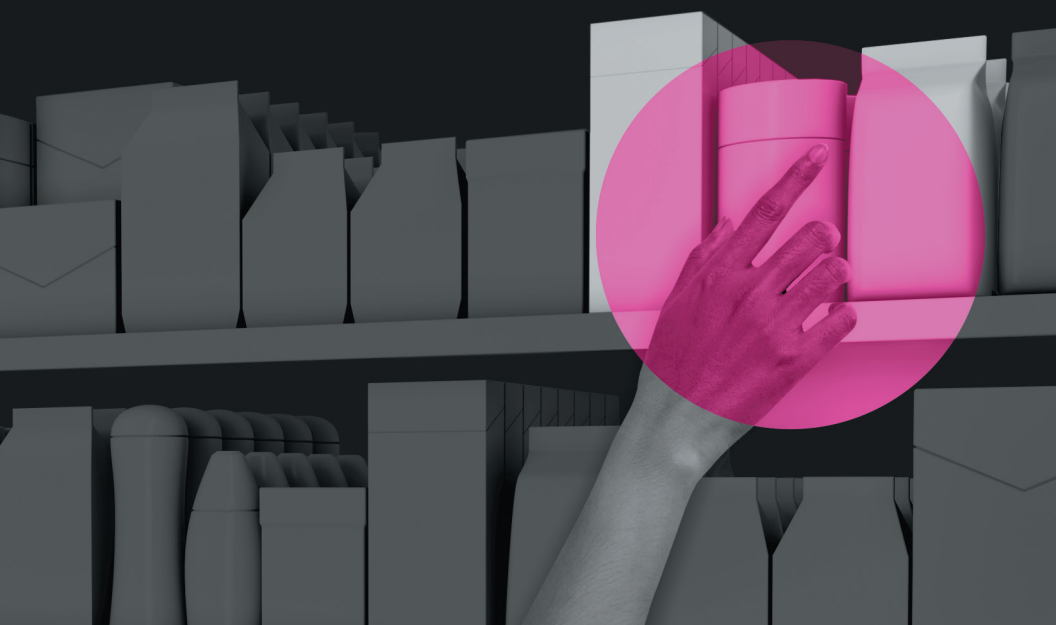


unPACKED.

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.

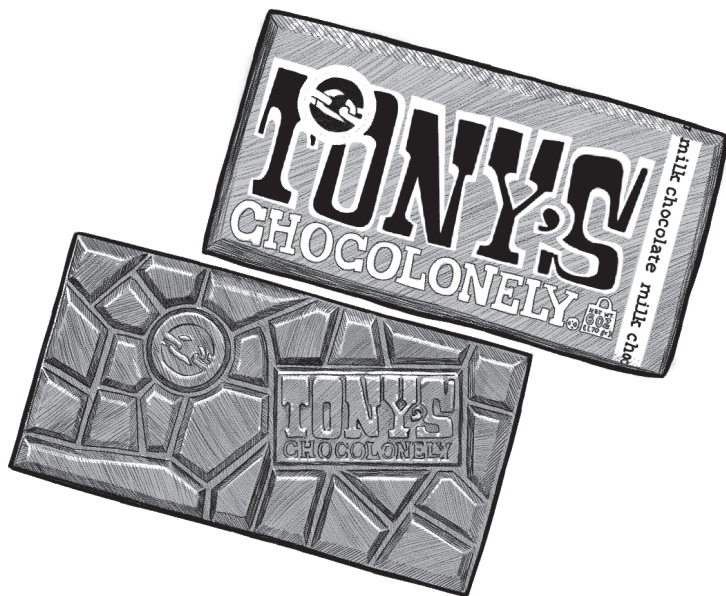
But visibility alone isn't enough.

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.

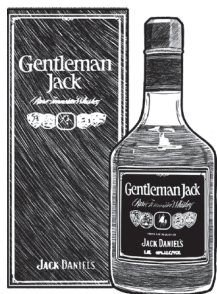
The same principle applies to food. A rich, indulgent visual of melted chocolate or a sizzling burger isn't solely about showing the product; it's about triggering desire. Appetite appeal is a direct emotional driver. It makes shoppers crave the product before they pick it up even if the burger in the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

nomic 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.

