

# **Diploma in Packaging Technology**

## **Unit 2 (online)**

### **Packaging Marketing and Design**

© The Irish Packaging Society & IOM3 Training Academy

1

## **6. Packaging and Marketing Learning Outcome and Assessment Criteria**

**Learning Outcome (What you need to know/understand)**

6. Understand the relationship between packaging and marketing

**Assessment Criteria (What you need to do)**

1. Describe the functions of marketing
2. Assess the relationship between packaging and marketing
3. Using a given example explain the impact of packaging on product promotion and advertising

## **Packaging and Marketing Indicative Content**

- Defining marketing and the marketing function
- Basic marketing concepts e.g. the “marketing mix”; “brand”
- Use of market research tools and techniques to identify customer needs
- The relationship between packaging and marketing.
- Branding and the impact of packaging on product promotion and advertising.
- Importance of consistency of communication across brand elements
- The inter-relation between the pack, promotion and advertising in different products
- For a range of different packed products, discuss the inter-relation between the pack and the product’s brand image

© The Irish Packaging Society & IOM3 Training Academy

3

## **Content**

- The Role of Marketing
- Brand & Brand Equity
- The Marketing Mix
- Market Research
- NPD
- New Packaging Design
- Packaging Specifications
- Feedback Form



Copyright Leonard Little & Assoc Ltd.

4#

5

Discussion....

What do companies mean when they talk about marketing?

6

## Marketing definitions

- What is Marketing?
  - 'The management process responsible for identifying, anticipating and satisfying customer requirements profitably'  
CIM
  - 'Marketing is the vehicle through which a company can achieve its short term goals and strategic aims in terms of long term growth and profit in the face of change, particularly competitive change'  
P&G

© The Irish Packaging Society & IOM3 Training Academy

7

7

## New Purchase Why did you buy it?

Think briefly about your own purchasing behaviour. Have you bought a new packaged product recently? Was it a replacement or something completely new to you? What influenced your purchasing decision? Where did you buy the product?

© The Irish Packaging Society & IOM3 Training Academy

8

8

## The Role of Marketing

- An integral part of the business
- Role varies according to company type:
  - Production-led
  - Sales-led
  - Marketing-led

## The Role of Marketing

- Production-led companies:
  - Usually have a core, commodity product
  - May be constrained with regard to product and pack innovation
  - May concentrate on developing a unique service

## The Role of Marketing

- Sales-led companies:
  - Usually make bespoke items to customers' specifications, e.g. printed packaging
  - Need to understand customers' customers
  - Opportunities for both innovation in both product and service

## The Role of Marketing

- Marketing-led companies:
  - FMCG - fast moving consumer goods such as food and drink, toiletries and pharmaceuticals
  - Clothing, textiles, household, garden products
  - Products are usually self-selected by the customer, in supermarkets, stores, or via catalogue or web site

## Discussion.....

So, which category does your organisation fit into?:

- Production-led
- Sales-led
- Marketing-led

13

13

## Discussion

- What are the responsibilities of marketing?

## Marketing Responsibilities

- Includes:
  1. Identify the need for the product or service
  2. Identify the market sector
  3. Determine the price
  4. Determine the distribution strategy
  5. Determine the brand values via the functional and graphic attributes of the pack

© The Irish Packaging Society & IOM3 Training Academy

15

15

## Marketing Responsibilities

1. Identify the need for the product, either existing or new:
  - What is missing?
  - What can be improved?
  - Is there room for me too?

© The Irish Packaging Society & IOM3 Training Academy

16

16

## Marketing Responsibilities

### 2. Identify the market sector:

- Who are they?
  - How many are out there?
  - Where are they?
  - When do they want it?
- 
- Information is gained by *Market Research*

## Marketing Responsibilities

### 3. Determine the price:

- What is the total cost?
- What about development costs?
- What factors affect cost?
- What price will the market pay?

## Marketing Responsibilities

### 4. Determine the strategy for distributing the product:

- Where will it be sold?
- What selling methods?
- What secondary pack size?
- What tertiary pack size?
- What display requirements? How to tell the consumer about the product?
- Advertising media?
- Timescale?

## Marketing Responsibilities

### 5. Determine the brand values via the functional and graphic attributes of the pack

What product and pack attributes will appeal to the market?

So what is a BRAND?

## Exercise: What is a brand?

### Discussion

- A mark of authenticity?
- A guarantee of reliability?
- A promise?

## What is a brand?

- Branding is about the reputation of the company's products and their perceived value. It is a set of intangible values existing in the consumer's mind.

## What is a brand?

- Brand values are emotive and functional
  - are what consumers believe them to be...idea of the company, its product and services....assurance of quality and reliability etc

## Exercise

### **What's your brand?**

Write down a list of brands or companies that you are loyal to, if any. What is it about these companies' products that appeals to you?

Are there any brands or products that you would not consider buying?

Why is this?

## Brand Equity

25

### Exercise: Brand Loyalty & Brand Equity

What is brand equity? .....



(source: R Coles)

26

## What is brand equity?

Brand equity may be defined as the additional value that a consumer attaches with the brand that is unique from all the other brands available on the market. In other words, brand equity means the:

- Awareness
- Perception
- Loyalty of a customer towards that brand

© The Irish Packaging Society & IOM3 Training Academy

27

27

## Brand symbol communication



Shape - unique, exists without graphics  
Colour - specific colour  
Graphic devices  
Logos  
Graphic style - display typefaces

© The Irish Packaging Society & IOM3 Training Academy

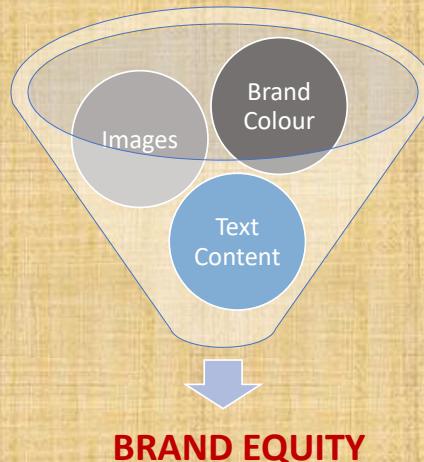
28

28

Why is print quality important?

### Formula

Good colour control + Brand consistency =  
Increased brand equity.



Copyright Leonard Little & Assoc Ltd.

