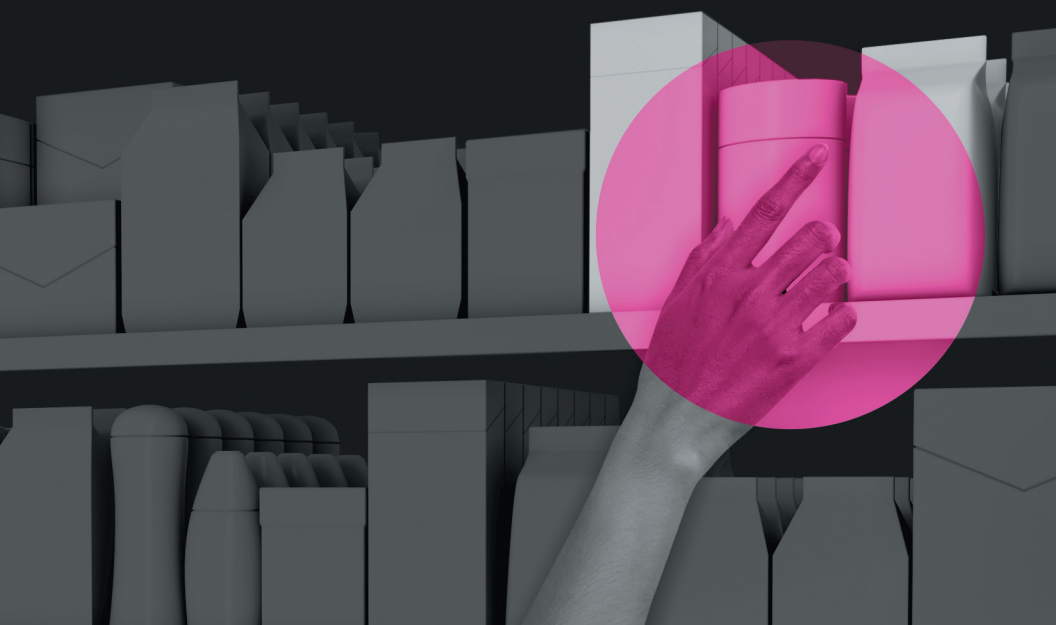


unPACKED.

Predict Packaging That Sells

Alex Hunt and Matt Salem



Advance Praise

“From design missteps to billion-dollar turnarounds, this book is a master class in navigating the high-risk world of packaging design change.”

—JENNIFER PICARD, GLOBAL INSIGHTS
TRANSFORMATION LEAD, OPELLA

“Behaviorally’s 4S framework gave our teams a shared language and the clarity to make fast, confident decisions.”

—KEN HAUSER, SENIOR MANAGER MARKET
RESEARCH, CHURCH AND DWIGHT CO., INC.

“This book dives into case studies and key packaging design principles every marketer should know.”

—JON ZUNICK, INNOVATION MANAGER, BAYER

“This book isn’t about tools—it’s about changing how we make decisions.”

—JOHN D. PFALZGRAF, DIRECTOR, CONSUMER
KNOWLEDGE, GEORGIA-PACIFIC

“This book is a must-read for any marketer serious about converting packaging into a revenue driver. The data doesn’t lie—visibility alone can 2.5x your likelihood of purchase.”

—SARA POLON, CO-FOUNDER AND CEO, SOUPERGIRL

“This book brilliantly captures what marketers have felt for years—packaging is your first, best salesperson.”

—NINO CIAPPINA, GENERAL MANAGER,
AUTOMOTIVE, WALMART MARKETPLACE

“Every CPG executive should read unPACKED. It’s a powerful reminder that packaging isn’t just a design tool; it’s one of your most overlooked and impactful growth levers.”

—NICK GRAHAM, FOUNDER, VERTEMIS

“This book is a must-have toolkit to understand value creation through packaging in a fast-changing consumer omni-channel shopping environment.”

—FRANCESCO VENTISETTE, EXECUTIVE DIRECTOR,
INSIGHT AND ANALYTICS, BAUSCH + LOMB

To anyone who has ever reimagined the predictive power of consumer insights, trading gut feel for evidence and precision. This book is for you.

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FOREWORD

—Bianca Pryor, AI & Insights Professional

The insights industry has always been in need of innovation. No, disruption. For decades, we have consistently worked to understand what shoppers and consumers want to influence behavior and ultimately, most importantly, drive sales. And in today's fragmented world, the stakes are insanely high. Stopping power and navigation cues are no longer enough.

That's what makes *unPACKED* such a timely and essential read.

