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SPECIAL EDITION



STATE OF THE CAMPAIGN



Paper and Packaging Board Newsletter

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10 Years and a New Industry Narrative

- *Paper companies are now known for planting, not cutting trees.*
- *Consumers see climate change and urbanization, not paper companies, as the biggest threats to forests.*
- *Paper companies are more often associated with environmental solutions rather than environmental problems.*
- *Paper companies' stewardship goes far beyond the mantra of "reduce, reuse, recycle." Our campaign is amplifying paper companies' goals to renew, preserve and protect forests with efforts that go beyond mere tree planting.*

5 Key Takeaways from 10 Years of Paper, Packaging and Progress

By Mary Anne Hansan, President of the Paper and Packaging Board

A decade ago, the paper and packaging industry concluded definitively that without a unified national voice to set the narrative, others—notably our competitors—would do it for us, skewing how our industry and its products are perceived. That led to the formation of the Paper and Packaging Board, a national consumer-education and marketing campaign funded by the industry and aimed at increasing preference for our products.

We've spent the years since laying the foundation for paper companies to be seen as climate ambassadors, dedicated to both forest growth and forest preservation. This progress didn't happen by accident and our work is not done. But when I think about the state of the campaign and where we are on this ten-year milestone, I can say with utmost confidence that we've changed the narrative. Here's some of what we've learned:

Influencé Your Customers

Your customers listen to what consumers say and what they want. Consumers are the gatekeepers of many brands, and their perceptions are critical to how your customers feel about buying paper products and frankly, how they feel about getting out of plastics. I recall a story from a lobbyist in the plastic industry that really stuck with me for more than 25 years. The lobbyist was told by an influential person that, though he agreed with the plastic lobbyist's position, he couldn't act on that belief until the plastic industry made the broader public feel better about plastics. Even "influentials" are, at some level, followers, who want to act in accordance with their peers. P+PB's consumer focus paves the way for paper companies to compete by telling consumers what customers and other influentials already know – paper is the smart choice.



Takeaway #2: Reaching Younger Consumers Today is Vital to Future Perceptions of Paper

Research from the respected medical journal, *The Lancet*, conducted among 10,000 children and young people (aged 16–25 years) in ten countries (Australia, Brazil, Finland, France, India, Nigeria, Philippines, Portugal, the UK and the USA), revealed most youths are “extremely worried” about the impact of climate change, leading to a phenomenon called “climate anxiety.” Kids and young adults who struggle with this can feel as though they have no desirable future or that humanity is doomed. Educating and reassuring younger consumers about paper's sustainability, including both its recycling success and the success of forests preservation by paper companies, is critical to asserting the industry's rightful place as a sustainability leader.



Takeaway #3: Ecommerce Will Continue to Drive Residential Box Consumption and Consumer's Need to be Motivated to Recycle Them

Online sales are predicted to rise from 16.2% of all retail sales in 2024 to 20.0% by 2028, according to EMARKETER. Therefore, we need to continue to educate and persuade consumers to take the time to break down shipping boxes. Fortunately, we have a packaging reminder that is quite effective at motivating consumers to recycle, especially when placed on an inside minor flap on the top of the box where consumers can best see it. Adding this mark makes your customers look good to their customers.