29

29



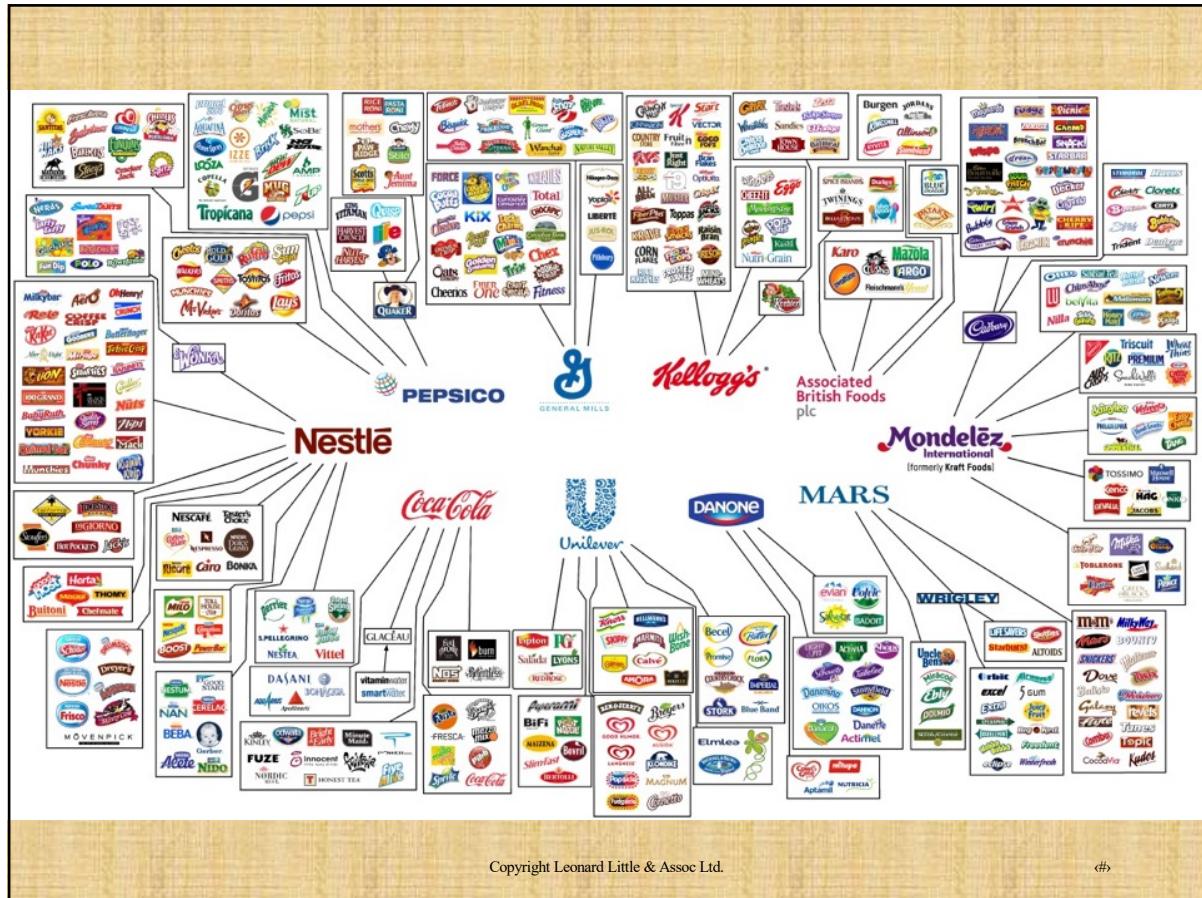
### Equity and Brand names

- Large companies with well known products, build equity in their logos or brand names.
- Often they are a graphic element or icon like McDonald's arches, Kellogg's K, Coca Cola logo / colours / bottle shape, Heinz tomb stone logo etc.
- They have equity or value because people recognise them and associate with them, long before they can read the message.
- They have a motivational impact on the consumer. Equity is built by establishing a reputation for a consistently good product and service, over a long period of time.

Copyright Leonard Little & Assoc Ltd.

29

30



Copyright Leonard Little & Assoc Ltd.

44

31

## Equity and brand names contd.

- Brand names also have equity. Customers associate with them. M&S, Cadburys, Budweiser etc.
- Established brand names are valued and for Coca Cola for instance, may be as valuable as the rest of the company's assets!
  - You can understand therefore why Corporations are so careful about their image, company colour, print results, design etc.
  - Care is taken to protect with trademarks & copyrights.
- Good brand names describe a virtue of the product or invoke some image. You cannot easily make a brand, it has to be earned and developed with large expensive campaigns.
- Many of our leading brands have been around for over 80 years Wrigley, Cadbury, Kodak, Gillette, Lipton, Coca Cola, Kellogg's, Goodyear

Copyright Leonard Little & Assoc Ltd.

45

32

## Brand Differentiation

- A brand differentiates one product from another
- Packaging Design can provide that differentiation



© The Irish Packaging Society & IOM3 Training Academy

33

33

## Brand values

- The tangible and intangible assets of the brand revenue and good will
  - brand identity - total perception
  - brand personality - in human terms, fun, sexy, boring
  - brand positioning - relative to competitors in terms of benefits and promise
  - brand character - in human terms, honesty, integrity
  - brand soul - emotional core
  - brand culture - the culture it represents, Nike

© The Irish Packaging Society & IOM3 Training Academy

34

34

## The elements of a brand

- Coherent
- Unique
- Relevant
- Distinctive
- Must appeal to the market
- Must be protectable

© The Irish Packaging Society & IOM3 Training Academy

35

35

## Exercise: – Identify the brand



<http://studiorokit.com/simplified-branding-how-effective-food-packaging-design-uses-shape-and-colour/>

ing Academy

36

All good packs use a combination of:

**LINE**

A line is a mark between two points. There are various types of lines, from straight to wavy, from thick to thin. Lines can be used for a wide range of purposes: stressing a word or phrase, connecting content in one another, creating patterns and much more.

**SHAPE**

Height + width = shape. We all learned basic shapes in school: squares, rectangles, triangles, circles and rectangles. Bold or lesser even shapes can be used to attract attention.

**COLOR**

Color is used to generate emotions, define importance, create visual interest and more. CMYK (cyan/magenta/yellow/black) is subtractive. RGB (red/green/blue) is additive. Some colors are warm and active, some are cool and passive (blue, purple). There are various color types (primary to analogous) and relationships (monochromatic to triadic) worth learning more about as well.

**TEXTURE**

Texture relates to the surface of an object, material or fluid etc. Concrete has a rough texture; drywall has a smooth and subtle texture. Using texture in design is a great way to add depth and visual interest. Textured surfaces have a real texture texture while screen material has implied texture.

**ELEMENTS OF DESIGN**  
quick reference sheet

**SIZE**

Size is how small or large something is: a small shirt vs. an extra large shirt. For example: Use size to define importance, create visual interest in a design (via contrasting sizes), attract attention and more.

**VALUE**

Value is how light or how dark an area looks. A gradient, shown above, is a great way to visualize value - everything from dark to white, all the shades in-betweens, has a value. Use value to create depth and light; to create a pattern, to lead the eye; or to emphasize.

**SPACE**

Space is the area around or between elements in a design. It can be used to define information. Use it effectively to give the eye a rest, define importance, lead the eye through a design and more.

Copyright Leonard Little & Assoc Ltd. #

37

## Coherence

- Consistency of communication:
  - Across advertising and packaging
  - Across product range
  - Throughout product life
  - And nowadays...

38

38



39

## Uniqueness

- What makes it 'special'?
  - Function?
  - Emotional values?



41

## Relevance

- Relevant to people's needs
    - Importance of identifying the needs:
      - quality
      - reliability
      - excellence of design
  - *'What the customer wants, top of the list, are quality, reliability and excellence of design. Today's and tomorrow's highly discriminating customers are seeking design excellence in products, retail outlets services and communications'*
- CBI Change to Succeed Report*

42

## Distinctiveness

- Must stand out
- Must be recognisable
- Need to balance 'stand out' with reassurance and recognition

© The Irish Packaging Society & IOM3 Training Academy

43

43



© The Irish Packaging Society & IOM3 Training Academy

44

44

## The elements of a brand

- Must combine to differentiate your product from the competition
- Must make the customer want to buy



45

45

## The elements of a brand

- Must deliver 3 fundamental messages:
  - What is this?
  - What is it going to do for me?
  - Who guarantees that?

46

## The elements of a brand

- What is this?
  - Chord of familiarity
  - Need to instantly recognise the product

eg Rice  
Cornflakes  
Alkaline battery

## The elements of a brand

- What is it going to do for me?
  - The point of difference
  - Recognise some benefit when the product is purchased

eg Basmati or Easy Cook Rice  
Crunchy Nut Cornflakes  
Extra Long Life Alkaline Battery

*Without a point of difference, your product is just another pack on the shelf.*

## The elements of a brand

- Who guarantees that?



© The Irish Packaging Society & IOM3 Training Academy

49

49

## The elements of a brand

- The three basic messages are used in various proportions and can be delivered by text, graphics, shape, or colour.
- The weight given to each message and the medium by which the message is delivered should be determined by careful and thorough market research.
- Particular care must be given to keeping the messages consistent in choice of the pack structure, graphic presentation, and advertising message.