Alex Hunt and Matt Salem have captured a transformation in the making. Drawing on decades of behavioral research and data-driven experience, they reveal how packaging design decisions can now be made with the speed, precision, and confidence today's brands demand. This isn't theory. It's not a list of best practices or a retrospective on good design. This is the future: packaging decisions powered by predictive insight, made in real time, and grounded in how people actually shop.

What sets this book apart is its clarity. It translates complex ideas into practical strategies without losing their depth. It's

packed with case studies, human stories, and market realities that anyone in our field will recognize immediately, from missed redesign opportunities to breakthrough successes. It's a handbook for navigating real-world challenges, with tools built for researchers, marketers, brand managers, and creative teams who want to get packaging right the first time.

unPACKED invites us to embrace better data and challenges us to rethink the very role of packaging research in brand building. As someone who has spent a career helping brands succeed and always pushing insights to add greater commercial value, I can confidently say this: If you care about driving results, this book belongs on your desk. Not someday—now.

Read it. Share it. Use it.

Because in our line of work, the margin between being seen and being forgotten is thinner than ever.

INTRODUCTION

Packaging drives sales. But it's harder than it looks.

In today's fragmented retail landscape, a great product isn't enough. Whether you're a global brand or a startup on shelf for the first time, your packaging has to do more—and do it faster. Your packaging must be seen, understood, trusted, and chosen. And it must achieve all of that in the blink of an eye, across physical aisles and digital thumbnails, for shoppers with infinite options and shifting expectations. Research methods and insights capabilities haven't kept up with this pace. This book showcases the disruptions that do that.

We believe packaging can become a source of strategic clarity. One that unites creative teams, insight professionals, and decision-makers around a common goal: to win at shelf. By productizing behavioral science, pairing it with our best-in-class database, and connecting it to sales data through predictive AI, we can finally align behind what truly drives purchase behavior. We can move faster, test smarter, and predict performance with unprecedented accuracy.

If you're a brand leader, insights professional, designer, or CMO

tasked with launching or evolving consumer goods, this book is for you. You'll learn how to navigate real-world packaging challenges, leverage data in new ways, and build internal alignment around designs that are not only creative but commercially successful.

Here's what this book is:

- A practical, story-driven guide to the future of packaging research
- A behind-the-scenes look at how leading brands are using behavioral diagnostics and predictive products to make better commercial decisions
- A handbook for faster, smarter, more collaborative packaging processes, each equally applicable to adjacent elements of the marketing mix

Here's what it isn't:

- A theoretical exploration of design thinking
- A dense academic treatise on AI or behavioral science
- A rigid methodology manual with a single way forward

We wrote this book because we've seen firsthand how much is at stake and how much potential is being left on the table. We've sat in the meetings, navigated the silos, and helped teams align around the packaging that performs. And now with the right products, the right data, and the right mindset, we believe it's possible to make those high-stakes decisions with confidence and precision.

In the chapters that follow, you'll explore how our predictive packaging engine works and how we've transformed decades of behavioral data into productized tools that help brands make faster, smarter, and more profitable packaging decisions. We'll

share real case studies from Behaviorally's clients, firsthand stories from the field, and insights drawn from the challenges brands face every day at shelf.

This is not just a book about methodology. It's a window into a new era of packaging research that delivers measurable commercial impact.

We believe the future of packaging research is predictive, dynamic, and deeply human. And we believe the time to embrace that future is now. In these pages you'll find not only a vision of what's possible, but a practical guide to the products, strategies, and mindsets that are already reshaping the way packaging decisions are made.

Let's turn the page and reimagine what packaging research can do.

Chapter 1.

PACKAGING IS MISSION CRITICAL

Walk down any chocolate aisle around the globe, and you'll see a rainbow of wrappers: some elegant, some nostalgic, some trying very, very hard to be edgy. But which packs actually work? Which packs get picked up, carried to the checkout, and converted into a purchase?

To find out, we rolled up our sleeves and analyzed the data. Our *unPACKED: Chocolates Report* took a deep dive into more than 300 chocolate SKUs in the US including established names, upstarts, and everything in between and measured how well each one performed across key behavioral metrics:

- How visible it is on shelf
- How shoppable it feels
- How desirable it seems
- Whether it ultimately makes the short list for purchase

Grounded in a behavioral study conducted by our team in August 2024, we analyzed the actions of roughly 3,000 chocolate shoppers across the US¹, and the findings were clear: Being seen is everything.

In the chocolate category, products that were most visible on shelf were more than 2.5x more likely to be purchased than those that weren't.² That number jumps even higher when you isolate the top-performing SKUs. Visibility drives sales. Period.