A powerful message about the impact of recycling

QR code for your customers to scan & access our sustainability site

THIS BOX HAS UP TO 7 LIVES

OUR PLANET HAS ONE

EMPTY > FLATTEN > RECYCLE

Encourage recycling with simple instructions

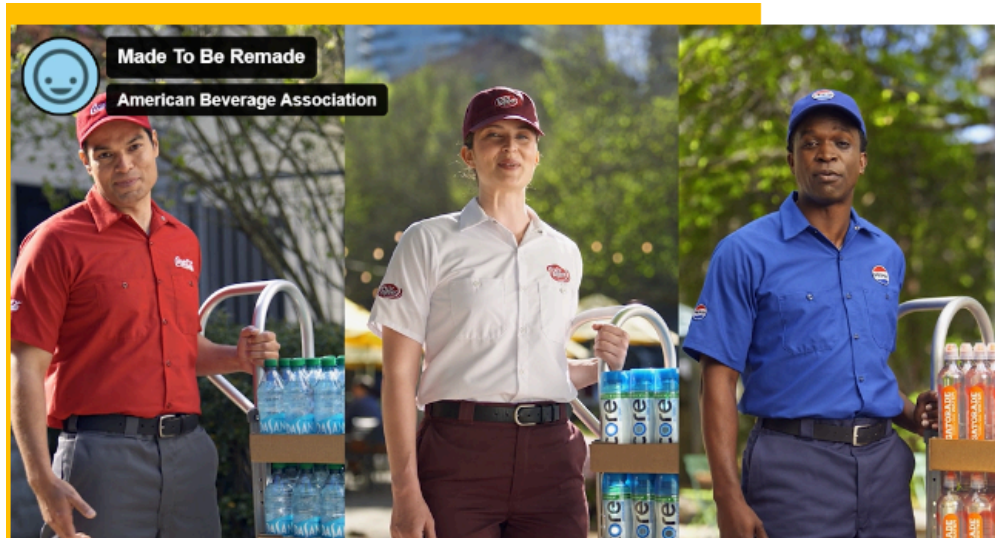
SCAN TO LEARN MORE

Call to action to drive consumers to scan

Takeaway #4: The Menace of Plastic is Our Opportunity

even preference for plastic packaging. Our data and their media coverage shows plastics is losing the war for public opinion, with some of the lowest scores we have ever measured. Consumers are not buying their recyclability narrative. And indeed, we know that the success story of paper recycling is in stark contrast to the challenges of plastic recycling. This continues to be an opportunity – being in the right place at the right time – to differentiate our recycling story from theirs.

In a small study looking at word associations, consumers associated “biodegradable” with oceans, marine life, breaking down naturally and cleaner water. It also was not something they associate with plastics. The complexity and ineffectiveness of plastic recycling is the plastic industry’s Achilles heal, and it can help us shine a light on paper’s contrasting virtues. But with three active plastics ad campaigns in the market, our natural fiber story needs to be told loudly.