© The Irish Packaging Society & IOM3 Training Academy

50

50

## Brand Selection

- Brand selection - why do we buy a brand?
  - Influenced by advertising
  - Standout on shelf
  - Like the product - repeat purchase
  - Trust the quality
  - Meets our lifestyle criteria
  - Value for money

## Brand levels

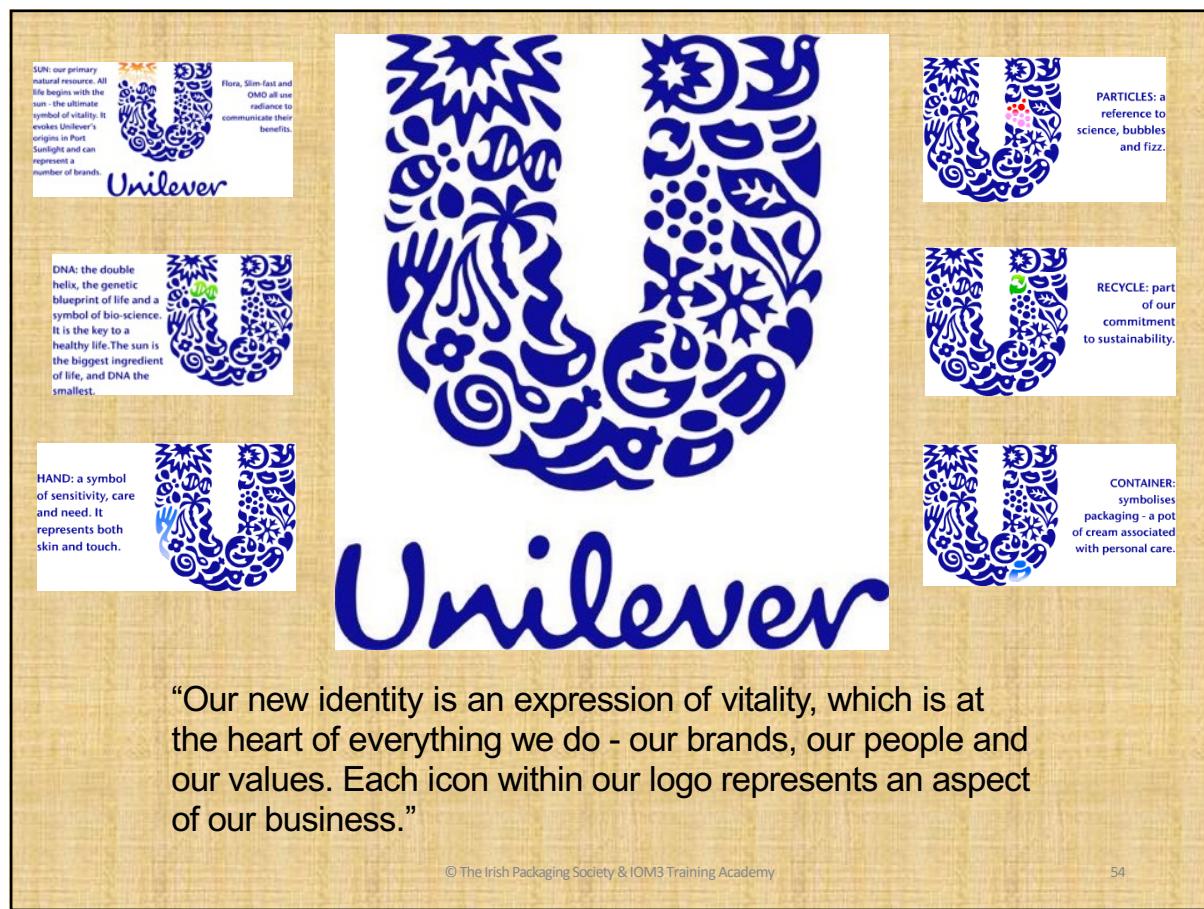
- Umbrella branding - Cadbury, 3M
- Specific brand - Ariel
- Sub-brand - Cadbury's Flake
- Brand endorsement - Obsession by Calvin Klein