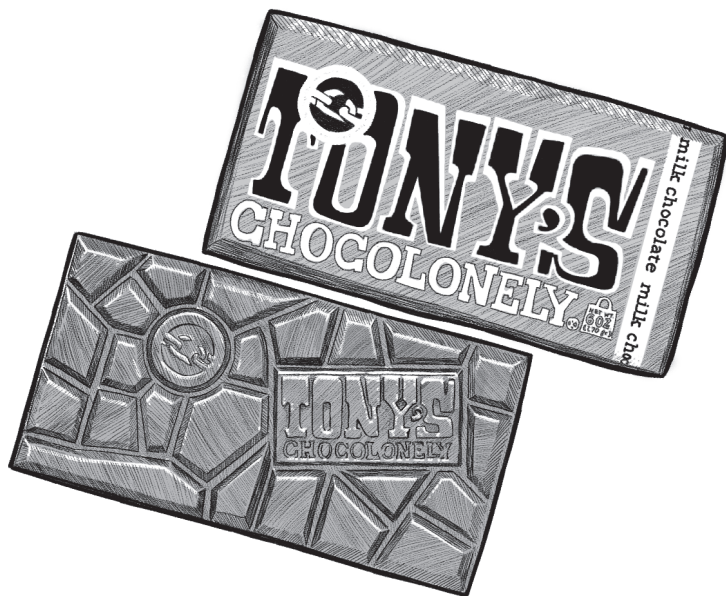
But visibility alone isn't enough.

Some packs were eye-catching but failed to communicate clearly. Others were seen but were difficult to find. And some blended into the background, losing opportunity for consideration in the first place.

We saw firsthand how shelf position, design contrast, brand blocking, and adjacent categories shape how chocolate is perceived and ultimately chosen. And we tracked the real behavioral impact of design decisions.

This is the power of unPACKED, our human-led, data-backed look at what drives performance in today's most competitive categories. Chocolate is just one example.

TONY'S CHOCOLONELY: CHOCOLATE'S BREAKOUT STAR



As of 2023, chocolate is a \$119.39 billion industry. By 2032, it's projected to grow to \$161.99 billion,³ but it's overwhelmingly controlled by a small handful of major brands, with the majority of sales coming from just 10 companies.⁴ That leaves hundreds of smaller brands fighting over what remains, making it incredibly difficult for new players to gain meaningful traction.

Tony's Chocolonely entered this ultra-competitive space with a mission-driven product: a premium chocolate brand dedicated to fighting child labor and unfair trade practices in the cocoa industry.⁵ But having a mission wasn't enough; they needed a way to cut through the noise, capture attention, and convince shoppers to switch from established brands.

With packaging that breaks all the rules, Tony's Chocolonely

stands out in the chocolate aisle, and that's exactly the point. While most chocolate brands utilize deep browns, golds, and elegant designs, Tony's goes bold with bright, eye-popping colors that practically jump off the shelf. The vibrant, clashing hues make it impossible to ignore, creating a visual explosion that grabs your attention instantly.

The brand name itself is big, loud, and deliberately chunky with irregular typography. It's slightly off-kilter, reinforcing Tony's rebellious, rule-breaking personality. This isn't just another polished, refined chocolate bar; it's a statement piece, loud and proud.

Tony's continues to defy the rules with an unconventional layout. Unlike the minimalist style of most premium chocolates, its packaging feels playful, imperfect, and unapologetically different. It's fun, vibrant, and full of personality, making it easy to spot and even easier to remember.

But Tony's doesn't stop at eye-catching design; it uses every element of its packaging to tell a story. Inside, the chocolate itself is divided into unequal pieces, a deliberate choice symbolizing the inequality in the cocoa industry. It's a powerful design decision that reinforces Tony's social impact mission, reminding consumers that their purchase supports the fight for fair trade and ethical sourcing.

Tony's Chocolonely proves that packaging can be more than just a wrapper. It can be a movement.

The results are undeniable. Tony's Chocolonely quickly became the fastest-growing chocolate brand in the US and UK capturing over \$200.1 million in revenue in 2023/2024.⁶

By using packaging as a marketing tool, Tony's Chocolonely turned an unknown brand into a sensation. One that stood out visually, ethically, and emotionally.

THE EMOTIONAL PULL OF PACKAGING

Take it from Tony Chocolonely: Successful packaging is about function and visibility.

