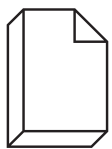


Together, we make  
Paper, Packaging  
and Progress. ➡

2020 STATE OF THE CAMPAIGN




**Paper &  
Packaging**

How life unfolds.







Together, we are  
rooted in the same  
natural resource,  
essential products,  
and mission to  
increase consumption  
of paper and  
packaging.

## LETTER FROM OUR BOARD CHAIR



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,

A handwritten signature in black ink that reads "Michael P. Dooss". The signature is fluid and cursive.

**MICHAEL P. DOOSS**  
President and CEO, Graphic Packaging International, LLC  
Chair, Paper and Packaging Board

Strategy  
Stories  
Scale  
Success

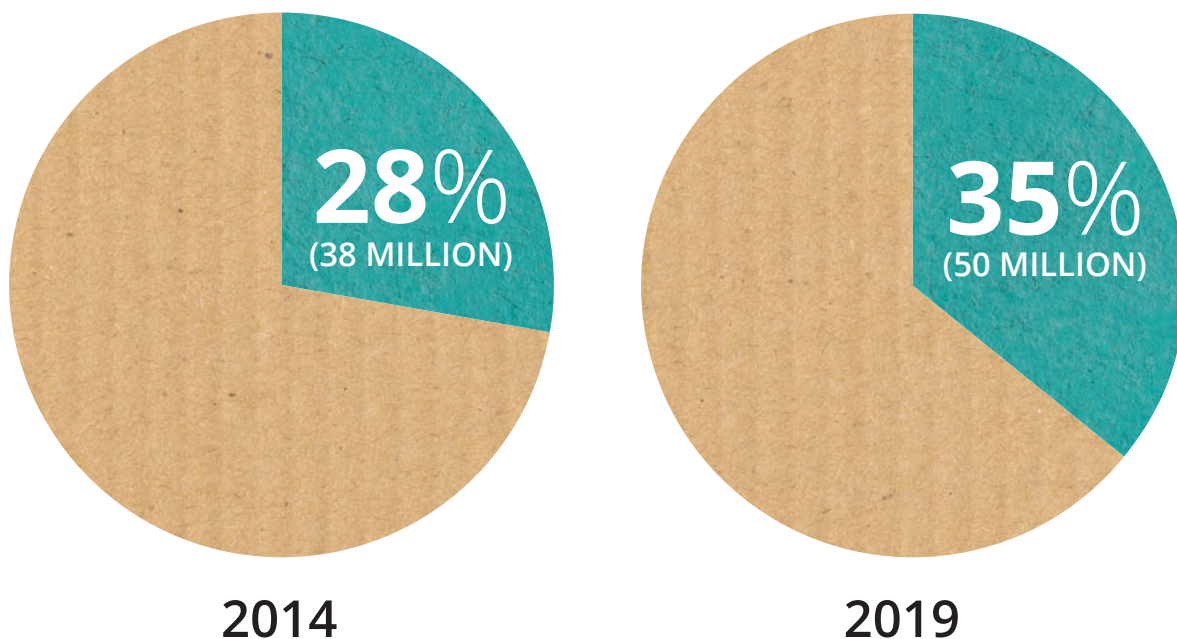
It all comes together.



# 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.

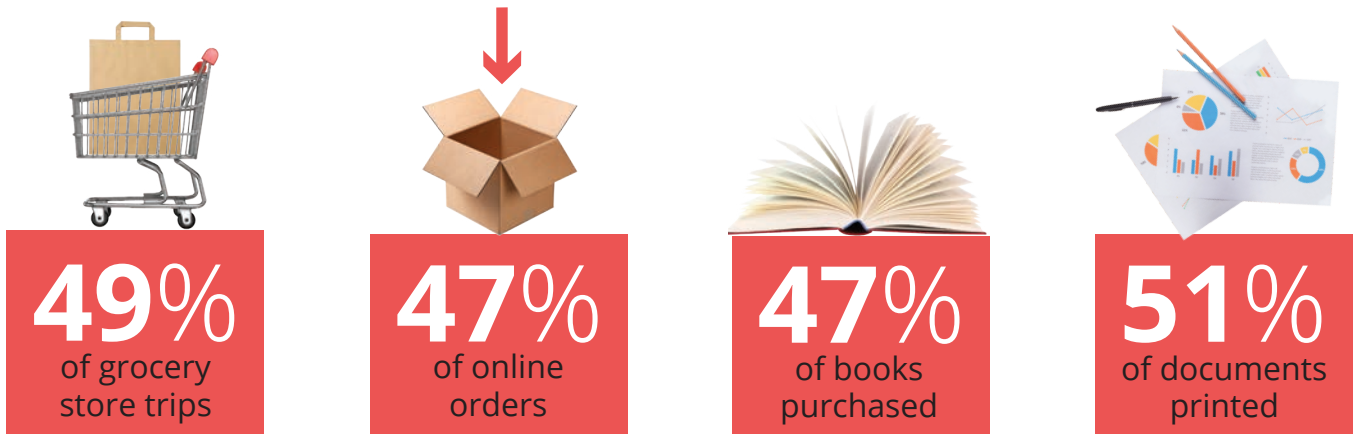
## OUR CONSUMER AUDIENCE GREW FROM 38M TO 50M...



