



**Paper &
Packaging**

How life unfolds:

2021 CAMPAIGN IMPACT REPORT

MANUFACTURERS. INNOVATORS. LEADERS.

Amid the worst global pandemic since 1917 and the increasingly louder call for more planet-friendly solutions, the paper and packaging industry has been delivering, not only through recent actions and investment but by amplifying our historic vision in sustainable practices.

Our industry is planted firmly at the forefront of partnerships with forest landowners, building recycling infrastructure and protecting natural habitats, aligned with U.N. Sustainable Development Goals long before most other industries. We pioneer solutions for consumer and customer needs that empower people to make choices that are good for both the environment and business.

Our fresh new national consumer campaign launched in July educates and inspires around planet-focused benefits like recycling, forest management, thriving habitats and innovative new products. Championing these truths elevates consumers' confidence and vital role as decision-makers who are part of the environmental solution. Making paper and packaging seen and heard, and engaging consumers in our success, continue to make a meaningful difference for our forests, environments, economy — and shared future.

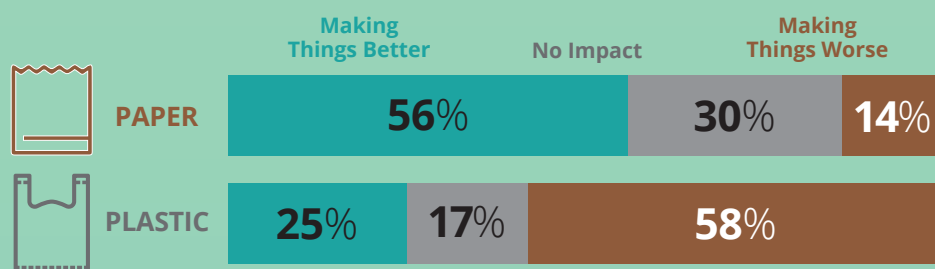


2021 CAMPAIGN IMPACT REPORT

Proud moment. Powerful momentum.

We achieve ultimate impact when what's good for business is also good for the environment. Innovative, sustainable solutions for consumer packaged goods companies not only support our industry's mission but give these important users of our material the ability to meet their own sustainability goals as well.

Paper vs. Plastic: Impact on the Environment

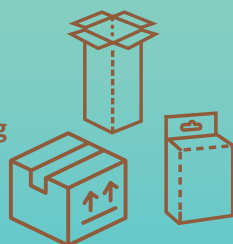


Products: Impact on the Environment



60% AGREE
Paper Products are part of
the environmental solution

64% AGREE
Paper-based packaging
is part of the
environmental
solution



Product Innovation



I agree the
industry
makes
innovative
products



Jul '15

Nov '21

A reputation of strength and trust.

Our planet-friendly innovation and recycling message consistently wins and holds the trust of consumers across all ages – a reputation with a halo effect on purchasing decisions as consumers request "Paper, please."

Please **tell us**
your feelings
about each
industry
using a scale
that ranges
from 0 to 100.

54pts



PAPER



PLASTICS

Plastics has
dropped from
41 in 2020 to
34 in 2021.

I agree the industry
is **trustworthy**



61%

Jul '15

Nov '21

76%

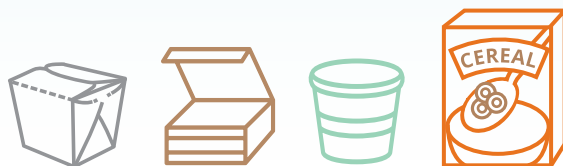


Consumers prefer paper packaging over plastic – and continue to appreciate paper.

With the ascension of ecommerce, reliance on paper-based packaging has eclipsed plastics. But COVID-19 has accelerated people's reliance on digital for information, productivity and marketing. Paper is still seen as having an important role, however, for reading and learning on paper and for important documents. A bright spot: U.S. publishers sold 825.7 million print books in 2021, up 8.9% over the previous year.

Paper-based packaging ranks at the top.

87% prefer paper-based product packaging



4 in 10 

actively avoid plastic product packaging up from 34% in 2020



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

52%

Jul '15

78%

Nov '21



Paper-based product packaging is an essential part of everyday life.

