>
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Packaging TV Ad

Website Article

Social Posts
Let’s talk packaging.


ERNEST PACKAGING

The magic of innovative packaging design for an orthodontic brand elevates the experience for customers with high impact.

See the full Ernest Packaging success story here.
HANDBSOME BROOK FARM
A valuable case study across multiple B2B channels spotlights innovative hybrid paper packaging designed to better brand and protect the precious cargo in a sustainable solution.

#POWEREDBYPAPER
Animated digital banners pique B2B customer interest with messages of branding, innovative design and protection, and drive customers to online content.
Together, we tell sustainability stories for a healthy planet and responsible industry.
CAMPAIGN ECOSYSTEM

Sustainability comes to life across all channels.

Our sustainability and forest renewal messaging plays out seamlessly in our established campaign ecosystem. Consumers and business decision makers interact with stories that demonstrate our environmental commitment, dispel myths and reinforce facts that change minds. Our expanded efforts amplify these messages at a time when environmental concerns are commanding headlines and worry lines.

SUSTAINABLE FOREST ARTICLES

Fostering healthy forests is as good for ecosystems, communities and economies as it is for the future of our industry. Healthy wildlife habitats, clean water, biodiversity, and the capacity to regrow and regenerate all resonate with our audiences across every media channel.
**FACES OF THE FOREST VIDEOS**

With over 8 million video views and counting, *Faces of the Forest* proved to be the most successful content of our sustainability campaign. Six short films set in wood-baskets across the nation bring to life the legacy of family tree farmers and their commitment to stewardship, forest management and habitat preservation.

**Our Sustainability Story Changes Minds**

Showing *Faces of the Forest* videos directly to a small number of consumers yielded feedback that demonstrated reduced feelings of guilt and positive feelings around our industry’s resource stewardship.

“**Yes, definitely less guilty since it was so sincere based on the character telling the story and showing the passion she had for the trees.**”

“**They described tree farmers as “stewards” of the land, which is a big, warm statement given that stewards are caretakers and leaders in their role.**”

“**...that they will not allow the forest to be turned into strip malls and that the forests are thriving and very lush and healthy.**”

“I think the most compelling statement was that a well-managed forest is actually better at storing carbon than an unmanaged forest...”
CAMPAIGN ECOSYSTEM

Resource stewardship resonates with both consumer and business audiences.

Using pertinent facts and leveraging respected national publications, television programming, and popular social platforms, our industry’s positive environmental story was elevated to primary messaging to enable the campaign to respond to increased consumer guilt and worry.

#ASKPAPER

Interviews with experts from our checkoff companies, quizzes, organic and paid social about paper’s sustainability: this initiative thrives in the B2B space, including LinkedIn.
CUSTOM MAGAZINE CONTENT
Thought leadership around paper and paper-based packaging has great presence in leading consumer and B2B publications.

PAID ADVERTISING
National print and television featuring Casey and Page offer a broad reach and humanize our products and benefits in a memorable way for consumers and customers.

TOP SOCIAL CONTENT
Faces of the Forest and #treeselfies star on social media and drive consumers and business decision makers to our site for more information around our industry sustainability story.
Together, we’re making lasting impact.

Six years into our campaign, the cumulative effect and power of together are paying off. Our research-based campaign creates a unified voice for paper and packaging. Record-high followers and engagement and a commanding scale of voice build a thriving ecosystem that unifies member companies large and small, and elevates them individually and as an industry.

AWARENESS > ENGAGEMENT > ACTION > STRONGER PURCHASE INTENT

2019 RESULTS

45% SHARE OF VOICE

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

104,409,953 VIDEO VIEWS

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

3,072,788 WEB VISITS

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

70,181 DOWNLOADS

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

PURCHASE INTENT

71% of BDMs and 69% of Expressives said they'd be more likely to purchase after reading content on howlifeunfolds.com
WE’VE STRENGTHENED PERCEPTIONS ABOUT OUR MATERIAL, OUR PRODUCTS AND OUR INDUSTRY REPUTATION.

79% AGREE
4 yr. avg*
Even as tech. becomes more advanced, paper continues to play an important role

74% AGREE
4 yr. avg*
The paper and packaging industry makes innovative products

81% AGREE
4 yr. avg*
I can rely on corrugated cardboard boxes to get my merchandise shipped safely

69%
56%
Aug ‘15 4 yr. avg*
I enjoy receiving direct mail; I find it is a good source of information/ideas

64%
54%
Aug ‘15 4 yr. avg*
Products that come in paper-based product packaging feel more premium

64%
44%
Aug ‘15 4 yr. avg*
I think more highly of companies that package their products in paper-based packaging

Isobar, October 2019 Attitude and Usage Tracking. Data reported on Expressives aware of the campaign.

AT 12:1, OUR ROI IS NOT ONLY A VALUE. IT’S IMPRESSIVE.
Our industry sustainability has never been more critical. Or more convincing.

The national conversation around the environment, climate change and health is escalating. While consumers rely on our essential products at home and work — and are committed recyclers — they wrestle with guilt about waste and are looking to industries and government to do more.

Increasingly, consumers feel large companies and governments bear the most responsibility for making our world more sustainable.

64% feel more environmentally conscious

62% Companies

57% Governments

Isobar, October 2019

Learning the truth changes minds and attitudes.

Even now, we are in the midst of new research to understand our industry’s environmental passion and commitment. The results are helping us pinpoint consumer misconceptions, discover how to deliver the right information to change views and improve feelings of guilt. Here is an example of our findings regarding the size of our forests:

All believe the forests are “definitely diminishing”. Most indicated they would be very surprised and happy if they heard that the forests were growing.

“I would be very pleasantly surprised if this were the case. It would make me glad to know that we are doing something right to preserve nature.”

When informed that forests were growing, virtually all were surprised and impressed.

“If sustainable forests are increasing across the United States — it makes me happy to know that we are not using up valuable resources and impacting nature as much as I thought.”

Sustainability 2019, The Hartman Group, Inc.
Our products are essential to how people live, work and care for our planet.

That story is our industry’s shared future.
With research and readiness, we are propelling our industry forward.

Watch to see how, together, we are making paper, packaging and progress.
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.