But did you know that packaging is also a powerful tool for creating emotional connections? Brands work hard to create emotional ties with shoppers, so they can be selected at shelf *and* build loyalty with their customer. Packaging plays a critical role in reinforcing those feelings.

One way to see this in action is by drawing a comparison to advertising. Think about a heartfelt commercial like the ones featuring babies, families, or moments of joy. Those ads are effective because they tap into universal emotions, making consumers feel something about the brand. Packaging operates in the same way, just in a more immediate and visual form, often in the moment of purchase.

Let's look at diaper brands for example. It isn't easy to find a pack of diapers that doesn't feature a baby. The image isn't just decorative; it taps into the emotions of parents, reinforcing the instinct to nurture and protect. Even some brands that *aren't* baby-related use this strategy. Angel Soft toilet paper has long featured a baby on its packaging, leveraging that same emotional cue, but in this case to signal softness and comfort.

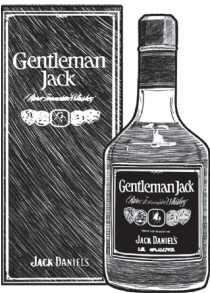
The same principle applies to food. A rich, indulgent visual of melted chocolate or a sizzling burger isn't solely about showing the product; it's about triggering desire. Appetite appeal is a direct emotional driver. It makes shoppers crave the product before they pick it up even if the burger in the packaging is still frozen.

Some brands use emotion more subtly. Claritin's packaging, with its bright blue sky and green fields, doesn't scream "allergy relief" in a literal sense, but it does create an emotional connection to freedom, relaxation, and being outdoors without discomfort. Instead of focusing purely on clinical benefits, it sells a feeling,

one that resonates deeply with allergy sufferers looking for an escape from their symptoms.

There are scientific and psychological reasons why certain packaging elements stick in consumers' minds. In this chapter, you'll discover why packaging matters not as a protective container, but as one of the most powerful tools a brand has to influence perception and drive growth. You'll learn how packaging works as a silent salesperson on the shelf, sparking emotional connections, reinforcing brand identity, and guiding consumers through the purchase journey. Through real-world examples, we'll show how packaging can elevate a product, create market differentiation, and even launch entire brands. Whether you're refining an established icon or trying to break into a crowded category, this chapter reveals why packaging isn't part of the product delivery alone; it is part of the product experience.

JACK DANIEL'S: ELEVATING A PREMIUM VARIANT



Gentleman Jack
Before



Gentleman Jack
After



Jack Daniel's

Jack Daniel's is one of the most iconic whiskey brands in the world, best known for its signature Old No. 7 bottle. But within its port-

folio sits Gentleman Jack, a smoother, double-mellowed variant aimed at premium whiskey drinkers.

While Gentleman Jack had some initial success, its original packaging closely resembled Old No. 7, using a square bottle structure and a black label. The issue? It didn't visually distinguish itself enough from the parent product, making differentiated and premium perception harder to command.

Jack Daniel's needed a packaging overhaul that would reinforce Gentleman Jack's premium positioning, and it delivered in a way that led to a staggering 40% increase in sales.⁷

The new Gentleman Jack packaging departed entirely from the traditional Jack Daniel's bottle shape. The initial redesign changes weren't subtle. They were strategic and bold, designed to elevate the brand's premium feel:

- A taller, more elongated structure: Moving away from the boxy Old No. 7 shape, the new bottle featured a sleeker, refined silhouette, instantly signaling a more premium offering.
- Metallic branding elements: The redesign incorporated metallic labels and accents, a proven tactic in the alcoholic beverage category that reinforces luxury and exclusivity.
- A premium cap and embossed details: These subtle but impactful touches created a stronger tactile experience, making the bottle feel as premium as the whiskey inside.
- Enhanced signature branding: Gentleman Jack's branding became more distinct, featuring elegant typography and embossed lettering that elevated its visual appeal.

The results of the redesign were undeniable: Sales shot up 40%, a rare and remarkable achievement in the ultra-competitive whiskey market.

This success speaks to a fundamental truth about premium

product packaging: Perception drives value. Consumers weren't just buying whiskey; they were buying the experience, and packaging played a crucial role in reinforcing that.

Jack Daniel's didn't change the whiskey inside the bottle; it changed how consumers perceived it.

The Gentleman Jack redesign is a prime example of how structure, material choices, and visual elements can come together to elevate a product's value perception without altering the product itself. By aligning the packaging with consumer expectations of a premium whiskey, Jack Daniel's successfully:

- Strengthened differentiation from its core product (Old No. 7)
- Increased perceived quality and value through metallics, structure, and branding cues
- Justified a higher price point and encouraged new consumers to trade up

Gentleman Jack's transformation proves that in premium categories, packaging isn't just a container; it's part of the product experience itself. And when executed well, it doesn't only elevate perception, but also directly drives sales.

