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DAL 1877

Barilla[®]

PREMIUM UNDER PRESSURE

How Packaging Helps
Brands Win at Shelf

 **QUIRK'S**
MEDIA



Today's Speakers



Amir Jamil

Associate Director, Analytics,
Insights & Capabilities



**Leads analytics and
Insights to drive strategic
decision-making.**

Connects consumer behavior,
market dynamics, and business
goals to shape smarter strategies
and unlock growth opportunities.

Erin Inventor

Insights Manager



**Translates consumer
and shopper insights into
actionable strategies for
brand growth.**

Works across teams to understand
real-world product and packaging
experiences and guide decisions
across innovation, branding, and
communication.

Cliff Kane

Senior Director, New Business
Development



**Helps brands apply
behavioral research to
marketing and packaging
decisions.**

Focuses on understanding how
consumers actually behave in real
shopping environments to drive
better business outcomes.

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The New Reality of Premium



Premium is Growing and Getting Crowded

- Premium is no longer a quiet shelf segment
- Established brands are trading up shoppers
- New entrants are winning attention through packaging



Standing out is harder even for brands with strong recognition

The Shelf is a High-Speed Environment

- Shoppers scan, filter, and move on
- Decisions happen in seconds, most packs are **never fully processed**
- Visibility in the first few seconds matters **disproportionately**

What this means for the brand:

- Packaging must signal relevance instantly
- Packaging must guide navigation
- Packaging must justify premium positioning



If the story is not clear quickly, the product risks being ignored. **Packaging is not just seen, it shapes choice.**





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Business Case

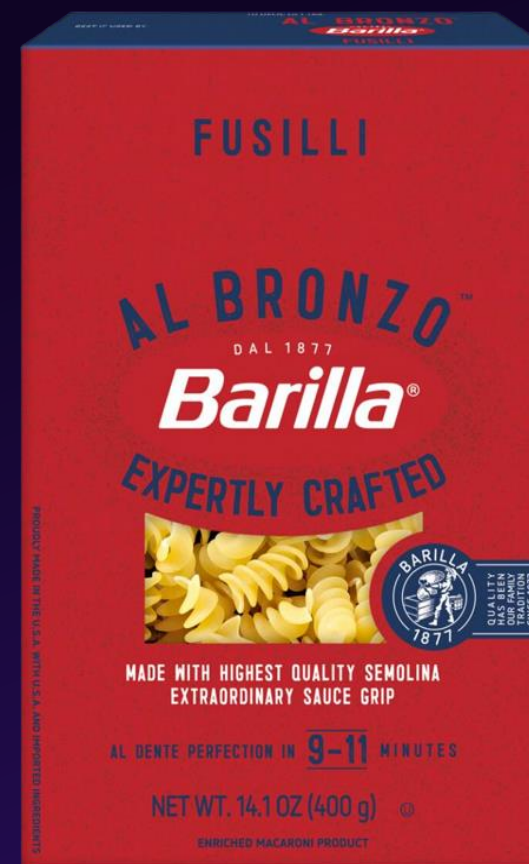


Barilla Al Bronzo

- Premium pasta line
- Focus on texture, quality, craftsmanship
- Designed to elevate the category

Despite a strong start, there was a challenge:

- Barilla associated with Blue Box (mainstream premium)
- "Bronze die cut" misunderstood
- Box format vs bag competitors
- US vs global differences in premium cues
- Repeat purchase not meeting the goal



The Brief

- Does packaging clearly signal premium?
- Does packaging justify the price?
- Does packaging stand out on shelf?

?