HEINZ 57: REINVENTING A CLASSIC WITHOUT LOSING IDENTITY



Few brands have packaging as instantly recognizable as Heinz Ketchup. The classic glass bottle, the “57 Varieties” label, and even the ritual of tapping the “57” to get the ketchup flowing have all become ingrained in consumer culture.

But as consumer habits changed, Heinz faced a challenge: The glass bottle, while iconic, wasn’t always convenient. People struggled to get the ketchup out, often resorting to shaking, banging, or using knives. The functional limitations of the original bottle opened the door for innovation, but Heinz had to be careful. How do you modernize a classic without losing what makes it iconic?

Heinz executed a multistage evolution of its packaging that preserved its brand equity while significantly improving functionality.

THE GLASS BOTTLE AND THE RITUAL OF THE “57”

The iconic “57 varieties” slogan on Heinz products was never meant to reflect the actual number of items the company offered.

When founder Henry J. Heinz introduced the phrase in 1896, the brand already had over 60 products; he picked the number 57 purely for its marketing charm (5 was his lucky number, 7 was his wife's, and he believed the number 7 held universal psychological appeal).¹¹ Despite its inaccuracy, the number stuck and has become a core part of Heinz's brand identity ever since.

It also isn't just a branding element. The "57" embossing on the neck on the glass bottle proved to be functional, too. Consumers are instructed to tap the "57" to release the ketchup, a trick that has become part of the brand's cultural identity.¹²

This design choice blended brand recognition with user experience, reinforcing that Heinz wasn't just selling ketchup; it was selling a time-honored way to enjoy it.

THE UPSIDE-DOWN SQUEEZE BOTTLE

As consumer demand for convenience grew, Heinz introduced an upside-down plastic squeeze bottle, a major departure from its traditional glass design. To maintain its brand identity, Heinz flipped the label so that even when stored cap-down (for easy dispensing), the branding remained right side up.

This simple but intentional design choice ensured that even with a structural change, the Heinz brand remained front and center.

A NEW ICON IS BORN

Over time, the upside-down squeeze bottle became as iconic as the glass version. Packaging innovation, when executed well, can become part of a brand's legacy rather than replacing it.

The old glass bottle is now a nostalgic symbol, often found in classic diners and restaurants, while the squeeze bottle has

become the everyday staple in homes. The squeeze bottle quickly became the preferred format, especially for home use, reducing complaints about ketchup being difficult to dispense.¹³

The packaging shift also led to increased brand loyalty, as Heinz successfully made the switch to convenience without sacrificing its heritage, an accomplishment in the CPG industry.

Heinz 57 is an example of a brand that successfully straddled 2 worlds: maintaining the nostalgia and cultural cachet of its original design while embracing modern functionality to stay relevant.

- The glass bottle represents brand heritage and tradition.
- The upside-down squeeze bottle represents convenience and modern usability.
- Both designs remain instantly recognizable as Heinz.

The key lesson? Iconic packaging can evolve without losing its essence. By respecting what made the original design special while addressing real consumer needs, Heinz didn't just modernize its product; it expanded its legacy.¹⁴

PACKAGING DRIVES SALES

A well-designed visual doesn't just catch the eye. It also emotionally connects and guides the shopper through the decision process. Every element should work together seamlessly, confirming that this is the right product, the right flavor, the right scent, and the right size. If a shopper has to hunt for key information or feels like the design is jumping from one place to another without a clear flow, the packaging isn't doing its job.

When done right, label architecture tells a story, creating a natural and intuitive experience. The shopper's eyes move effortlessly across brand name, visual cues, and key benefits to seal the

deal. It's not just about looking good; it's about making the buying decision easy, fast, and instinctive.

Because at the end of the day, packaging isn't *just* a product's outfit but a tool that elicits behavior and persuasion.

Packaging persuades and drives sales in 3 powerful ways:

1. Reinforces brand loyalty
2. Attracts new customers
3. Guides shoppers through the purchase funnel

All play a crucial role in influencing consumer behavior and ultimately driving purchases.