© The Irish Packaging Society & IOM3 Training Academy

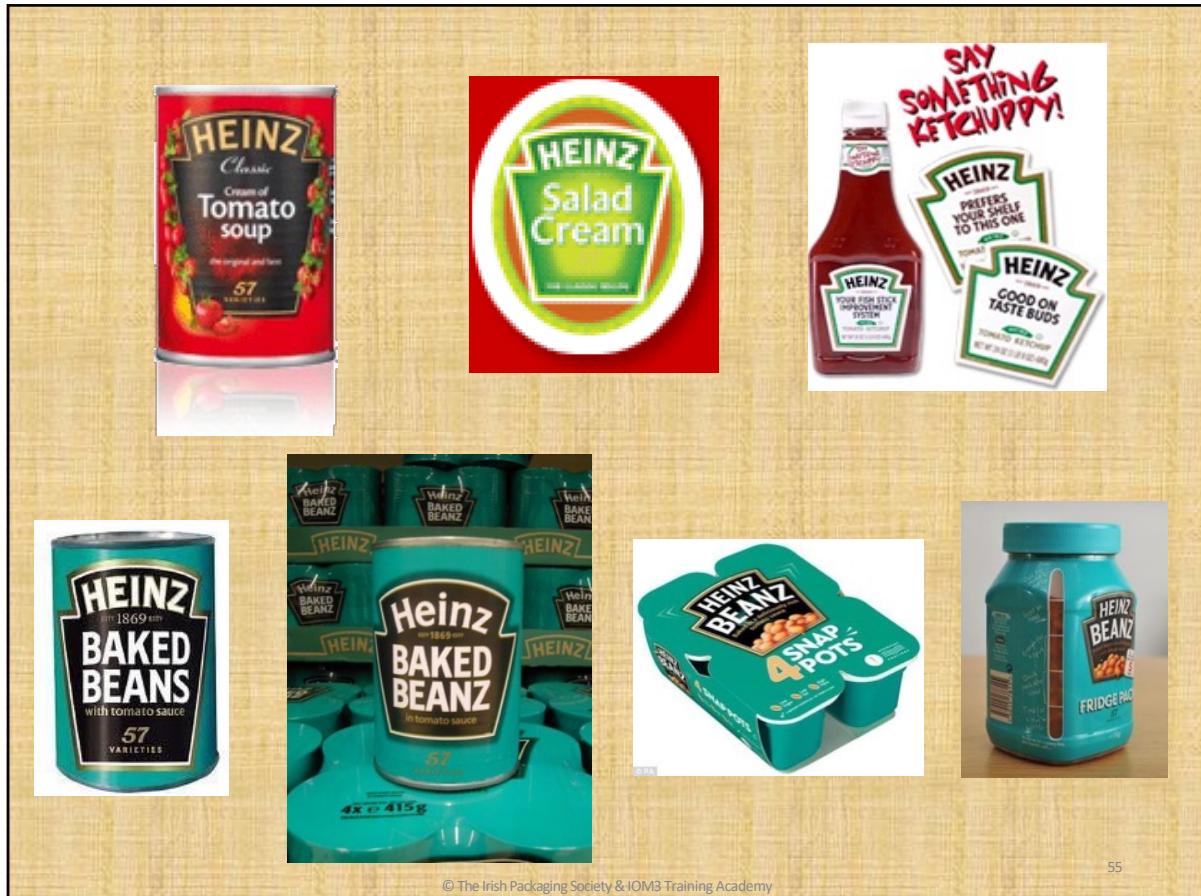
53

53



54

54



55

55



56

56



© The Irish Packaging Society & IOM3 Training Academy

57

New Packaging Graphic Design

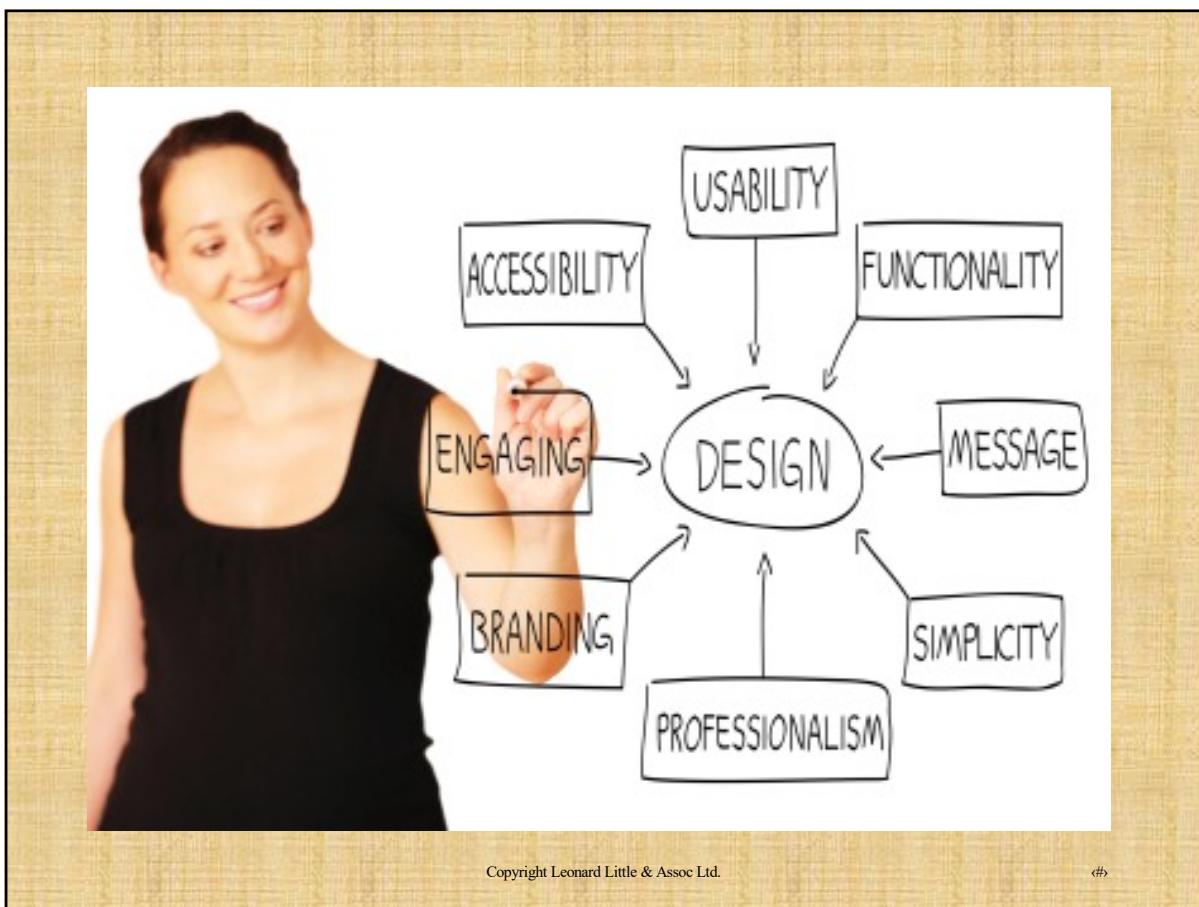
## Pack Design

- Pack design composed of two separate components (features & characteristics)
  - **Technical & Physical**
    - Containment, protection/preservation and qualities required for transport/distribution etc.
  - **Attract, Inform & Influence**
    - Buying decision will depend on the surface decoration, form, material and shape

Copyright Leonard Little & Assoc Ltd.

48

59



Copyright Leonard Little & Assoc Ltd.

49

60



## Graphic Design Basics

### **Design Elements**

fopt page 48

- **Shape** – Outline, illustrations or body text
- **Size** – How large or small, physical or perceptual size
- **Colour** – Attract attention, affect mood, add expense
- **Texture** – Perceived or real. Involves extra sensory additions
- **Tone** – Light or dark, dark appears heavy
- **Line** – Straight, curved, heavy or light, rough or smooth
  - Horizontal=calm, Vertical=dignity, diagonal=vitality, curved=grace
- **Icons** – Symbol that conveys meaning or message

Copyright Leonard Little & Assoc Ltd.

«#»

61

## Packaging Design

- Part of the brand delivery
- Provides a ‘persona’ for the packed product, to appeal to the targeted audience

62

## Balance & Unity

- Each element of a design has an optical weight
- Lightness, darkness, size, shape and colour.
- The designer must recognise these and find a balance

- The following elements contribute to a pack's balance
  - Symmetrical or formal balance
  - Asymmetrical or informal balance
  - Weight distributed correctly vertically
  - Unity created by a theme or mood
  - Elements must tie together in a sense of harmony
  - White space is potentially a 'negative', too much weakens the design
  - Elements must combine to create a persona which matches the psychographic / demographic of the target customers.

Copyright Leonard Little & Assoc Ltd.

4#

63

## Direction & Dominance

50 Chapter Three

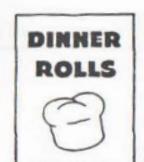


Figure 3.1  
Examples of poor (left pair) and preferred (right pair) graphic organisation. (Source: A. Kner.)

- People see things in a set order. In the West we see top to bottom, left to right, black to white, colour to no colour.
- Good design organisation can lead the eye from one element to the another.
- Packs must be kept simple with a dominant element that stands out from the rest.
- Note examples above from foft p49 & 50.

Copyright Leonard Little & Assoc Ltd.

4#

64

## Proportions

- Length to width proportions of 2:3 or 3:5 are most pleasing while 1:1 or 1:2 are considered visually boring

### •Typography

- Must match the persona of the product
- Dominant typography must be legible from several feet
- A significant proportion of the population are functionally illiterate or do not use their glasses for shopping
- Too many typefaces can spoil the harmony
- Reverse type can be difficult to read or can fill in.
- Avoid type over illustrations or areas of poor contrast
- Avoid long stretches of small type or hyphenation
- Bullet point or numbers improve legibility
- Don't use bold faces or boxes or colour highlights with large amounts of type

Copyright Leonard Little & Assoc Ltd.

48

65

## Product should be test viewed on display

Graphic Design 51

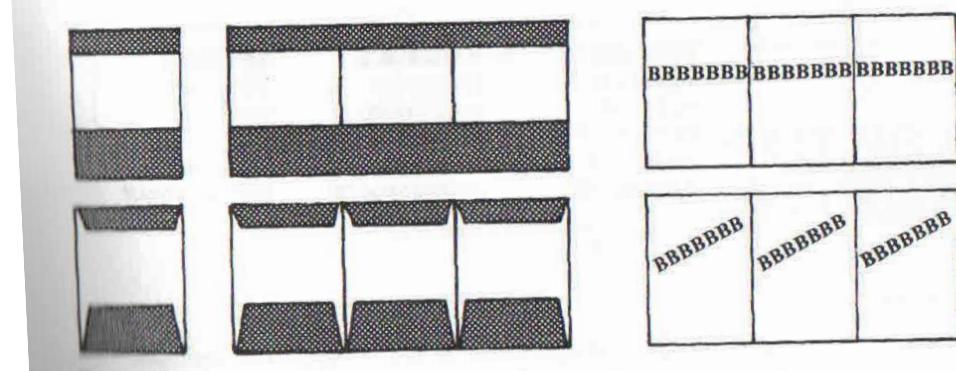


Figure 3.2  
Design concepts should always be envisioned as they will be displayed.