59%

Jul '15

81%

Nov '21

Paper for important life moments.

Even as technology becomes more advanced **paper continues to play an important role** in our lives



74%

Jul '15

81%

Nov '21

I concentrate better when I read a printed book



68%

Jul '15

76%

Nov '21

I prefer to receive important documents such as those related to finance, health insurance, etc. **by mail instead of electronically**



68%

Jul '15

81%

Nov '21

A cycle of care. (And consumers want to play a part!)

The recyclability of our products translates to positive feelings and strong intentions to participate. While our campaign target audience report they recycle always/most of the time, 2/3 of the general public admit they don't always recycle, so with the increase in goods coming to consumers' homes, we have work to do.



75%

always/most of the time **recycle paper based packaging**



77%

always/most of the time **recycle corrugated cardboard**



77% **AGREE**

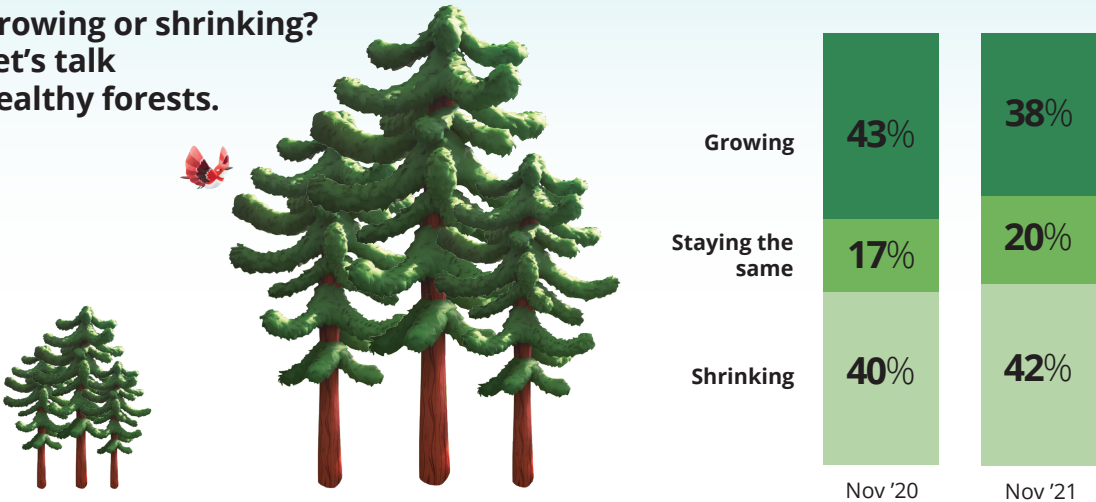
I believe that because most paper and paper-based packaging material **can be recycled, it is not waste**



Standing taller to overcome misperceptions.

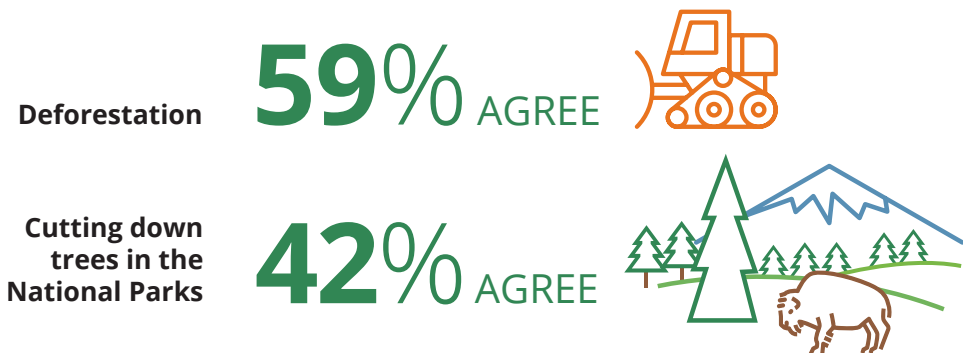
Expressives are concerned about climate change, with 62% believing that it contributes to forest fires. Across issues like climate change, and forest misperceptions, we are leaning into where we make a difference, sharing the facts and easing worries among consumers.