18-49 year olds (% EXPRESSIVES)

Isobar, October 2019

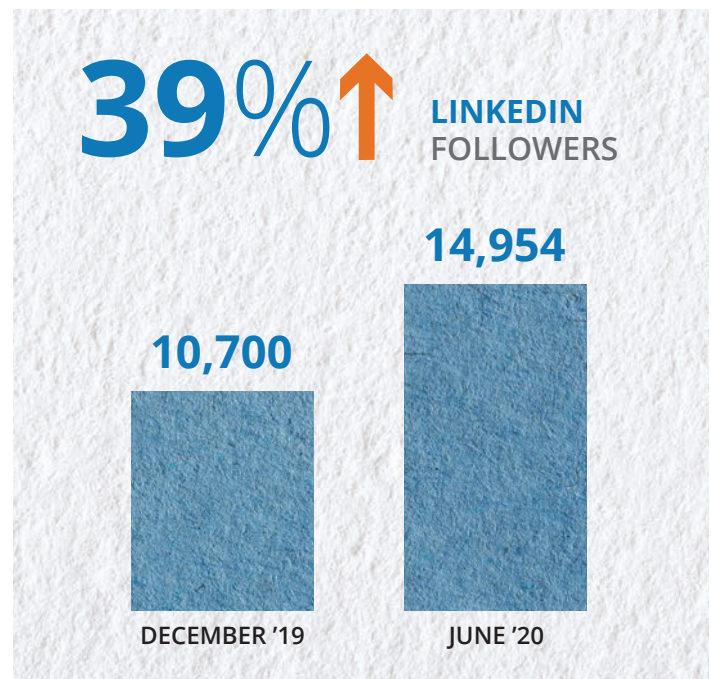
...AND THEIR SPENDING POWER GREW, TOO.



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.