Copyright Leonard Little & Assoc Ltd.

49

66

- See page diagrams on foft p 50,51,52
- Examples of poor layout
- Concepts shown as displayed
- Serif and sans serif
- Appropriate font examples
- Typography used to communicate more than just the word
- Pack style should be considered with the text layout i.e. seams, creases etc.

Copyright Leonard Little & Assoc Ltd.

4#

67

## Colour



- Colour is the first thing recognised before shape, graphics and text. Therefore colour is the most important motivator of a purchasing decision.
- Colour evokes an emotional response from the observer. Associated with moods, feelings, places and things. Colours can be used to describe emotions see Red, green with envy, warm colours cool colours etc.
- Colour can influence perception such as size, quality, value, flavour. So packaging design is therefore crucial in creating impression.
- Colour can have ethnic and social associations e.g. red green white - Italian, Green and orange – Indian food or flavours.
- Some colours dominate supermarkets like reds browns and blues while for instance purple is mostly absent.

Copyright Leonard Little & Assoc Ltd.

4#

68

## Colour Quality

Why is it important to specify and manage colour?

Let's look at some poor examples.

Copyright Leonard Little & Assoc Ltd.

69

69

Pictures of poor colour management



70

70

Recognizable brand colours – (sometimes onomatopoeic)



© The Irish Packaging Society & IOM3 Training Academy

71

71



© The Irish Packaging Society & IOM3 Training Academy

72

72

## Size & Shape

- Size & Shape
  - unique, exists without graphics



© The Irish Packaging Society & IOM3 Training Academy

73

## Texture

- Texture - allows for consumer delight and product recognition.



© The Irish Packaging Society & IOM3 Training Academy

74

74



## Lucozade aids recovery...

Taking a traditional brand and repositioning it into a growing sports/ youth market.

© The Irish Packaging Society & IOM3 Training Academy

75

75

Customers ideally develop loyalty to a brand and get used to a look or design and then select it without thinking, 'kinda on autopilot....'

## See TROPICANA case study



What  
happened  
next ?

76

## Relationship or preconceptions

Relationships with or preconceptions of the product also are part of the motivational puzzle.

- Perceived quality, Impulse item, preferred purchase unit, seasonal purchase, durable good, gift item, staple item.

### How the product is used or special features

- Easy opening, reusable, reclose feature, portion pack, attractiveness level, environmental status, disposal method, dispensers, storage method, special features, instructions, returnable package.

### Analyse the competition

- Target Market, strengths, unit size, pack type, marketing strategy, market share, weaknesses, sales volumes, pricing structure.
- Perhaps better to compete in a niche market for 90% than have to fight against a dominant player and brand leader with customer loyalty, for a high risk 2% market share.

Copyright Leonard Little & Assoc Ltd.

«#»

77

## The Retail Environment

- Once the customer is in the store the only medium left to convince the customer is **the packaging**
- How does the designer convince the customer to buy their pack over the competitor packs.
- Depending on the source and the product category between **68%-80% of the buying decision is made in the store** while the customer is facing the product shelf.
- The customer often depends on impulse buys and scans the shelf and focusses on product for **about 7 seconds**. In this time, it must convey the message that motivates the purchasing decision.
- Brand loyalty in recessionary times make the 'economy pack' choice as good as, or equal to the recognised leader.
- Bar codes (in the future RFID / 3D etc.), EPOS systems and loyalty schemes give enormous power to the retailers and the merchandisers. They can now accurately analyse purchasing trends and habits and tell suppliers what is needed rather than accepting what is offered.

Copyright Leonard Little & Assoc Ltd.

«#»

78

# The Marketing Mix

79

## The marketing mix

- The role of packaging in the marketing mix:
  - Graphics, including logo or brand name
  - Colour
  - Size
  - Shape
  - Texture

80

## The Marketing Mix

- The 4 'P's of marketing

- Product

4P's explained Animated  
<https://youtu.be/JlirzTdaey4>

- Price

4 P's explained in-person  
<https://youtu.be/wX0SGMrZpOg>

- Promotion

- Place

© The Irish Packaging Society & IOM3 Training Academy

81

81



82

## The 4 'P's of marketing

### • Product

- First impression gained of product is its packaging
  - Contain, protect/preserve, convenience functions
- Packaging maybe an integral part of product e.g. mascara

## The 4 'P's of marketing

### • Price

- Determined by the position required for the brand
- Consider all costs
  - Materials, development, tooling, artwork etc

## The 4 'P's of marketing

### • **Promotion**

- How to recognise and encouragement to buy
- Promotional activity
  - coupons, money off, added value
  - Packaging is often the major vehicle.
- Range extensions
  - Increases shelf impact

## The 4<sup>th</sup> 'P's of marketing

### • **Place**

- Where sold
- Method of distribution

# Marketing Mix

## Product

- Customer want or need?
- How will the customer use?
- Where will the customer use?
- Different from competitors?
- Will the customer become loyal?
- Customer service follow-up?



## Price

- Examine the cost to create?
- Competitors pricing?
- Perceived value of your product?
- Adjust pricing over time?



## Place

- Who & where are your customers?
- User experience either in-store or online?
- Customer expectations?
- Distribution strategy versus competitors?



## Promotion

- Which platforms?
- Budget for paid ads?
- Where are your competitors promoting?
- Best time to reach customers?
- Engage on social media?



87

Also, other 'P' factors

- **Process:** complexity of purchasing
- **Physical evidence:** e.g. evidence of branded interface for digital service
- **Properties:** aesthetics and environmental

88

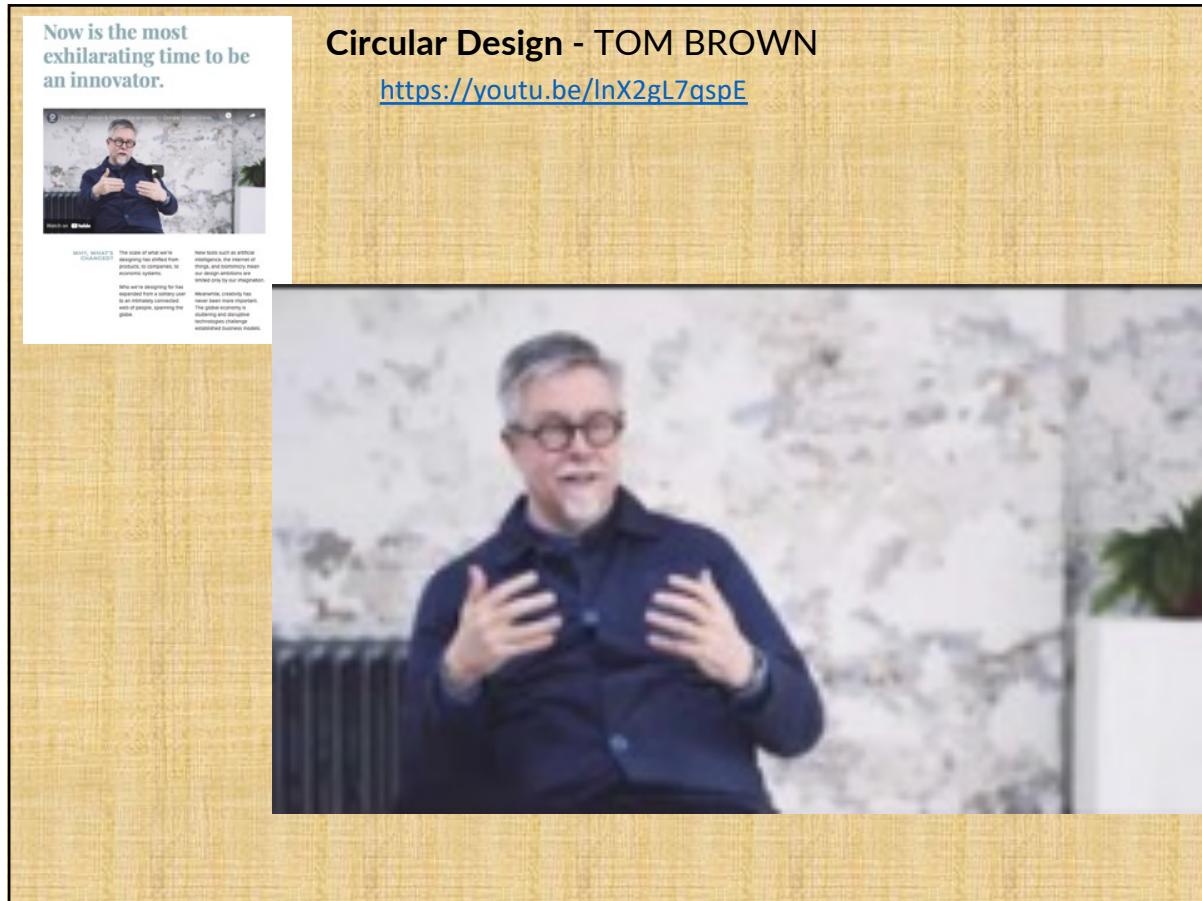
## Other 'P' factors cont'd.