Growing or shrinking? Let's talk healthy forests.



Important forest management legacy myths that persist.

I believe the paper and packaging industry is engaged in:



The happy story of consumers doing their part.

Consumers agree that they can make a difference when we show them where and how.



MEASURING SUCCESS IN 2021

Our campaign is designed to influence consumer attitudes by driving a clear, positive understanding of our industry's focus on sustainability and innovation, and by growing a preference for paper and paper-based packaging. Our updated Attitudes & Usage study now tracks the impact of our new campaign, specifically, consumer attitudes around the health of the forests and the industry being part of the solution.

Our target audience remains the nation's 50 million strong Expressives, men and women ages 18 to 49 who love paper-based products and want to make the right choice for the environment. Our research and campaign are also diving deeper to understand and appeal to younger segments that are core future decision-makers. Our tracking study now differentiates Gen Z, Millennial and Gen X Expressive cohorts. Already we are unearthing generational differences we need to continue watching and shaping:

- 42% believe the industry is cutting down trees in national forests
27% of Gen X believe this
- 59% believe the industry is engaging in deforestation
69% of Gen Z believe this
- 64% believe recycling is still worthwhile
53% of Gen Z believe this

The industry's investment is working at scale.

2021 campaign KPIs focus on awareness and education at scale vs. individual engagements and clicks. Video views across digital, social and advertising platforms show that content is being seen at record high numbers. The impressive rate of completions demonstrates that the message is holding people's attention and being delivered.



VIDEO VIEWS

The new campaign videos from July through December 2021 scored a remarkable 74% completion rate.

2019

104M

2020

132M

2021

268M

A vibrant, modern campaign to reach the young and young at heart.



TikTok: fastest-growing social media platform.

Five eco-influencers plus brand ambassadors Casey and Page helped our first-ever TikToks unpack 138K clicks, 33M video views with 505K video completions. eMarketer predicts 41% of U.S. TikTok audiences will be Gen Z and 30% Millennial in 2022.



Storytelling through animation.

Pixar-like color and motion brought sustainability facts to life for an increasingly younger audience – tomorrow's decision-makers.



Holiday magic.

November – December 2021, our holiday push celebrated increased use of cards, wrapping paper and shipping boxes with video, banner ads and custom print – resulting in 655K engagements, 17M video views and a 77% video completion rate!

The right tools tell our story and drive people to learn more.

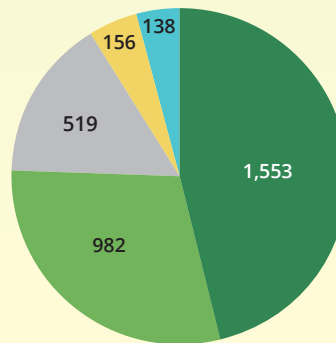


1,648,185
WEBSITE VISITS

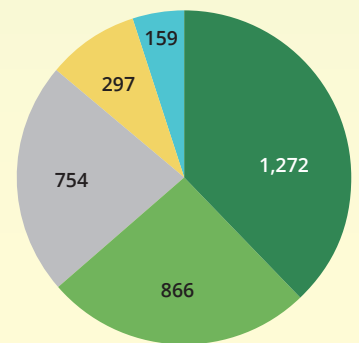
A holistic educational campaign, every ad, post and video (paid and organic) drives consumers to learn more at **HowLifeUnfolds.com** and our **PaperForNature** microsite.

Survey says: the campaign is working!

After visiting our websites, consumers are surveyed to gauge sentiment about our industry and products. The responses reflect an increase in positive feelings about choosing paper-based products and our industry's role in the health of U.S. forests.



When I choose a paper-based product, I am making a positive contribution to the environment



The makers of paper and paper-based products contribute positively to the overall health of US Forests

NUMBER OF RESPONSES

Agree Strongly Agree Neutral Disagree Disagree Strongly

The Paper and Packaging Board promotes paper products and paper-based packaging as an environmentally smart choice that helps create a healthier planet. The Paper & Packaging – How Life Unfolds® national marketing campaign focuses on the industry's unrivaled sustainability story.