REINFORCES BRAND LOYALTY

Packaging reassures loyal customers that they're making the right choice. It's about familiarity and consistency. When you walk down the aisle looking for a brand you know and love, the packaging needs to be exactly what you expect. Changes big or small can cause hesitation, leading to a moment of doubt.

We've all experienced it: reaching for a familiar product only to pause because something looks slightly off. That moment of uncertainty can be the difference between a purchase and walking away.

This is why consistency is so critical. Packaging should seamlessly carry consumers through their habitual buying process. When executed well, big or small changes can reinforce trust and loyalty, ensuring repeat purchases without interruption. Consistency keeps customers engaged and coming back for more by delivering the same promise they've come to expect every time they interact with the product.

ATTRACTS NEW CUSTOMERS

On the other end of the spectrum, packaging is also a powerful tool for attracting new customers. It serves as an invitation to try something new, appealing to consumers' innate curiosity and desire for new experiences. Whether it's a bold color, an innovative structural design, or an intriguing message, packaging can lure shoppers in even if they've never seen or heard of the product.

In fact, packaging can function independently of other marketing channels. It can capture attention, spark interest, and convert a browser into a buyer all on its own. It's the silent salesperson on the shelf, speaking directly to consumers and persuading them to give the product a try. Especially in CPG categories where people are more willing to experiment, effective packaging can drive trial and expand a brand's customer base.

GUIDES CONSUMERS THROUGH THE PURCHASE FUNNEL

Packaging drives sales by reinforcing brand messaging and guiding consumers (new and old) through the purchase funnel. It connects the dots between various touchpoints, creating a cohesive brand experience.

Imagine seeing a memorable ad, whether in person, on TV, or online, and then spotting the product in-store with packaging that perfectly aligns with the campaign's visuals and messaging. That moment of recognition helps complete the sale. It's the bridge between awareness and purchase, linking all elements of the marketing mix into one unified experience.

Packaging doesn't just influence the point of sale. It enhances the entire customer journey. It reinforces campaign messages, builds brand equity, and creates a seamless transition from marketing to purchase, ensuring that consumers feel confident and excited about their choice.

A HIGH-STAKES REDESIGN: MATT'S STORY

In 2010, a major beer brand underwent a significant redesign that changed the face of its iconic brand, moving from short and stout packaging to sleek and thin packaging. This was no ordinary packaging refresh. This was a seismic shift that would redefine the brand's global identity. And behind the scenes, our team was at the heart of it all, leading the packaging research and testing that would make or break this transformation.

We lovingly code-named the project "Monster," and it lived up to its name. It was colossal not only in scope but in impact. This project wasn't just about testing a few new designs; it was about evaluating every possible iteration for the company's bottles and cans and even for the secondary packaging (the 6-pack holders and cardboard carriers). This initiative aimed to modernize the brand's image and enhance its appeal to contemporary consumers.

It was a major change.

Key features of the redesign included:

- **Pressure-Sensitive Label (PSL):** Transitioning from glue-applied labels, the brand adopted pressure-sensitive labels for its bottles. This change allowed for a cleaner, more premium appearance and facilitated easier recycling processes.
- **Bottle Shape and Design:** The new bottle featured a taller, slimmer neck and stronger shoulders, giving it a more modern silhouette. An embossed name and a strategically placed thumb groove were added to improve grip and maintain the beer's cold temperature longer.
- **Unified Global Identity:** The redesign was implemented across all 170 markets where the brand is sold, ensuring a consistent and recognizable brand image worldwide.

This comprehensive overhaul extended beyond the primary bottle to include cans and secondary packaging elements like 6-packs and even draft kegs, all featuring updated graphics to reinforce the brand's upscale positioning. While not the most recent change, this 2013 redesign laid the groundwork for subsequent packaging innovations by establishing a cohesive and modern brand aesthetic.

The company's short-neck bottle was an icon, linked to the brand's identity. Changing that shape wasn't just about aesthetics; it was about challenging decades of brand association and consumer loyalty. We knew we had to get this right, no matter what.

As always, there was no room for error. Every detail mattered. We combed through mountains of data, double-checking every insight and making sure our recommendations were airtight. We needed to give the brand the confidence to make the right decision.