- **People:** salespeople understand the product and benefits; aftersales service and support e.g. training.
- **Pleasure:** added value for enhanced brand engagement – source of competitive edge.

## We also need to include Circular thinking

Where do you think sustainability fits into the marketing mix?

- Brands historically judged their success by the numbers.
- Now we need to show we have a larger purpose.
- Think ahead. Sustainability is all about building long-term value.
- Be customer-oriented.
- Reflect sustainability and circularity in every aspect of your brand and business.
- You will be judged...and 'green washers' will be held to account!



91



92

## Market Research

93

## Market Research

- Getting the right persona:
  - Need to carry out Market Research:
    - Demographics
    - Psychographics

94

## Market research

- Demographics
  - split the population into categories by:
    - Gender
    - Occupation
    - Socio-economic status
    - Family size
    - Marital status
    - Age
    - Education
    - Geographical location
    - Residence
    - Educational level
    - Religion
    - Ethnic groups

## Demographics

- Designers need to understand the product, know the target market and the consumption habits and motivation of that group

### • Demographics

- Demographics is the numerical count of how many people fall into easily quantifiable classifications e.g. Gender, occupation, cultural background, marital status, family size, education level etc.
- Need to anticipate tomorrow's market and trends i.e. population ageing, smaller families etc.
- Doesn't give you all the answers and is too general for each category. (Not all 26 yo females are interested in... or motivated by ...)

## Psychographics

- Psychographics is the study of how groups of people are motivated and how they behave.
- It is an imprecise study. Groups like 'yuppies' 'Sloans', 'yummy mummies' or 'soccer moms' are casual titles given to groups that have real or imagined characteristic behaviours.
- The objective is to discover the purchasing preference or need of a significant consumer block, to identify behavioural patterns, that may help in the design of a pack that will appeal to that specific group.
- See the GPMC study page 40 Fopt re: behavioural patterns in terms of eating and nutrition.
- Marketeers have other classification such as NRS (national readership survey)

Copyright Leonard Little & Assoc Ltd.

«#»

97

## Psychographics

- **Lifestyle - social & cultural influences**
  - Location - city, country, region
  - Family - nuclear, dispersed, extended
  - Work - unemployed, women in work
  - Travel - experience of cultural difference
  - Music
  - Art & design
  - Fashion
  - Media
  - Cults/groups/clans
  - Imported values

98

## The NRS social grades

The classifications are based on the occupation of the head of the household.<sup>[1]</sup>

Grade	Social class	Chief income earner's occupation
A	<u>upper middle class</u>	Higher managerial, administrative or professional
B	<u>middle class</u>	Intermediate managerial, administrative or professional
C1	<u>lower middle class</u>	Supervisory or clerical and junior managerial, administrative or professional
C2	<u>skilled working class</u>	Skilled manual workers
D	<u>working class</u>	Semi and unskilled manual workers
E	Those at the lowest levels of subsistence	Casual or lowest grade workers, pensioners and others who depend on the welfare state for their income

The grades are often grouped into ABC1 and C2DE and these are taken to equate to middle class and working class respectively. Only around 2% of the UK population is identified as upper class,<sup>[2]</sup> and this group is not included in the classification scheme.

Copyright Leonard Little & Assoc Ltd.

48

99

## Niche markets – e.g. Male 50 somethings

Hidden hippy	Design guru	Clean & green	Happy hobbyist
pony tail	Hugo Boss	organic	internet
beer	Muji	VW polo	models
denim	ck1	dogs	old cars
motorbikes	BMW/Merc	bikes	barn building
Eric Clapton	Gitane	plonk	pottery
roll-ups	vodka	allotments	homebrew

100

## Market research

- Identify the need
- Does the proposed offering meet that need?
  - Does it work?
  - Do they like it?
  - Would they buy it?

## Market Research

- Does the target consumer recognise the offering?
  - Does it stand out?
  - Is the product clearly identified?
  - Does it present the expected image?

## Market Research

- Market research is essential to:
  - Avoid unnecessary cost
  - Reduce chance of failure
  - Most new product launches fail!

## Advertising

- Part of the marketing strategy
- Must deliver consistent message
- Wide range of advertising media available
- Use of the pack as advertising

## Marketing and Brand Websites

- [www.landor.com](http://www.landor.com) • Useful directory of terms
- [www.interbrand.com](http://www.interbrand.com) • Branding specialists
- [www.packaginginfo.com](http://www.packaginginfo.com) • World brand positions
- [www.futurebrand.com](http://www.futurebrand.com) • Brand specialists
- [www.mckinsey.com](http://www.mckinsey.com) • Strategic marketing specialists
- [www.marketingmagazine.co.uk](http://www.marketingmagazine.co.uk) • magazine
- [www.learnmarketing.net](http://www.learnmarketing.net) • Information on marketing
- [www.cim.co.uk](http://www.cim.co.uk) • Chartered Institute of Marketing

© The Irish Packaging Society & IOM3 Training Academy

105

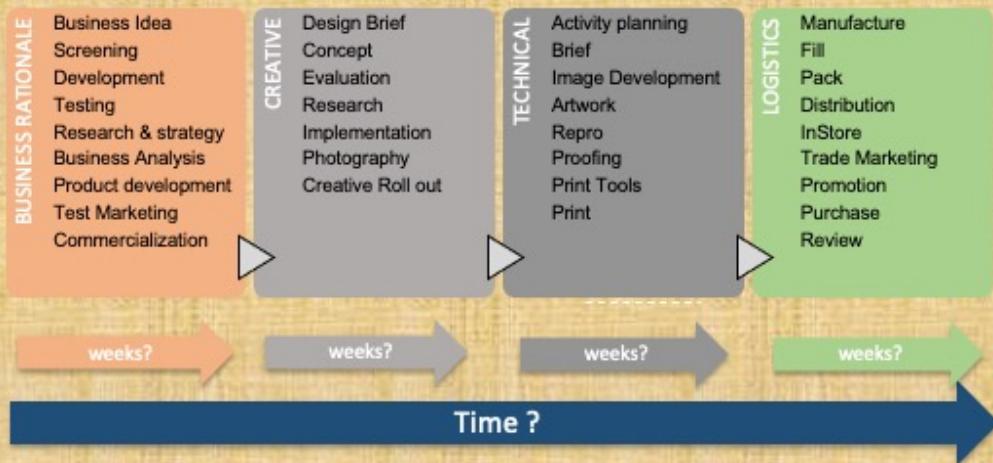
105

## NPD Process

106

## New Product Development Timescales

### Complexity, Process and Time



What are the typical timelines in your organisation?