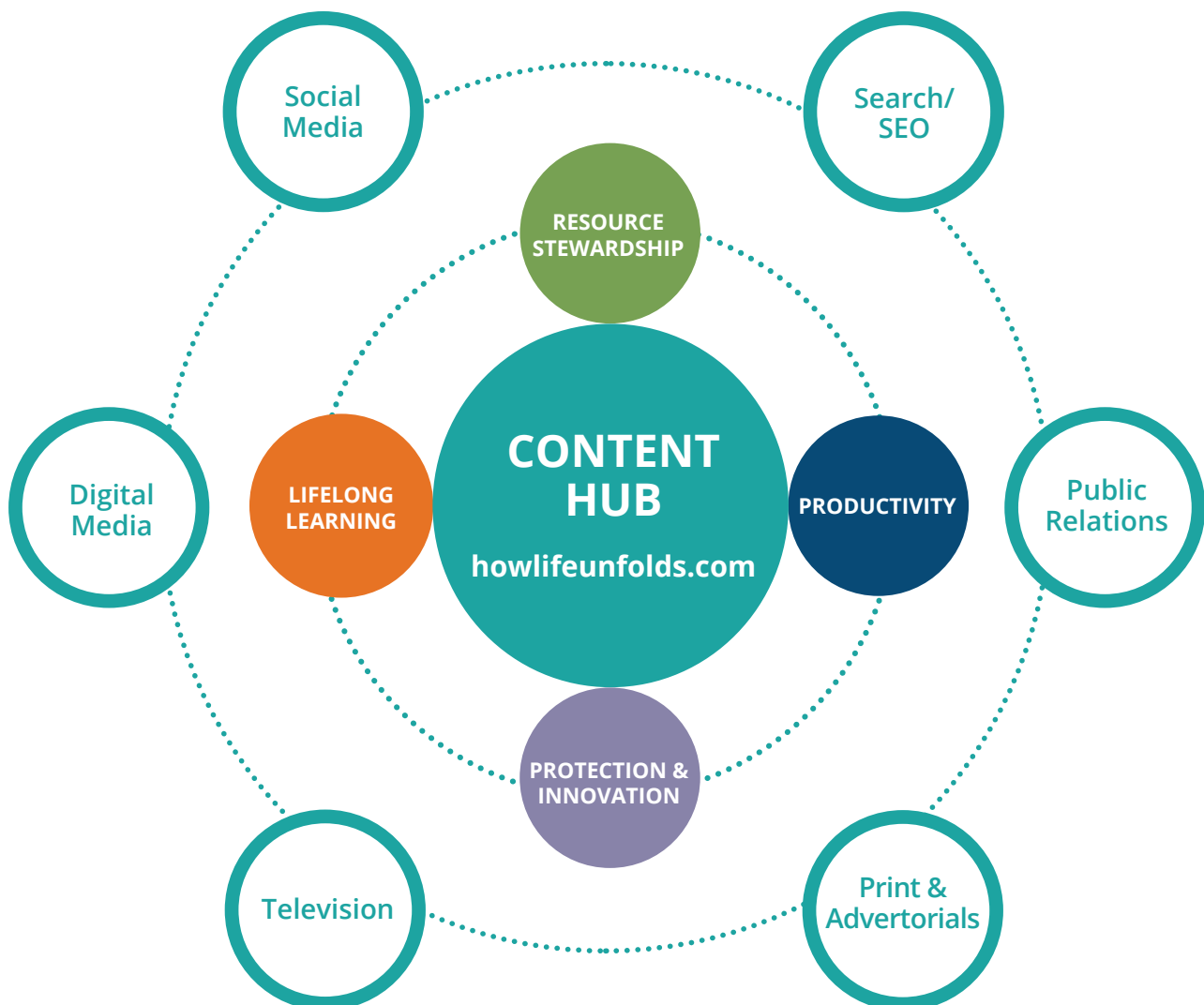
WHOLE WHEAT  
**FLOUR**

ORGANIC

5 Kg NET

# 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](http://howlifeunfolds.com) website to learn more and download make our site a prolific information hub – driving preference and purchase intent for paper and packaging.

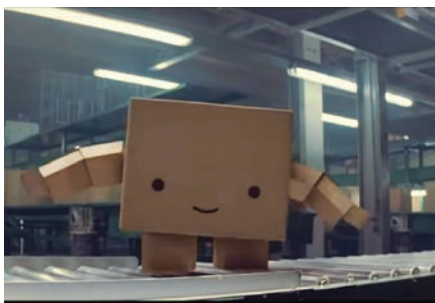
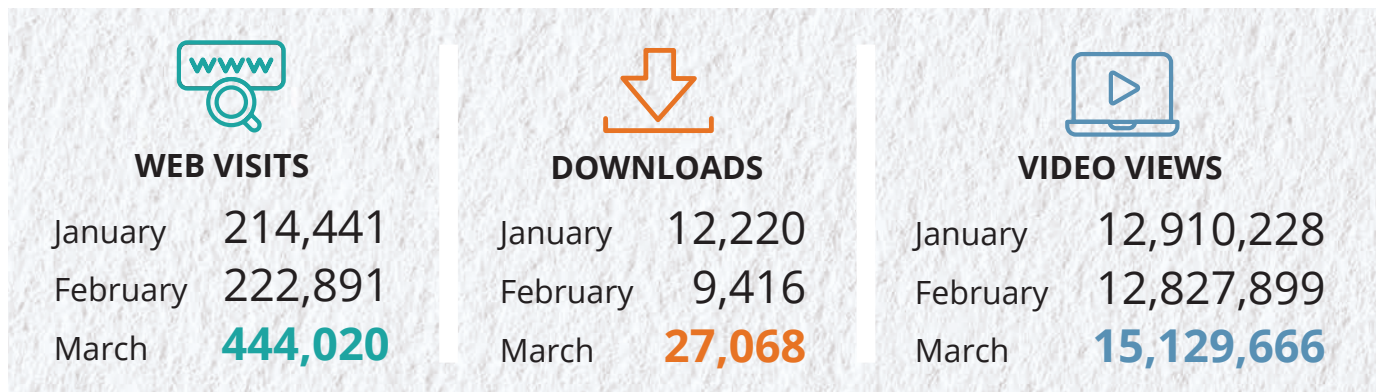




# Productivity and learning. The right message at the right time.

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.