WHY PACKAGING MATTERS

Packaging matters because it drives sales.

To understand why, we have to take a step back and look at the broader landscape of consumer packaged goods (CPG).

In 2024, the global CPG market was valued at \$2.299 trillion annually and is projected to grow to \$3.436 trillion by 2034.⁸

Beyond topline revenue, the CPG sector plays a pivotal role in the broader US economy. It contributes \$2.5 trillion in total eco-

conomic impact (nearly 10%) and supports more than 22.3 million American jobs.⁹

This impact is magnified by the sale of consumer goods in almost every market around the world.

This large industry is characterized by steady growth and tight margins. For years, global branding helped expand profitability, but today's consumers are more demanding, requesting more personalized experiences, and forcing brands to rethink how they engage and sell. For a CEO, growth is always top priority and is now harder to achieve than ever. Post-COVID-19, companies took advantage of pricing power and margin expansion when they could, but sustained growth remains a constant challenge. Many major CPG brands have faced disruption from activist investors, exposing just how tough it is to maintain momentum in this space. This is where packaging comes in. Unlike retail channels or product sizing, both of which involve trade-offs, design is one of the few levers brands fully control. Our studies show it can drive growth by as much as 5% (and poor packaging can *drop* sales by 5%), making it an essential, yet often underutilized, growth channel.

Beyond growth, packaging is also a major financial factor in a company's bottom line. It accounts for a significant portion of direct costs, estimated at around 8% (the industry-accepted average), which means any misstep is expensive. (Tropicana is a prime example: sales dropped 20% when it replaced its iconic packaging, resulting in an estimated \$30 million loss.) A packaging change isn't just a simple swap; it can require factory reconfigurations, new sourcing agreements, and supply chain adjustments. Getting it right is absolutely critical.

THE FACE OF THE BRAND

Packaging is more than just a protective layer. It's the face of the brand, the first impression that shapes consumer perception. Just as we read facial expressions to understand someone's mood or intentions, consumers read packaging to gauge a brand's identity. There's an energy behind it, a vibe that instantly communicates what the brand is all about. It's the way a brand dresses itself, influencing how we feel about it before we even engage with the product.

Think of packaging like attire; just as clothing sets expectations about a person, packaging sets expectations for a brand. If we showed up to an interview in a crisp suit, you'd have a different impression of us than if we showed up in gym gear. It's not just about the clothes themselves; it's about the context they create. The same goes for packaging. It gives shape to the brand, providing a tangible, touchable form that communicates quality, purpose, and identity.

It's also a powerful communication tool. Packaging sets expectations. It tells consumers what the product is, who it's for, and how it fits into their lives. It's the cover of the brand's book, and we all know how quickly people judge a book by its cover. Care needs to be taken so the first impression is not misleading, as this can make or break a sale. In a competitive market, the product with the more appealing package often has a leg up, even if the content inside is identical.

THE EXPERIENCE WITH THE BRAND

This perception-shaping power is so influential that packaging alone can change how consumers experience the product.

In a series of global taste and quality tests, bottled water brands including higher-end brands like Fiji didn't just underperform but

lost to tap water. Fiji's water ranked lower in taste, and its overall quality was lower, too.¹⁰

And before you assume that's a fluke, these tests were run across multiple regions with a variety of participants. Sometimes the bottled water edged ahead in quality but not always.

So why do we keep buying it? Packaging. That sleek, see-through bottle. The hibiscus-flower imagery. The curated typography and cool-toned color palette. It's all designed to whisper "pure" and "premium" into your subconscious. Packaging shapes perception, sometimes more powerfully than the product itself does. When done well, packaging doesn't just dress up a product; it elevates, reframes, and convinces us a product is worth the price. Even when it's just water.

It's the same principle as eating with your eyes. If you're served a beautifully plated dish versus a sloppy one, even if the ingredients are identical, your perception of taste and quality will be different. Packaging is the visual experience that sets the stage for the product itself. It creates the context, the anticipation, and ultimately the satisfaction of the purchase.

This is why packaging is so critical: It communicates the brand's story, establishes expectations, and shapes consumer experiences, all within a single glance. And in today's crowded marketplace, that first impression can make all the difference.

At its core, packaging decisions aren't only about aesthetics or marketing. They are high-stakes, mission-critical choices that impact everything from sales and market share to operational efficiency and financial performance.