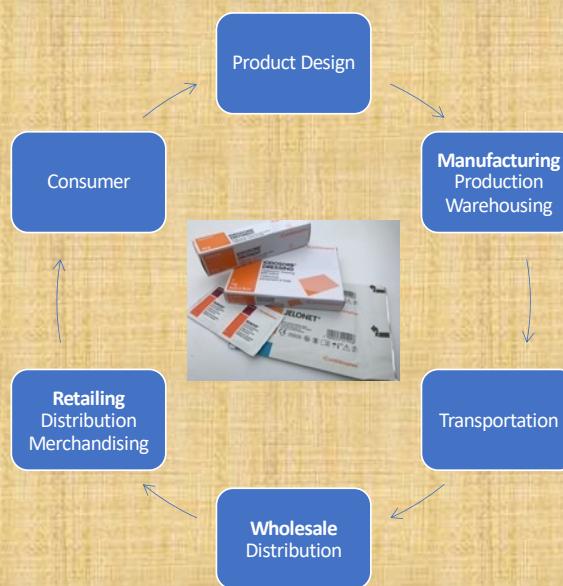
Also consider machine & material lead-times

Copyright Leonard Little & Assoc Ltd.

48

107

## Stakeholder Design Inputs



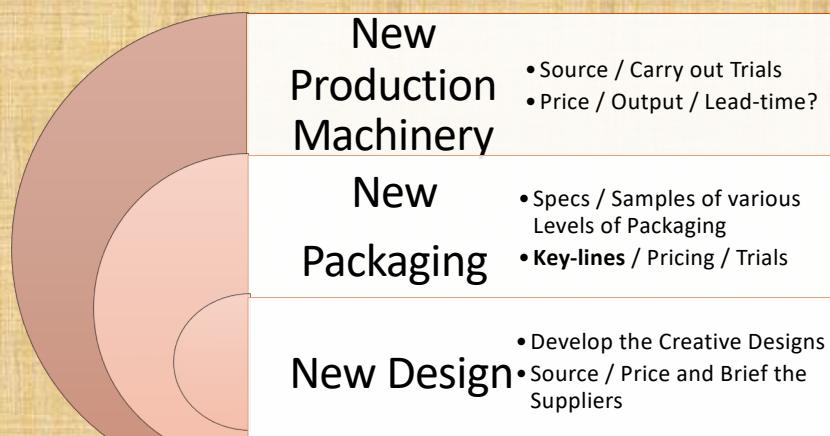
Copyright Leonard Little & Assoc Ltd.

108

108

## Planning is required in parallel

(all inter-linked)



Copyright Leonard Little & Assoc Ltd.

109

109

## Developing the Design Brief

- First stage in the design process
- Sets out what is required
- Brings together the product, the package and the consumer
- Communicates with the designer
- Requires input from Packaging

110

## New Packaging Development - Process Steps

1. Define the objectives & constraints
2. Develop the packaging brief
3. Develop a range of solutions
4. Acquire samples for pack/line testing
5. Finalise specifications
6. Sign off the process

Copyright Leonard Little & Assoc Ltd.

111

111

## Pack Copy Content

- Graphics
  - Transparencies
  - Colour prints
  - Colour paintings
  - Digital files
- What information?
  - Legal
  - Marketing
  - Usage
  - Bar code
- Location on finished pack
- Formal approval process

Copyright Leonard Little & Assoc Ltd.

112

112

## Design brief / Repro Brief / Print specification

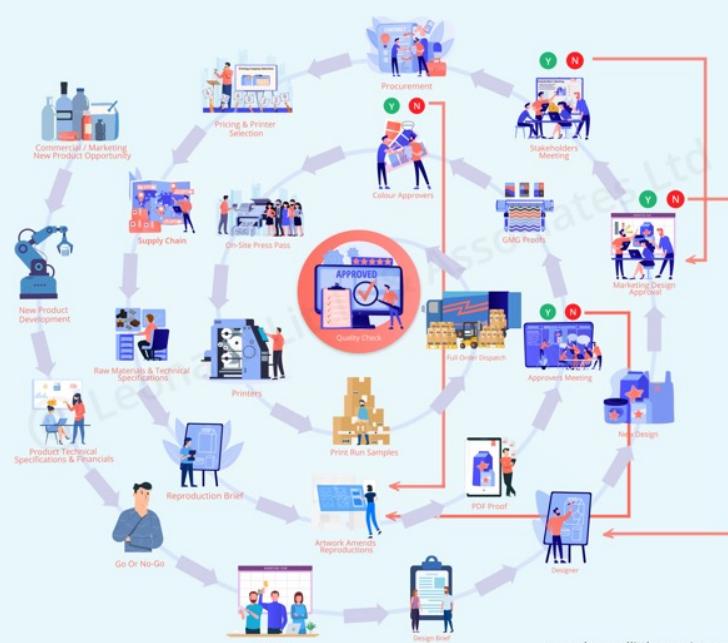
- Size of job – cutter drawing
- Substrate
- Number of inks and varnishes
- Barcode number and spec
- Cylinder size
- Direction of print
- Bleed amount
- Screen ruling, type of screen, screen angles
- Is the job stepped
- Registration marks – centre marks, micro dots, step wedges, tracker lines
- Type of proof – Cromalin, Inkjet, Canon, Digital Cromalin
- Digital files required (what format)
- Plates required – type and no. of plates
- Any special instructions
- Delivery date

Copyright Leonard Little & Assoc Ltd.

113

113

### TYPICAL PACKER / FILLER NEW PACKAGING OR NEW DESIGN DEVELOPMENT PROCESS FOR A LARGE ORGANISATION



Some of you may be familiar with this process, even working in it, but others won't be so familiar...

If you are going to be involved with pack change then it does have to be clear for all involved.

Knowing the process, can save frustration, with the speed of certain stages.

114

## PHASE 1: NEW PRODUCT IDEATION & RATIONAL



The germ of an idea, gets analysed, priced and discussed / agreed to develop further or not.

[www.leonardlittleassociates.com](http://www.leonardlittleassociates.com)

115

## PHASE 2: CREATIVE CONCEPT AND DESIGN DEVELOPMENT



Marketing take the lead and draft a design brief with the required content and overall goal, for the creative team to base their new design upon. A good brief at this stage saves time.

[www.leonardlittleassociates.com](http://www.leonardlittleassociates.com)

116

## PHASE 3: STAKEHOLDER BUY-IN / APPROVAL



117

## PHASE 4: PROCUREMENT AND PRINTER SELECTION



Generally the Printer Selection is separated from Supply Chain and handled by Procurement. Of course if a tender has taken place and has been awarded, the Printer will know and be placed for the lifetime of that tender. New products may require different print technology, in which case the above is typically followed.

[www.leonardlittleassociates.com](http://www.leonardlittleassociates.com)

118

## PHASE 5: THE SECOND APPROVAL



At this stage it is all about getting the colour and brand consistency right. The files / proof get signed off for colour, textual content and position, unwind direction etc. Once signed off, it is supplied to the Printer.

[www.leonardlittleassociates.com](http://www.leonardlittleassociates.com)

119

## PHASE 6: THE PRODUCTION RUN



It can be difficult to attend press passes, but they are useful. At this stage the plates have been produced, the job is run, quality inspected and delivered. Goods-in checks are essential to ensure that the packaging that has been delivered, is fit for purpose. Not checking it and finding out there is an issue just before a planned Packer / Filler production run, is very costly and frustrating.