The brand team followed our recommendations, and the impact was undeniable. The new design went to market and brought global consistency to the company's look, reinforcing its brand equity while modernizing its appearance. The long-neck bottle was more than a new shape; it was a statement, a bold step forward that retained the brand's iconic status while evolving with the times. It was a huge success, and we were at the heart of making it happen.

PACKAGING CREATES OPPORTUNITIES

Packaging isn't only a necessity for protecting and transporting a product, but it's also a strategic tool that can either drive growth or hold a brand back. It's a source of opportunity, opening new doors for expansion, innovation, and increased sales.

One of the biggest opportunities lies in brand expansion, which drives revenue and growth, enhances product experiences, and creates loyalty and trust. Packaging enables brands to introduce line extensions, whether through new product variants, seasonal designs, or limited-time offerings. Kleenex, for example, tweaks its box designs for different seasons: winter themes in colder months, and fresh, floral patterns to boost sales in summer. Similarly, many brands tap into flavor trends, like introducing a pumpkin spice variant during fall, using packaging to communicate new and exciting offerings.

Beyond line extensions, packaging plays a critical role in launching entirely new brands.

Remember Tony's Choclonely?

What about new brands operated by a massive parent company? Many consumers don't realize that Procter & Gamble owns an enormous portfolio of brands they created (like Swiffer, Febreze, and Cascade) or that Pepsi and Coca-Cola go beyond soft drinks (LifeWTR is a PepsiCo brand and Dasani is Coca-Cola's own bottled water). When done right, introducing new brands can be a game changer, allowing companies to compete in new spaces without diluting their core brand equity.

Another major packaging opportunity is to drive incremental purchases. Once consumers are engaged with a brand, the right packaging can encourage them to buy more. This could mean introducing a new type of pizza crust or a different take on a classic beverage, like milk (there's coconut milk, soy milk, almond milk, and more recently: oat milk), giving existing customers more reasons to stay within the brand's portfolio. Rather than always chasing new consumers, brands can focus on deepening their engagement with those they already have.

This mirrors how businesses grow either by acquiring new clients or increasing value from existing ones. It's the same in retail: Brands can either attract new shoppers or encourage loyal consumers to buy more, more often. Smart packaging strategy fuels both.

In the end, packaging isn't just about containment; it's about expansion, differentiation, and driving sustained growth. When brands get it right, packaging doesn't only reflect success, but it *creates* success.

RXBAR: STANDING OUT IN A CROWDED NUTRITION BAR MARKET



Before



After

The protein/energy bar aisle is oversaturated with competition. Between established brands like Clif, Quest, Kind, Pure Protein, PowerBar, and Think!, newer entrants often struggle to carve out a distinct identity.

Early on, RXBAR faced this exact problem. Their original packaging was cluttered with fruit imagery, generic design elements, and horizontal layouts that blend into the sea of competing bars rather than stand out.

But then came a bold shift in branding and packaging. One that completely repositioned RXBAR in the market and led to a significant increase in sales.

RXBAR's breakthrough came when they redesigned their packaging with a no-nonsense, minimalist approach that put ingredients front and center. Instead of showing fruits, indulgent visuals, or lifestyle imagery, the new design featured:

- A vertical orientation for stronger shelf presence
- A plain, single-color background to create immediate contrast
- The core ingredients listed in large, bold text (e.g., 3 Egg Whites. 14 Peanuts. 2 Dates.)
- A short tagline: "No B.S."

This design did 2 things at once:

- It cut through the visual clutter of the protein bar category, making RXBAR instantly recognizable.
- It reinforced the brand's value proposition of clean, simple ingredients and no unnecessary additives.

The shift in packaging wasn't just a design refresh; it better positioned RXBAR in the market. The minimalist approach turned into a brand philosophy, allowing the packaging itself to serve as a proof point of product transparency.¹⁵

The results? A dramatic increase in sales, with RXBAR quickly growing into a leading player in the protein bar category. Eventually, the brand's momentum led to its \$600 million acquisition by Kellogg's in 2017.¹⁶ This is proof that a well-executed packaging strategy can transform a niche product into a mainstream juggernaut.

RXBAR's success highlights a key principle of visual branding: Sometimes, the best way to stand out is to strip everything away.

