

## Creating a New Industry Narrative

### Perceptions Aren't Just Changing. We're Changing Them.

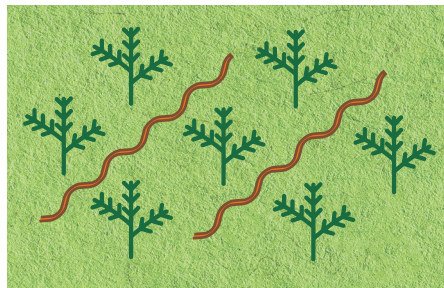
Consumers' perceptions about paper and packaging are evolving—and fast. In 2024, more people than ever understand that:

- Paper is a renewable, plant-based resource.
- Urbanization and wildfires are the real threats to forests, not sustainable management and productive use.
- The paper and packaging industry are part of the solution to the country's sustainability challenges, not part of the problem.

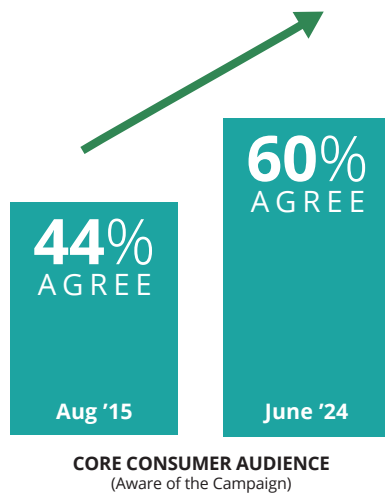
This shift didn't happen by chance. It is the result of strategic, unified messaging at scale—led by the Paper and Packaging Board in collaboration with paper manufacturers—ensuring that the industry's sustainability efforts and innovations remain front and center for both customers and consumers.

Through this campaign, the industry's ability to speak with one voice is critical, particularly as other materials, especially plastics, invest heavily to defend their products. By working together, we ensure that our message isn't just heard—it's collectively amplified, resulting in more favorable consumer perceptions towards the industry and its products.

#### Trees are Renewable



Consumers don't worry about using paper-based products because paper is a renewable resource



#### Top Contributors to Deforestation



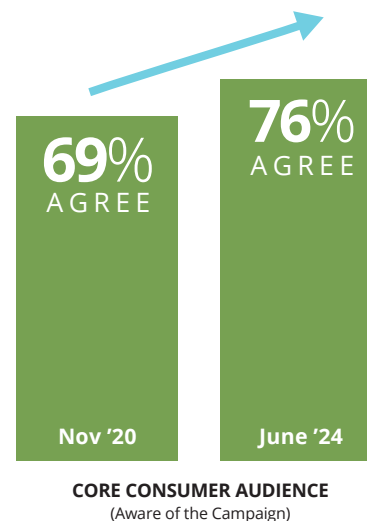
The clearing of land for development



Wildfires



#### Leaving the Environment Better



Consumers believe the paper and packaging industry is leaving the environment better than they found it

## 2024 CAMPAIGN IMPACT

Telling the industry's sustainability story shouldn't be understood as a "trend" or a "moment" that can fade with an election cycle, cultural shifts or even the emergence of a new generation. Sustainability has already helped define multiple generations, reorganizing vast swaths of the culture and economy as well as shaping the priorities and values of millions. And the core premise—that the planet's resources should be managed mindfully and with an eye toward the long-term—is only becoming more central to how broad cross-sections of consumers think and behave in America.

Gen Z and the emerging Gen Alpha—digital natives raised on climate headlines—aren't just concerned about the environment; they want to feel like they are part of fixing it. That's why it's critical to connect with them now, shaping their understanding of paper as the renewable, recyclable and smart choice for the planet. They're anxious about the future. There is also growing recognition of the health impacts of social media and phones on children. Combine that with the movement to get phones out of the classroom and students to take written tests, paper's tangible benefits are more relevant and desired than ever. Once again, paper is the smart choice for both the environment and distraction-free learning.

Consumers want solutions and can't do this alone. They are looking for brands, your customers, to lead the way. Brands are listening and looking for better material alternatives. That presents us with a once-in-a-generation opportunity to lead and play offense by demonstrating the value of sustainable packaging as a solution.

