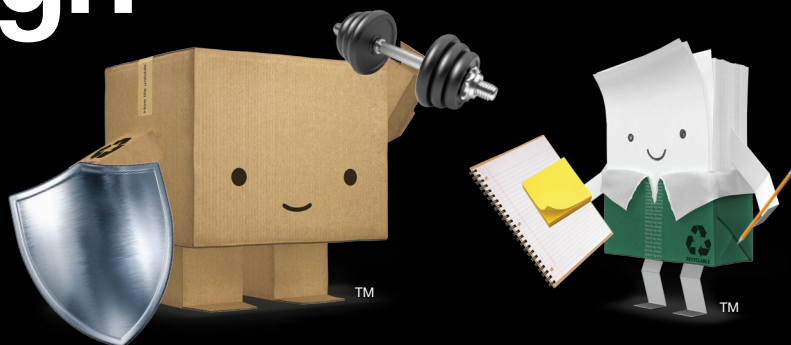


2018 Campaign Impact Report



Paper & Packaging – How Life Unfolds® campaign has been hard at work! In 2018 animated corrugated and paper brand ambassadors, Casey and Page, were introduced. They help tell the story about the benefits of paper and paper-based packaging in new social media, print, TV and digital advertising. Videos featuring the characters and other paper and packaging stories gained significant traction. In 2018, we ran 19 campaigns with video content receiving more than 125 million views across digital and social platforms.

The October 2018 tracking survey conducted for the Paper and Packaging Board shows that, among consumers aware of the campaign, preference for paper and paper-based packaging is strong. Though negative environmental news stories may add to consumer uncertainty, our data shows the campaign is helping to reduce those concerns. The messaging is breaking through and consumers say they feel positive toward and are more likely to use paper and packaging products after seeing the advertising.



Consumers Say They Value Paper Even as Technology Use Grows

According to market research firm eMarketer, consumers spent more than 12 hours a day with media of all kinds in 2018, with more than half spent on digital devices (desktop and phones).¹ Despite consumers' heavy use of digital, our data shows they continue to have a strong preference for paper.

80% 
AGREE

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

74% 
AGREE

Storing/keeping information on paper is still a valuable thing to do.

Better Learning is Strongly Associated with Paper

72%
AGREE

Seeing the words on the page helps me remember what I read.

77%
AGREE

I concentrate better when I read a printed book.

76%
AGREE

Taking notes by hand helps me retain information better.

A Strong U.S. Economy Fuels Demand for Shipping Boxes

The Federal Reserve estimates that U.S. manufacturing output rose 2.5% in 2018.² And according to eMarketer, U.S. e-commerce sales rose about 16% last year.³ As consumers rely more on corrugated boxes, they continue to feel positive about the benefits and even love to find ways to reuse them.



80%
AGREE

They **rely on corrugated cardboard boxes to get merchandise shipped/delivered safely**, a number that has stayed high since the start of the campaign.

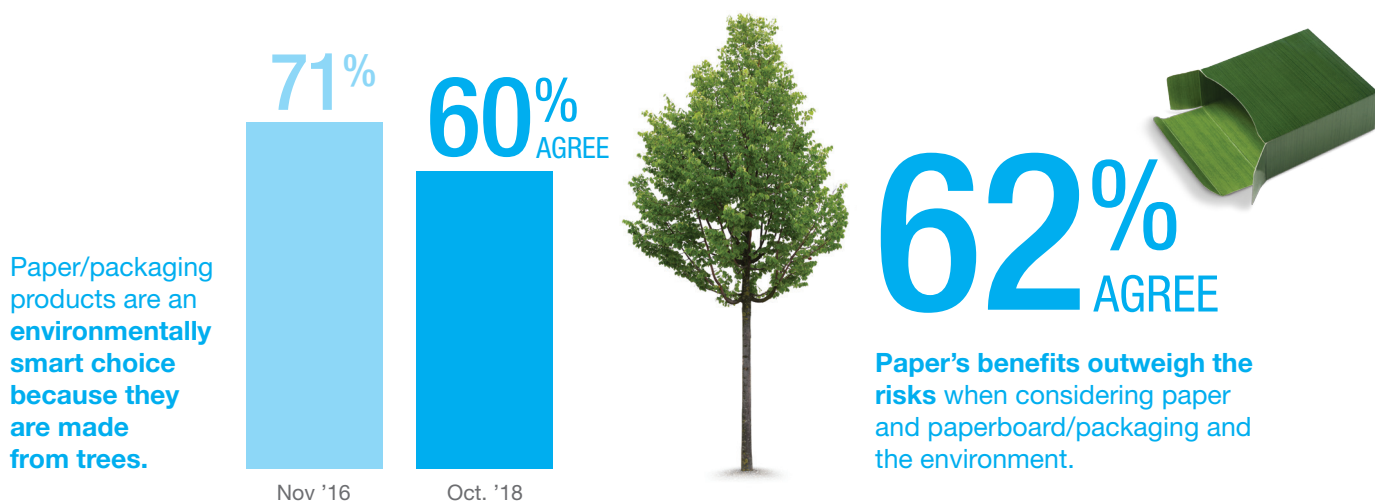
67%
AGREE

I love to find ways to reuse corrugated cardboard boxes.