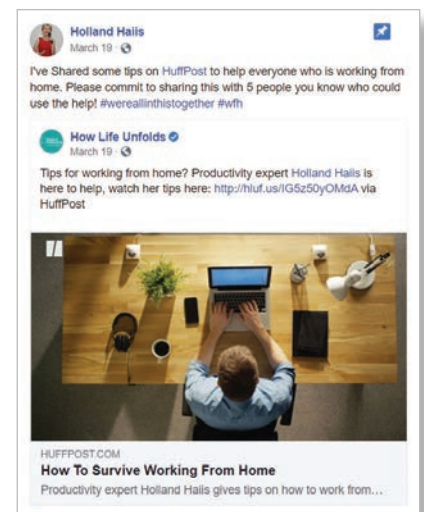
## Q1 2020 ENGAGEMENT



Packaging TV Ad



Website Article



Social Posts



## CAMPAIGN ECOSYSTEM

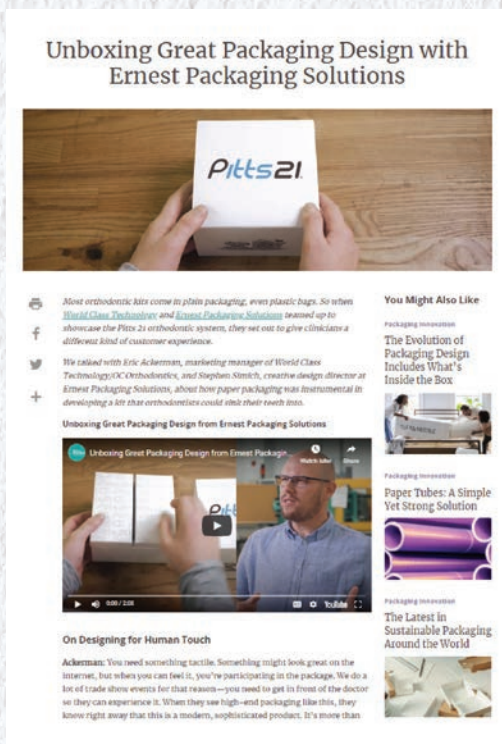
# Let's talk packaging.

Protection. Innovation. Supply chain optimization. Sustainability. Branding. Consumer preference. Our packaging stories drive decision makers to act by clicking through to learn more on [howlifeunfolds.com](http://howlifeunfolds.com). By design, every intersection of the experience within our ecosystem is relevant, compelling and actionable.

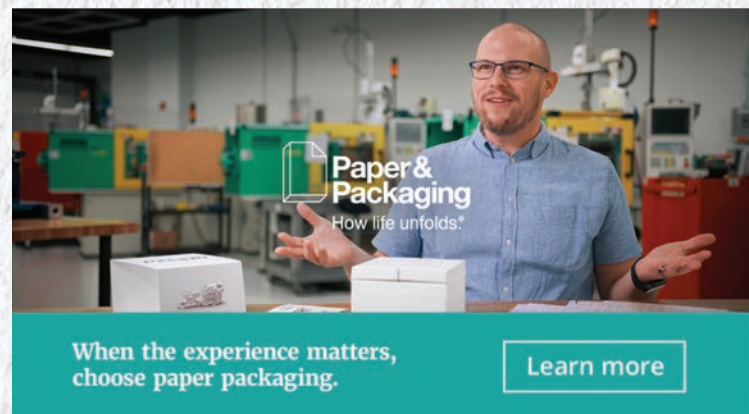


## ERNEST PACKAGING

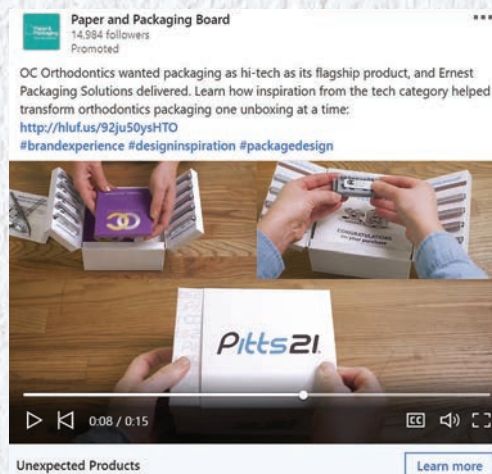
The magic of innovative packaging design for an orthodontic brand elevates the experience for customers with high impact.