The question was
“whether the packaging
reinforced the premium story
strongly enough”



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The Methodology



Testing Packaging in Realistic Shelf Conditions

Virtual shelves and real shopping tasks

Behavioral measures of notice, navigation, and choice

Eye Tracking to understand what gets processed

Multiple rounds, not one single design decision



Shelf Eye Tracking & Virtual Shopping & Navigation



Eye Tracking Standalone



RTM & Survey



Built for Real-World Complexity

- Three regional shelves (Shelf 1, Shelf 2, Shelf 3)
- Different assortments and private label presence
- Tested against multiple shelf realities, not one idealized shelf

Shelf 2



Shelf 1



Shelf 3

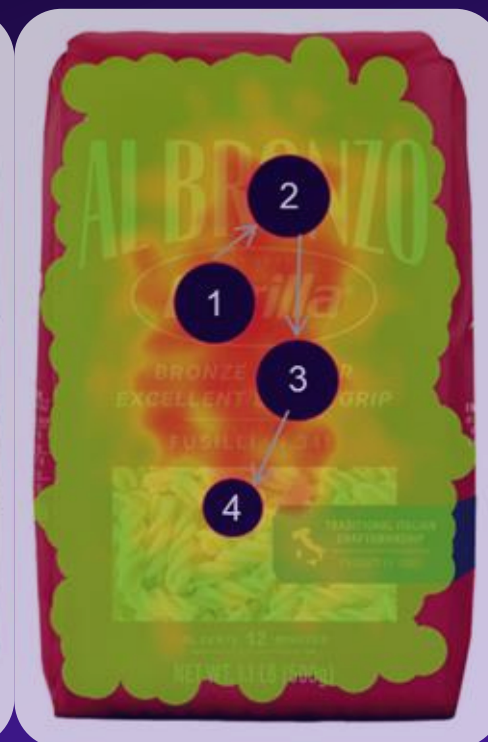


Understanding Attention

Eye-tracking shows what gets seen first

The results link attention to choice

It reveals what is missed



From No Improvement to Breakthrough

Round 01

Cell 01: Current Design

Cell 02: New Design A

Cell 03: New Design B

- No clear improvement vs current
- Issues in value and navigation
- Some strong isolated communication

Round 02

Cell 01: New Al Bronzo

Cell 02: New Al Bronzo Next

Cell 03: New Next

- Al Bronzo Next architecture performing strongly
- Value perception recovers
- Stronger premium communication



*Product name and package design for illustrative purposes only

Balancing Performance and Reality

Internal Considerations

- Next performed strongly
- It was not fully aligned with the desired direction

Round 03

Cell 01: New R3 Al Bronzo

Cell 02: Competitor A

Cell 03: Competitor B



- Final Al Bronzo design tested
- Benchmarked vs competitors
- Balanced performance and brand consistency

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What We Learned



Be Seen & Be Found

- Visibility in the first 5 seconds remained strong
- This protected the product's chance of entering consideration
- Even with more SKUs present later, navigation stayed stable

Visibility on shelf at 1st glance (5s)



Current Design

New A

New B

R2 AI Bronzo

R3 AI Bronzo

Respective brand block



● Overperforming ● Underperforming

The redesign improved communication without introducing confusion. Better premium signaling did not come at the expense of usability.

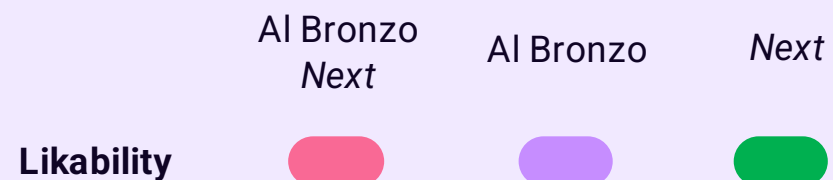


Naming

- Premium was not just about color or layout
- Naming and element order changed how the pack was interpreted
- Different routes emphasized different kinds of premium meaning
- One route felt more “exclusive”, another better supported craftsmanship and functionality