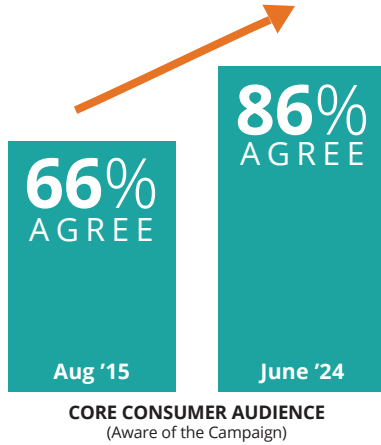
# Impacting Consumer Perceptions and Industry Reputation

We don't just tell the industry's stewardship story—we transform perceptions, shift behaviors and deliver results. Our work has measurably increased consumers' beliefs that paper and packaging are innovative and that our industry operates responsibly. And crucially, today they think more highly of brands that use paper. This creates value for the industry and return on investment.

## Industry Innovation



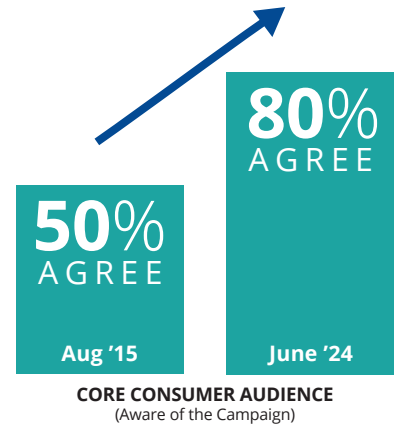
The paper and packaging industry makes innovative products



## Industry Trust



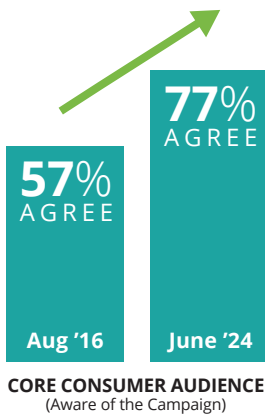
The paper and packaging industry is trustworthy



## Benefit vs Risk



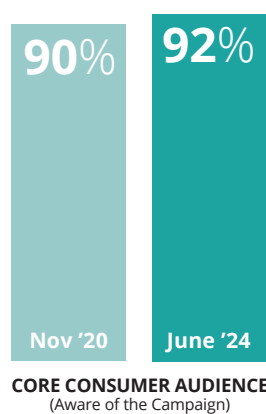
Consumers believe the benefits of using paper and paper packaging outweigh the risks



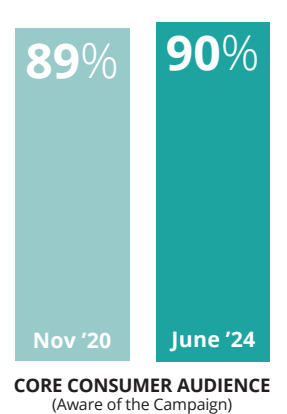
## Paper vs Plastic



Consumers prefer paperboard over plastic packaging



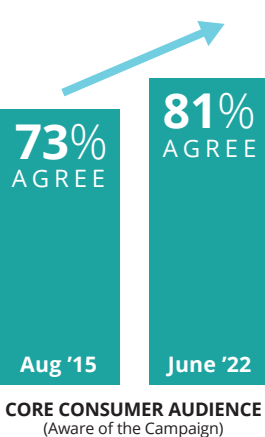
Consumers prefer corrugated over plastic packaging



## Paper Benefits

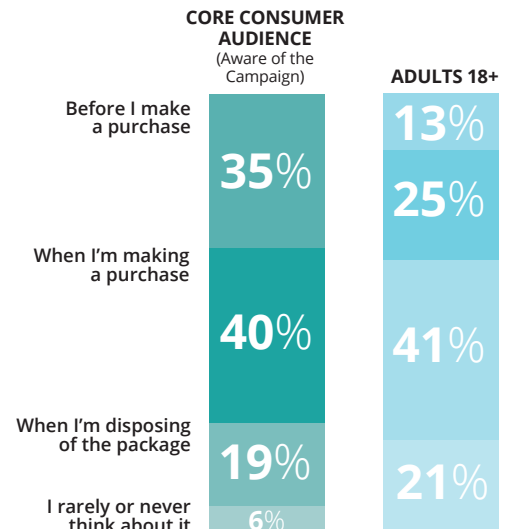


Even as tech becomes more advanced, paper continues to play an important role



## Recycling Education Matters

Consumers aware of the campaign are more likely to think about a product's recyclability before or when they buy compared to those who haven't seen the campaign (Adults 18+).