Website Article



Digital Banner Ad



LinkedIn Post



See the full Ernest Packaging success story here.



## HANDSOME BROOK FARM

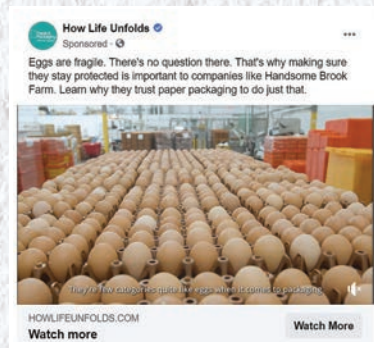
A valuable case study across multiple B2B channels spotlights innovative hybrid paper packaging designed to better brand and protect the precious cargo in a sustainable solution.



Video



Printable Case Study Sales Asset



LinkedIn Post



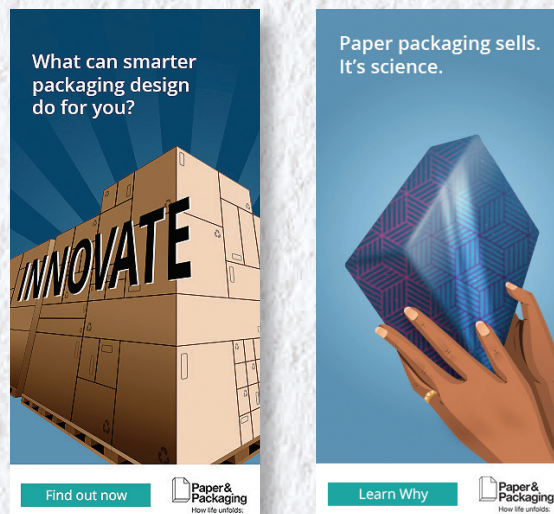
See the full Handsome Brook Farm Egg Packaging success story here.

## #POWEREDBYPAPER

Animated digital banners pique B2B customer interest with messages of branding, innovative design and protection, and drive customers to online content.



Website Article



Digital Banner Ads



See the full #PoweredbyPaper success story here.





Together, we tell  
sustainability stories  
for a healthy planet and  
responsible industry.

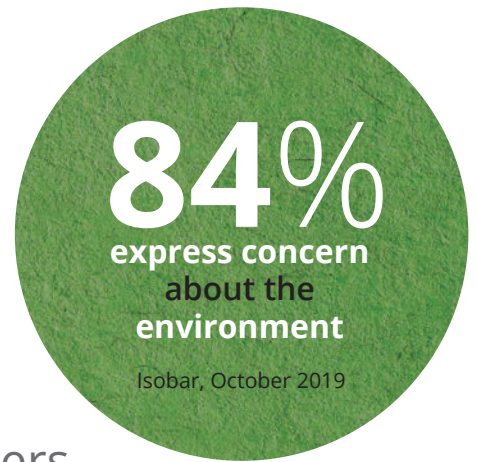






# Sustainability comes to life across all channels.

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.

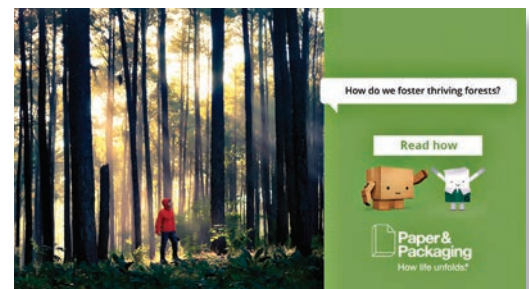


## SUSTAINABLE FOREST ARTICLES

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.