Name ranking in isolation (no visual)
Rank 1+2+3



● Overperforming ● Underperforming



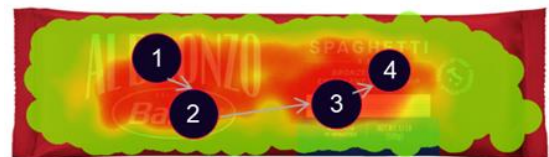
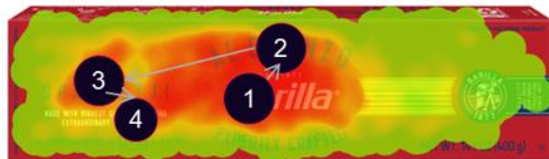
This is where the project moved beyond redesign into **strategic packaging architecture**



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Eye Tracking Made the Hierarchy Problem Visible

- Earlier versions over-concentrated attention on the brand
- Important supporting cues were under-processed
- Rebalancing the pack made more of the story visible



This is where the project moved beyond redesign into **strategic packaging architecture**

Premium Communication Through Specific Cues

- Quality and craftsmanship had to be made explicit
- Premium packaging has to “sell” before the product is tasted
- The strongest packs made the value story easily understood



	Current Design	New A	New B	R2 Al Bronzo
Pack Perception (TB)				
Premium	Green	Red	Green	Green
A craft/artisan product	Purple	Red	Green	Green
RTM - Explicit				
Bronze Cut Pasta	Red	Green	Green	Green
Holds More Flavor	Red	Purple	Green	Purple
Traditional Craftsmanship	Green	Red	Green	Green
Excellent Sauce Grip	Red	Purple	Green	Red

Green Overperforming Red Underperforming

Premium is not one signal. It is a system of reinforcing cues:

Ingredients

Quality

Texture / Sauce performance



Did It Change Behavior and Protect the Brand?

- Improved shopper buying behavior vs previous iterations
- More shoppers chose the product
- Brand image remained stable



This is the balance every redesign tries to achieve: **change enough to improve, not so much that you lose what already works**



Purchase from the shelf

- Brand level
- Sub-brand level
- Short cuts
- Long cuts



	Current Design	New A	New B	R2 AI Bronzo	R3 AI Bronzo
Brand level	Red	Green	Green	Green	Green
Sub-brand level	Green	Green	Green	Red	Green
Short cuts	Green	Green	Green	Red	Green
Long cuts	Green	Green	Red	Red	Green

Brand Image

- Brand I trust
- High-quality brand
- Brand for someone like me
- Brand I will buy in the future
- Brand I would recommend
- Elevates my meals
- Better than other brands



	Current Design	New A	New B	R2 AI Bronzo	R3 AI Bronzo
Brand I trust	Green	Red	Green	Green	Green
High-quality brand	Red	Red	Green	Green	Green
Brand for someone like me	Green	Green	Red	Green	Green
Brand I will buy in the future	Green	Red	Red	Green	Green
Brand I would recommend	Green	Red	Green	Green	Green
Elevates my meals	Green	Red	Green	Green	Green
Better than other brands	Red	Red	Green	Green	Green

Green Overperforming Red Underperforming



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What This Means

What This Meant for Barilla

- Better alignment around decisions
- Less debate based purely on opinion
- Retailer acceptance of optimized packaging, allowing for distribution gains



“

Packaging is a behavioral tool, not just a design exercise.

”

In Closing

Winning the premium shelf is an ongoing process:

- More competition for attention and credibility
- Less time to communicate
- Higher expectations from packaging

This project moved **Al Bronzo** forward, but **packaging strategy is never finished.**

You need to constantly:

Test

Learn

Refine





Q & A

Ask away!

Come have a chat!

Booth #104



Cliff Kane
Senior Director, New
Business Development



Lisa Koster
Senior Director,
Client Service



Jane Nedinovski
Senior Director, New
Business Development



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Senior Director,
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Behavioral Frontrunner

Test More

Move Faster

Spend Smarter

 PackSee.AI

PackSee.AI Score

Attract

Engage

Inform