



# When Icons Evolve:

The Hidden Shelf Dynamics Behind Lay's Bold Packaging Transformation



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# New VIS ID Rooted in REAL



Wood cues farm crates,  
cooking, picnics and  
outdoor times with family

Potato is a hero



Distinctive &  
compelling claims

Easy flavor navigation panel  
also feels like a hand applied  
label

Chip texture and dimension  
have a 3D feeling on shelf

# CONTROLLED STORE TEST APPROACH



## CONTROL STORES

Any store in Knoxville area  
not in store list

ORIGINAL pack only



## TEST STORES

150 stores with NEW  
pack

Circana data collected at  
same time

# WHAT CONSUMERS & SHOPPERS SAY DOES NOT ALWAYS ALIGN WITH WHAT THEY DO!



**SAY**

Relying only on what consumers & shoppers SAY limits understanding of the full story.

- ❌ Limited details shared
- ❌ Risk of inaccuracy/unreliability
- ❌ Rationalizing behaviors
- ❌ No additional context



**DO (BEHAVIORAL)**

Capturing what consumers & shoppers DO through observed behaviors helps tell a clearer story.

- ✅ Less consumer burden to recall
- ✅ Validated by actual, real behavior
- ✅ Observations of natural, irrational behaviors
- ✅ Capturing real world influences



# WHY PACK TESTING AT SHELF MATTERS

## AT SHELF PACK TESTING...

1

Allows real-world retailer and shelving scenarios to play out

2

Enables natural, unprompted consumer commentary to reveal 'whys'

3

Lets shoppers touch and feel physical products

## HOW IT WORKS

Nailbiter finds the right shoppers at the right time to observe their behaviors.

Shoppers make short, in-the-moment videos recording their purchase decision or consumption moment



Videos and audio are converted into metrics and insights

These metrics build powerful brand, category, and retailer stories



# CAPTURING BEHAVIOR VIA VIDEO





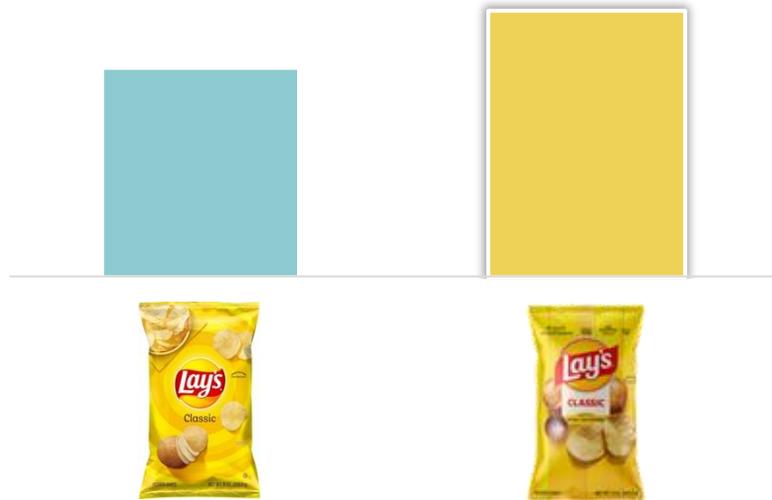
# PACK TESTING IN THE WILD

Real-world retailer and shelving scenarios play out

## Displays were the biggest reason for Notice uptick

### NOTICE BY STORE

■ Control ■ Test



Increase in Notice in Aisle

+ 1.1x

Increase in Notice on Display

+ 4.5x



# UNDERSTANDING THE WHY'S

Sales data gives the 'what', Nailbiter gives the 'why'

## CONVERSION

The new pack sees an uptick in Conversion, driven by all the right reasons

67%



classic  
trusted brand  
simple quality modern real ingredients  
chip flavor  
chip type  
flavorful texture  
color-coordinated  
tasty dipping plain  
eye-catching