Website Article



Digital Ad Banner



Twitter Post



## 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.



Defrees Family, Oregon



Gray Family, North Carolina



Rainey Family, Arkansas



Boutwell Family, Alabama



Town of Falmouth, Maine



Sally Hightower, Michigan

## 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."*

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

*"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."*

*"I think the most compelling statement was that a well-managed forest is actually better at storing carbon than an unmanaged forest..."*



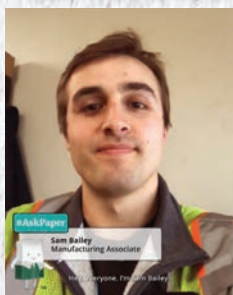
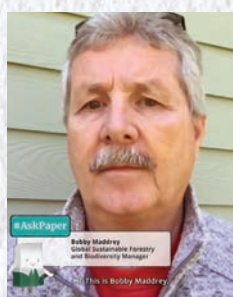
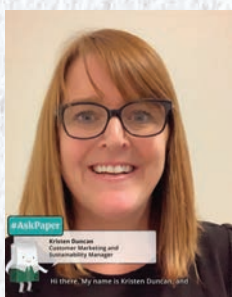
# Resource stewardship resonates with both consumer and business audiences.

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

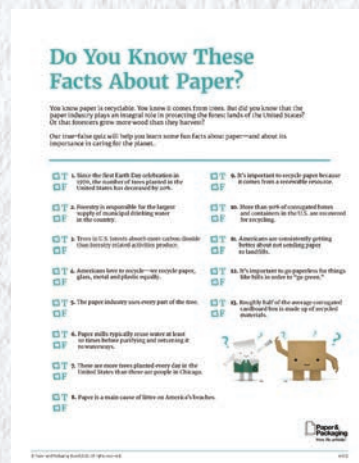
Interviews with experts from our checkoff companies, quizzes, organic and paid social about paper's sustainability: this initiative thrives in the B2B space, including LinkedIn.



Company Expert Interviews



Website Article



Quiz



Twitter Post



## CUSTOM MAGAZINE CONTENT

Thought leadership around paper and paper-based packaging has great presence in leading consumer and B2B publications.