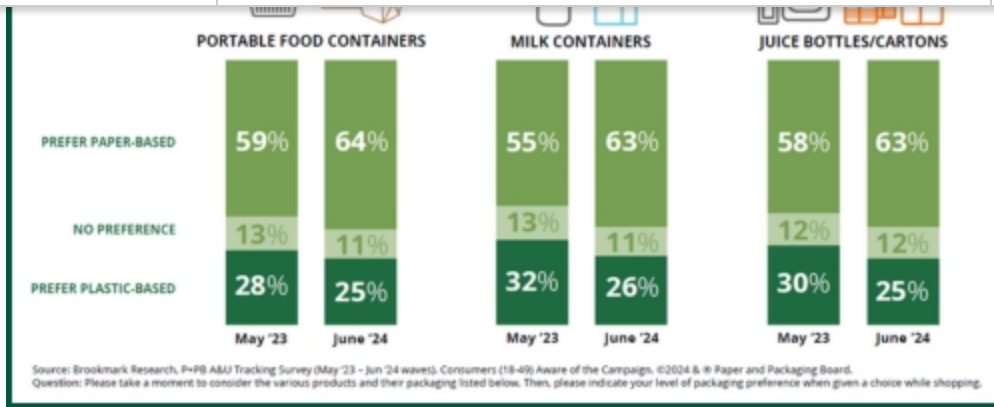


Takeaway #5: The Impact of the Campaign is Tangible

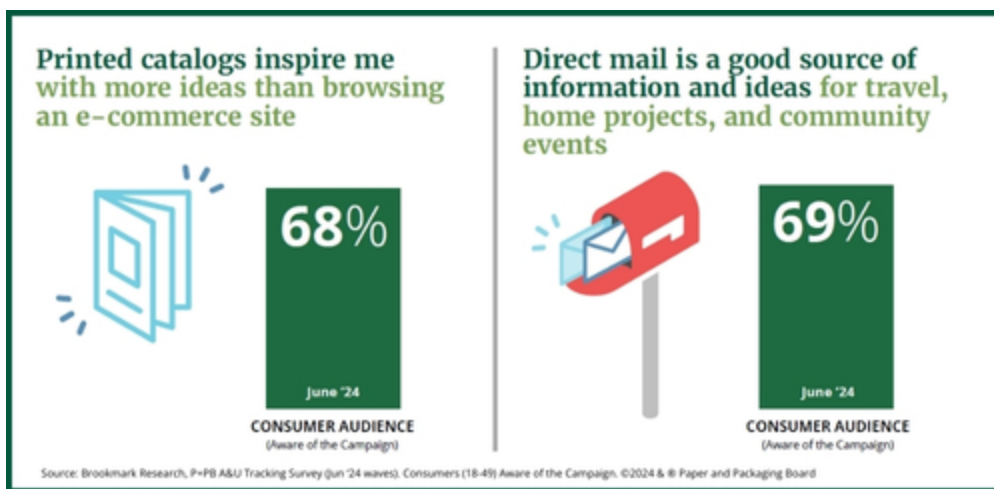
We use research to track consumers’ knowledge about forests and how it has changed over the last ten years. Today, 60% of consumers who have seen the campaign recognize that paper is a renewable resource and feel less worried about using paper-based products, up 16 points from 44% in 2015. Our “Go Papertarian” campaign, featuring comedian and actress Retta, is just one of the ways we give consumers a reason to engage with our messaging and material—to choose, use, and recycle paper products.

The bottom line is that the campaign is changing perceptions and producing important tangible results, which include:

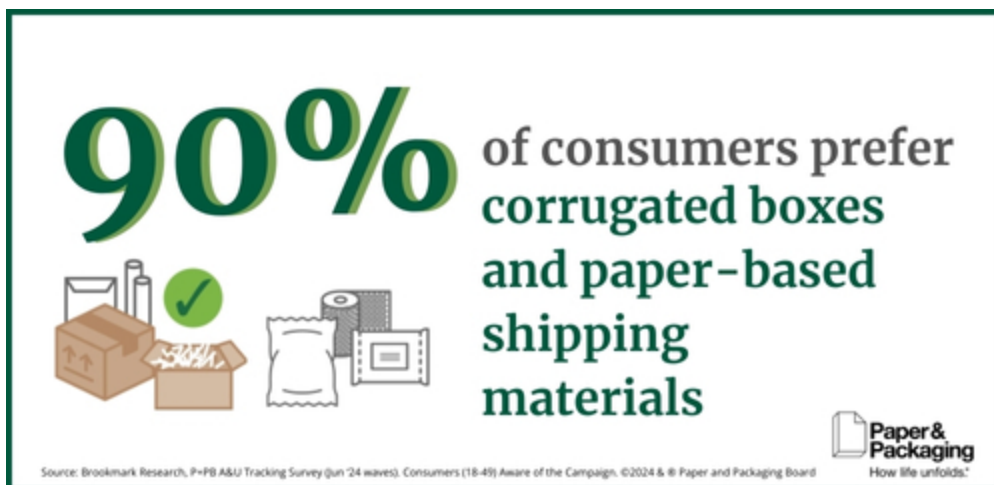
Increased preference for paper over comparable plastic products.



Continued consumer preference for printed catalogs, magazines and direct mail despite the ease and pervasiveness of digital.



E-commerce continues to grow transforming how consumers purchase everything from groceries to furniture with an impressive 90% of the consumers who have seen our campaign preferring their shipments in corrugated and paper-based packaging.



Consumers' hearts and minds are our focus, and we win them through our campaign. We have a smart, data-driven approach based on our consumer research and campaign-impact tracking tools. We are looking for new ways to share data and learnings with our companies as we jointly continue to reframe the narrative. And we

Together, we are better. Together, we can do more to gain customers and create and convert papertarians for life. Go Papertarian!



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10 YEARS
of Paper, Packaging
and Progress

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