By removing distractions and focusing on what mattered most (the ingredients), RXBAR turned its packaging into a marketing tool that required zero explanation. Shoppers could glance at the bar and instantly understand what's inside, what's not inside, and why the bar is different from everything else on the shelf.

RXBAR proves that packaging isn't just a wrapper. It's a statement. When done right, it doesn't just complement the brand. It becomes the brand.

TRULY ICONIC PACKAGING

When people think of their favorite brands, they don't just recall the name; they see the packaging.

And we know that packaging drives sales.

Across best-in-class examples, the visual identity of a product is inseparable from the brand itself, and in many cases, packaging is what makes a brand iconic.

Coca-Cola is a perfect illustration. When you picture Coke, you likely see the red and white color scheme, the flowing script logo, or the hourglass-shaped bottle. Even if the label was removed or distorted (say, replaced with a generic squiggle), you'd still recognize it. That's the power of visual branding in packaging.

The same holds true for brands like Pringles, with its unmistakable can, or Starbucks, whose siren logo and green accents are instantly familiar. The soft blue and pink hues on Johnson's Baby Powder's white bottle are visual markers that immediately trigger brand recognition. This level of familiarity isn't just a by-product of marketing; it's a strategic advantage. The strongest brands use their packaging as an owned asset that reinforces

trust, strengthens emotional connection, and extends into other marketing channels.

A red soda can instantly signals Coca-Cola, and a simple green-and-white mermaid silhouette gives away Starbucks.

A STRATEGIC WEAPON

Packaging drives sales. It is a strategic weapon, a storyteller, and an emotional connector. As Tony's Chocolonely proved, packaging can be a movement, not just a marketing tool. In a crowded \$119.39 billion chocolate industry dominated by established brands, Tony's thrived while breaking all the rules. Bold colors, chunky typography, and a powerful story of social impact set Tony's apart, proving that packaging can inspire loyalty, create emotional bonds, and drive explosive growth.

But as powerful as packaging can be, it's also one of the riskiest levers a brand can pull. One misstep can confuse loyal customers or fail to attract new ones. Just as Tony's Chocolonely used packaging to stand out, other brands face the challenge of maintaining relevance without losing trust. The next chapter explores these challenges, diving into the complexities of packaging decisions and the high stakes that come with getting it wrong.

In an ever-changing retail landscape, where first impressions make or break a sale, the stakes couldn't be higher. Let's explore why navigating these challenges is mission critical for any brand looking to compete and win.

TL;DR: Packaging Is Mission Critical

- **Challenge:** Packaged goods brands work across some of the most competitive, margin-sensitive industries on the planet. In 2024, the global CPG market was valued at \$2.299 trillion, and shoppers are bombarded with visual choices on shelves that make it hard to stand out, especially for new or niche players. In this environment, packaging has to do more than contain a product. It must capture attention, shape perception, and drive sales.
- **Traditional Limitations:** Packaging decisions have long been treated as aesthetic or executional rather than strategic. Many brands overlook the functional and emotional role packaging plays at shelf, resulting in missed opportunities to reinforce identity, attract trial, or deepen loyalty. When packaging misfires, the cost isn't just creative but commercial, as brands risk shelf invisibility, consumer confusion, or outright sales decline.
- **Our Solution:** Packaging is more than a business lever. Through behavioral observation and real-world testing, we reveal how packaging influences consumer behavior and commercial performance. From standout brands like Tony's Chocolonely to legacy icons like Heinz and Jack Daniel's, we demonstrate how smart, strategic packaging drives growth, communicates brand essence, and reinforces emotional connection.
 - **Key Benefits:**
 - Shapes perception and emotional response before trial
 - Reinforces brand identity and loyalty
 - Serves as a competitive differentiator at shelf
 - Connects advertising to the moment of purchase
 - Creates opportunities to expand, capitalize on premium assets, and innovate

- **Impact:** Whether launching a new entrant like RXBAR or evolving a classic like Heinz, smart packaging strategy transforms a visual asset into a commercial one. It increases trial, deepens loyalty, and drives measurable sales growth. In today's retail landscape, packaging is no longer optional: It's essential. And when done right, it becomes the brand.