HGTV Magazine Article



Smithsonian Advertorial



Inc. Advertorial

## 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.



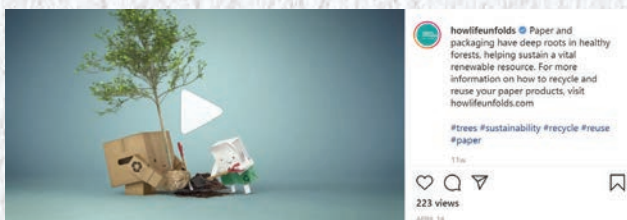
Print Ad



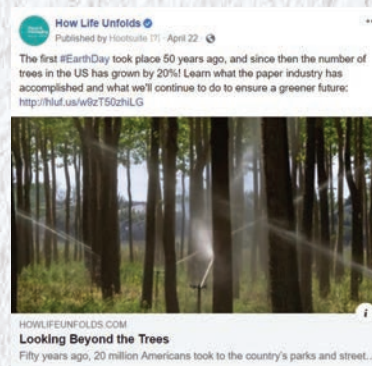
Inaugural Issue

## 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.



ARBOR DAY #TREESELFIE  
Instagram Post



BEHIND FACES  
OF THE FOREST  
Facebook Post

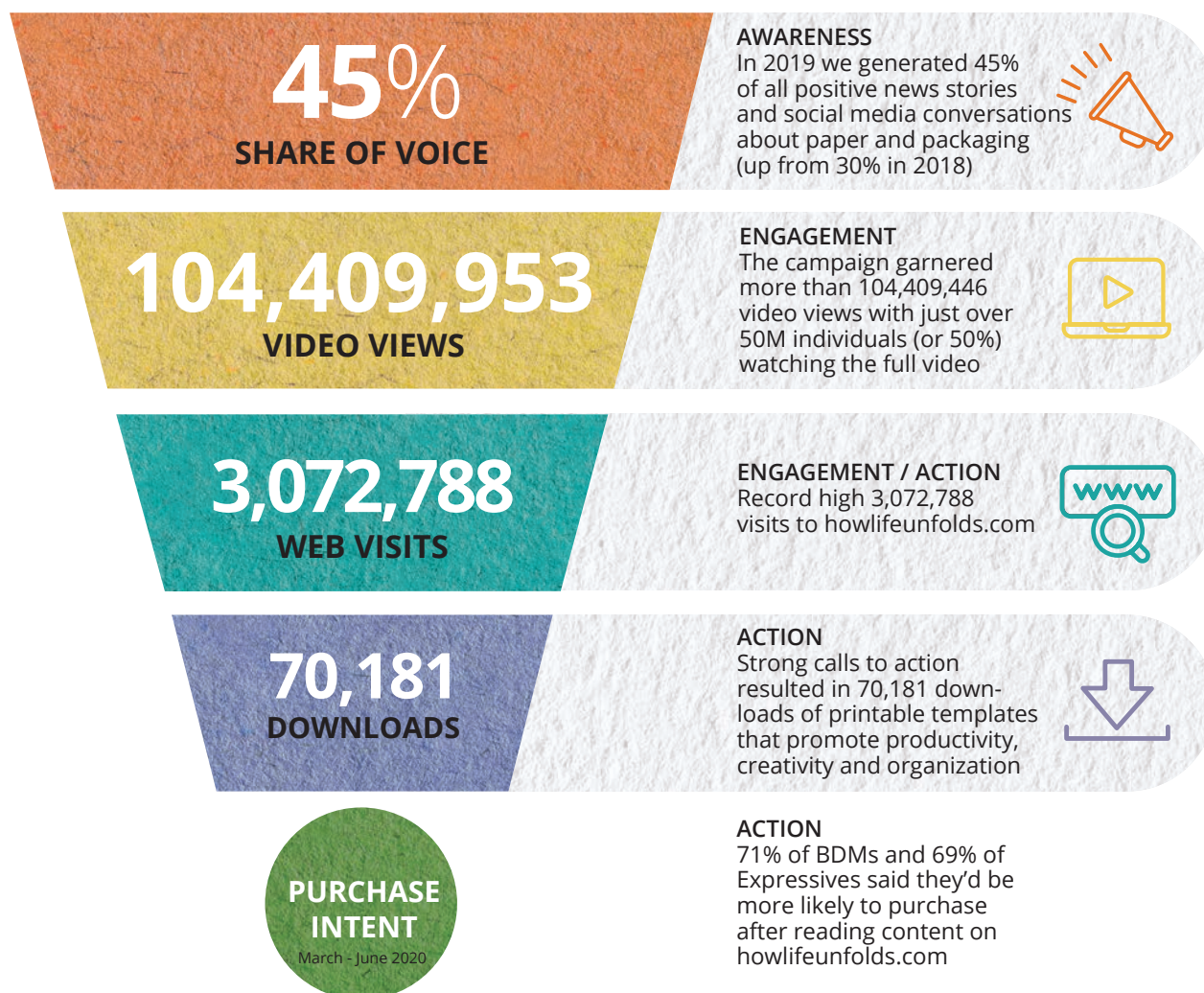


# Together, we're making lasting impact.

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





## 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**

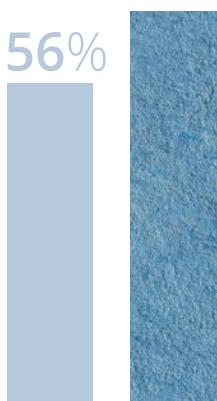
**81%**  
**AGREE**

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%

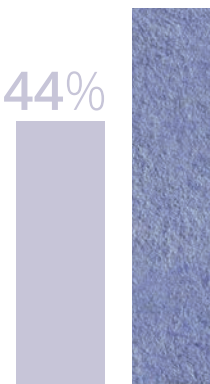


Aug '15 4 yr. avg\*

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.



**64%**  
feel more  
**environmentally  
conscious**

Isobar, October 2019

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

**62%**  
**Companies**

**57%**  
**Governments**

Sustainability 2019, The Hartman Group, Inc.

## 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."*



The background is a complex collage. It features several cardboard boxes in various stages of assembly, some open and some partially folded. There are two trowels with wooden handles and red grips, one in the upper left and one in the lower left. Large, thick arrows in teal, orange, and brown point in various directions across the frame. Interspersed among these are green, stylized evergreen tree patterns. A roll of light-colored material, possibly insulation or drywall, is visible in the lower right. The overall composition suggests a connection between construction, industry, and the environment.

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.

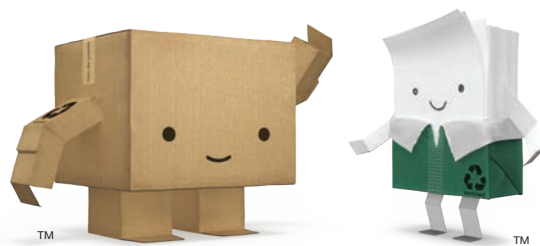


Watch to see how, together, we are  
making paper, packaging and progress.









**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.



[paperandpackaging.org](https://paperandpackaging.org)  
[howlifeunfolds.com](https://howlifeunfolds.com)

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