# Delivering Our Campaign Message at Scale

Over the last decade, we've evolved alongside consumers, reaching them where they spend time: on streaming TV, social media, podcasts, magazines and more. We're not just keeping up with their changing habits, we're shaping the consumer conversation. And the data? It speaks for itself.



Celebrating  
**10 YEARS**  
of Paper, Packaging  
and Progress

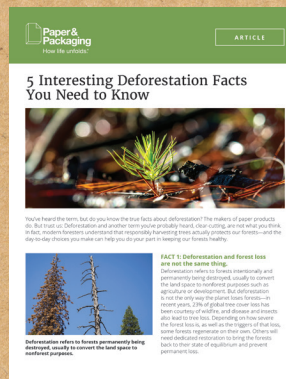
**300 Million**  
video views



We are getting our creative message out through avenues old and new, scoring more clicks and views.

**4 Million**  
web visits

**35%**  
MORE WEB  
VISITS THAN  
IN 2023



As consumers search for information online, our website articles debunking the myths about deforestation and clearcutting in the U.S. are popular, drawing up to 33,000 visitors a month.

Our work has measurably increased consumers' beliefs that paper and packaging are innovative and that our industry is trustworthy. And crucially, they now think more highly of brands that use our products. The reputational lift provides value and leads to increased ROI.

The growth in the industry's positive reputation over the last ten years has opened doors! Media coverage about the industry is significantly more positive. The industry is better positioned to champion its legislative and regulatory objectives. And paper is increasingly part of customers' consideration when it comes to making sustainable choices.

No one group can create a favorable marketplace for the industry which is why our collaborations with industry trade and sector groups are so important. Without this complementary and interwoven network, gaps emerge putting the industry at risk of not meeting its favorable marketplace objective.

**30%**  
of site visits

The papertarian home page is among our top-visited pages capturing nearly 30% of site visits.



TOP RATED PAGE

**8,580**  
online searches for the word  
**PAPERTARIAN**

Twice as many as the previous year.

**ARE YOU A PAPERTARIAN?  
TAKE THE QUIZ TO FIND OUT!**

**1.4 Million**  
took the papertarian quiz

Quiz takers learn about the lifestyle and look deeper at their habits. Do they make to-do lists on paper? Do they save and reuse corrugated shipping boxes?



For every dollar invested, the P+PB campaign returned to the industry

**\$13.96**  
IN PROFIT

# Bringing Our Story to Life

Through a powerful national advertising campaign we're connecting with consumers every day, reshaping attitudes and inspiring businesses to rethink their paper and packaging choices.

## Promoting the Papertarian Lifestyle in Magazines

Magazines are an important tool in our media wheelhouse. In *Us Weekly*, we tapped lifestyle expert and crafting guru Veena Goel Crownholm to show why she's a papertarian and why readers should be too! Veena discussed how easy it is to adopt sustainable habits like shopping for products packaged in paper and then recycling them.



## Influencers Engage Audience with Authentic Content

Environmental advocate, influencer and author Kathryn Kellogg gave viewers a behind-the-scenes look at the operations of a privately-owned forest, educating on the work that goes into caring and nurturing them.

## Living the Papertarian Way

Not only do papertarians choose and use paper, they also recognize and celebrate paper's strengths over digital alternatives. Our video ads showcased paper's unique ability to help us connect with each other and the world around us by poking fun at consumers' addiction to social media and paper's unique tactile qualities.



## Schooling College Students on Recycling

We are spreading the word on college campuses about recycling two popular items—pizza boxes and paper coffee cups. These efforts help dispel recycling myths and encourage consumers to recycle.