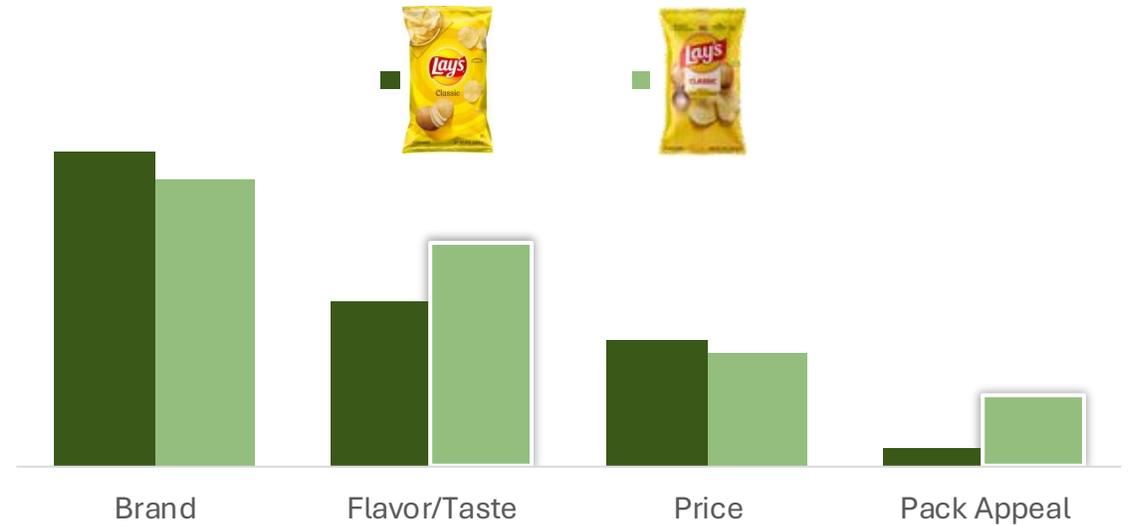
72%



modern appealing since 1938  
color-coordinated  
delicious no artificial flavors  
classic quality flavorful  
real ingredients  
clean eye-catching  
healthier fresh tasty up-to-date premium  
dipping authentic

## REASONS FOR PURCHASE

Enticing ingredient imagery stands out on the new packs driving higher flavor cues.



"I love these packages more because they **look more prestigious**. The **pictures are so tasty**."



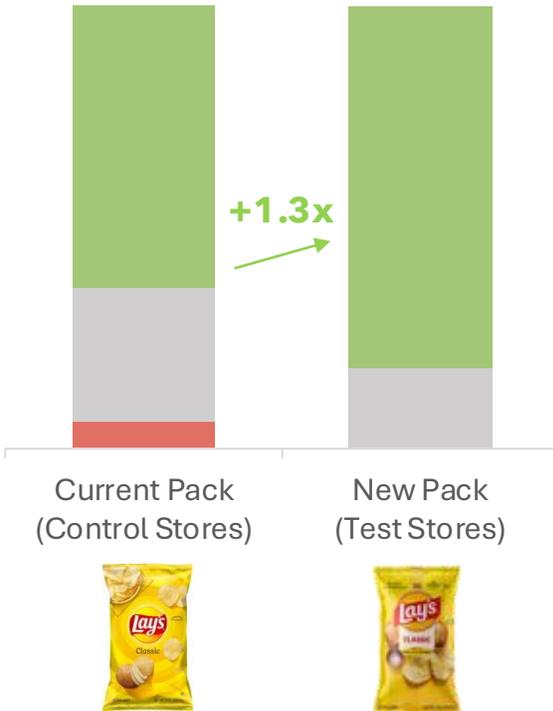
# PACK BEHAVIOR

# OBSERVING PACK BEHAVIOR AT SHELF

Videos allows you to see and hear what shoppers are doing with your pack and how they feel

## PACK PERCEPTIONS

■ Positive ■ Neutral ■ Negative



## ENGAGEMENT WITH THE PACK

New Pack shoppers are **2.1x more likely to turn NEW pack over**



*"Looking at the pack here, it's **potatoes, vegetable oils, skim milk, salt, whey...** I mean, there's some stuff in there, but **nothing artificial about it.**"*  
- Test Shopper

**#1 Claim Called Out on NEW Pack**



**Made with Real Potatoes**



# WHAT WE'VE LEARNED

1



Pack testing in the wild isn't always perfect, but that's the point!

2



Behavioral video revealed unique insights that drove confidence in the team for national launch

3



Testing again after national launch should be a best practice