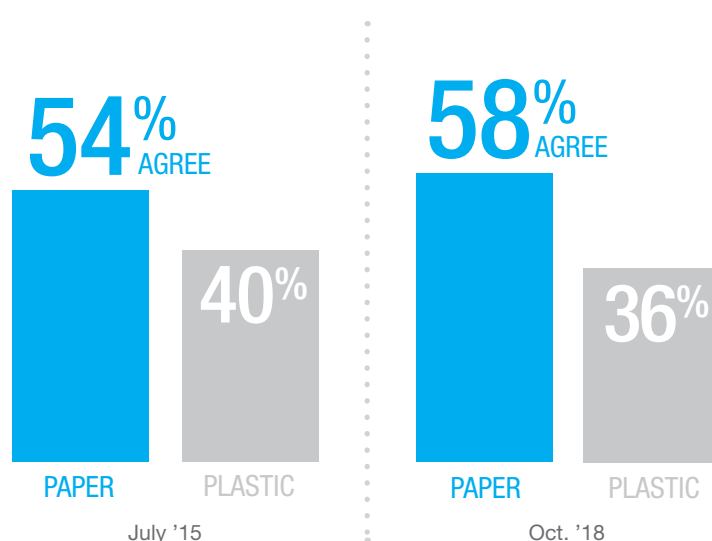
Even with Increased Media Attention About Waste, Consumers Feel Paper's Benefits are Worthwhile

News around waste and recycling, along with a steady drumbeat of stories about global warming and extreme weather in 2018, softened consumers' feelings about paper and its environmental impact. Despite their concern, consumers still feel strongly that paper's benefits outweigh the risks, especially when compared to other industries.



PAPER vs PLASTIC

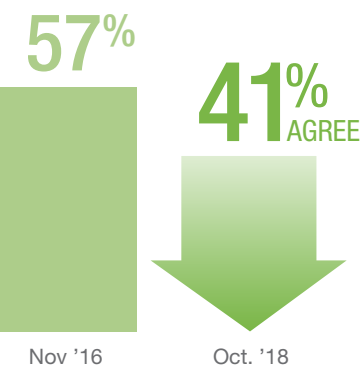
The paper and packaging industry continues to be viewed more favorably than other industries.



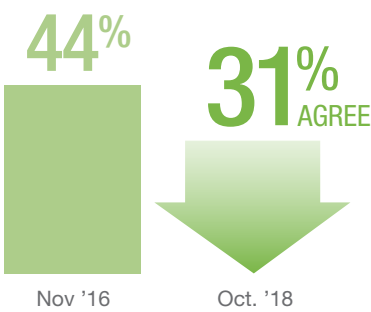


Environmental and Benefits Messages Help Reduce Consumers' Worry

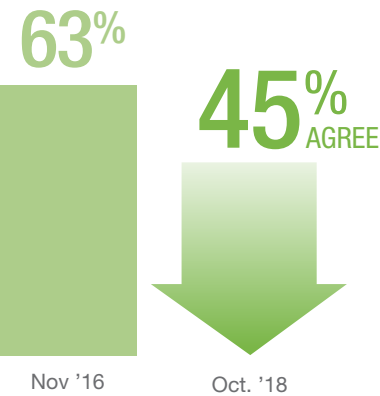
The survey showed a decline in negative feelings about paper-based products suggesting our industry's efforts, in tandem with the consumer campaign, are beginning to reduce feelings of concern. Reducing the public's concern about waste is as important as reinforcing paper's benefits.



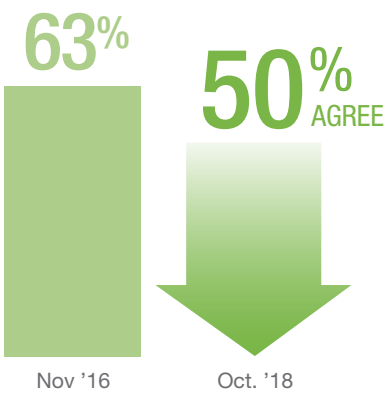
Corrugated cardboard boxes **create waste and clutter in my life.**



I find it too time consuming to **break down corrugated boxes for recycling.**



Paper documents only **create waste and clutter in my life.**



Printing out documents makes me **feel guilty about the environment.**

83% AGREE
Recycling paper of all kinds is still worthwhile.



New Campaign Messages Increase Desire to Purchase

After one year, new advertising featuring our brand ambassadors is working. Consumers' interest in a range of paper products increased after seeing the advertising.



Likelihood to **print documents, presentations and reports** to read, edit, store, etc.



Likelihood to **purchase products packaged in paper-based packaging** vs. plastic packaging.



Likelihood to **request paper bags over plastic bags** when offered a choice while shopping at a grocery or retail store.



Consumer Tracking Survey. Isobar, October 2018. © Paper and Packaging Board.
Survey Audience: Expressives are consumers, both male and female 18-49, who share similar psychographic traits predictive of their use of paper and their interest in the environment.
¹"Average Time Spent with Media." EMarketer, Sept. 2018, www.emarketer.com.
² Federal Reserve System, 2018, www.federalreserve.gov.
³"Retail Ecommerce Sales." EMarketer, Oct. 2018, www.emarketer.com.