[www.leonardlittleassociates.com](http://www.leonardlittleassociates.com)

120

# Specifying Packaging

Copyright Leonard Little & Assoc Ltd.

121

121

## Specifying printed packaging

- Specify
  - Colours
  - Performance requirements
  - Pack dimensions
  -
- Consider appearance of pack when made up
- Set standards of acceptability
  - Colours
  - Print quality
  - Copy accuracy

Copyright Leonard Little & Assoc Ltd.

122

122

## Specifying printed packaging

- Performance requirements
  - Print adhesion:
    - Substrate surface smoothness
    - Substrate surface polarity
  - Rub resistance
    - Print to print
    - Print to other surfaces, e.g. inside of corrugated cases
  - Product resistance
    - Test print in extended contact with product
    - Test over range of typical usage conditions

Copyright Leonard Little & Assoc Ltd.

123

123

## Specifying printed packaging

- Odour
  - Check underlying odour of substrate
  - Check printed and varnished samples
  - Organoleptic testing
  - Gas chromatography testing
- Colour fastness to expect light conditions
- Coefficient of friction for machine performance and handling

Copyright Leonard Little & Assoc Ltd.

124

124

## Example Spec content for purchasing a carton.

- **Example**

- **Details on a Customer Purchasing Specification for a typical Carton**

- **Customer name and address**

- **Description / Construction**

- Carton for Product Name
    - Define the general style of the carton eg reverse tuck end and glued carton.
    - Define outline drawing reference
    - Define any special features eg slit locks, windows, thumbnail cut outs
    - Define make up ie glued or flat blanks
    - Define right or left hand opening
    - Unique Code/Ref no. (a code that refers specifically to the item)

- **Material**

- Define the type or grade of cartonboard either by a generic description Eg White lined folding box board or by naming a specific board eg 'Iggesund Incarda silk' or 'Stora Enso Barcelona'

- Define calliper of undecorated cartonboard with default tolerances.
    - Define grain direction (Default direction is usually at right angles to the glued edge)

- **Dimensions**

- Define the three major dimensions in mm (inc tolerances) in order Width, Depth and Height, where Width is the dimension parallel to the longer edge at opening and Depth is the dimension parallel to the other (shorter) edge at opening. Dimensions are measured from middle of crease to middle of crease

Copyright Leonard Little & Assoc Ltd. 125

125

### • **Decoration**

- Define method of printing or decoration eg. litho, flexo, silkscreen, digital.

Include

- Artwork reference (s)

- Bar code: type, number, size and print details

- Proof references with approval date

- Colour targets

- Name and grade of blocking foil

- Edgemark (marks printed on crease for visual identification of rogue cartons)

- Define varnish

- Varnish pattern unless overall varnish is required

- Define Slip Value - if required

- Type of varnish eg High gloss varnish, UV

varnish, Matt varnish etc.

**Performance requirements** (inc. test methods and standards of acceptability)

- Fastness to light

- Product resistance of printed and coated surfaces

- Resistance to rub and scuff

- Bar code inspection procedure

- Slip test

• Production line performance - define line and expected line speed

126

**Delivery format**

- Define preferred delivery format for glued and flat blanks. Number per outer / tray. The number should be such that no undue pressure is placed on the cartons in any direction. Cartons should be stored vertically on creased edge with edge mark uppermost (if present)
- Blanks should be packed flat in lots of approx 100 with layer pads. Care should be made to ensure boards do not warp.

**Identification and Palletisation**

- Each outer should have an identification label including
- Customer
- Item name
- Item refn.
- Quantity per outer
- Suppliers name, batch / identification details
- Date of manufacture
- Define pallet type and method of keeping outers clean and dry e.g. stretch wrapped.

**Basis of Acceptance** (e.g. certificate of conformity)**Other**

•(Use this space to give details of any special requirements such as sampling procedures, special circumstances for trial materials etc)

**Signatures / Dates / Revisions**

- Compiled by and date
- Authorised by and date
- Revision number and date

Copyright Leonard Little & Assoc Ltd.

127

127

## Specifications

Example spec  
for SWS  
flexible film

<b>Specification No.</b>	<b>Issue</b>	<b>Format</b>	<b>Date</b>	<b>Form No:</b>
RM	SWS	SWS or Laminate	Creation or Amend	Rev.0 Issue date: 280817
<b>Bag Part No.</b>		<b>Product Code</b>	<b>Owner</b>	
(Catalogue No.)		The Owner is the creator or last amender.		
<b>Brand</b>	<b>Product</b>		<b>Size</b>	
	13 digit EAN Barcode		Litre	
<b>Material</b>	<b>Thickness</b>	<b>Integrated Handle</b>		
LDPE...		Yes / No		
Specify White/Black or White/White/Laminated...list layers, outside to in.		Calliper	(Produced on T2 machine)	
<b>Web Width (mm)</b>		<b>Repeat Length (mm)</b>		
<b>Total Col.</b>	<b>Process Colours</b>	<b>Special Colours</b>	<b>Lacquer</b>	
Inc. Lacquer	(Usually CMYK)	List Pantone references	List type	
Drag and drop Legend showing colours				
<b>Unwind Number</b>	<b>Unwind Visual</b>	<b>Packed Product Palletisation</b>		
No.	Select insert>picture unwind chart here	XXX		

Copyright Leonard Little & Assoc Ltd.

128

128

Raw Material Packaging Specification

Select Insert>Picture PDF visual of the design here.

**Packing Requirements**

Core ID	Min ID 75mm
Cores plastic or cardboard	
Pallet Dims	1200 x 1000mm
Pallet Height	1300mm max
Units /metres per reel	See Reel OD
Reel OD	500mm ( $\pm$ 15mm) Min 350mm
Reel Weight	See Reel OD
Reels per pallet	4 max
Reels position on pallet	Horizontal

**Material Characteristics**

Average thickness	$\pm$ 5%
Microns	
Spot to spot thickness	$\pm$ 12%
Tensile Strength (MD/TD) MPa	>17/>18 (60mm wide samples)
Dart drop test	- Body $\geq$ 3.4g/mu
ASTM D1709	- Edge-fold $\geq$ 1.8g/mu
Elongation at Break (MD/ CD)%	>450% (10 x100mm sample)
COF -Dynamic - ISO 8295	20.30
Seal Strength	-Tensile 75kg/sq.cm
-Elongation	175%
Sealing Range (at 16 psi/1 sec)	130-170 Centigrade
Opacity (Contrast ratio - tile) $\pm$ 5%	75% White/White
Material UV inhibitor	>130kLy (N. EU)
Corona treatment	>38 dines

**Size**

Web Width mm	-0 / +5mm
Repeating Length mm	$\pm$ 5mm
Print Position	
Side to side	$\pm$ 3mm
Top to bottom	$\pm$ 6mm
One thin max per reel	Use coloured tape and flag join
Reel winding	Flush with cores
Reels tension	Suitable & consistent

**Inks, UV & Lacquers**

Pigments Light Fast inks -	$\geq$ 6 Full tone
- Blue Wool Scale	$\geq$ 5 Half tone
Lacquer	Min. Polyamide Based Testing required
Approved Lacquers 1)	<del>████████</del> Lacquer
2)	
3)	
4)	

**PEC SWS - W/W ,W/B**

PEC SWS - W/W ,W/B	50 x 10mm Black
PEC -SWS Laminated	40 x 10mm Black

**L\*a\*b\* CIE2000**

L*a*b* CIE2000	Delta E 3
----------------	-----------

**Delivery address**

Delivery address	Specified on PO
------------------	-----------------

Copyright Leonard Little & Assoc Ltd.

2

**Benefits Warehouse Utilisation**

- Material Performance Requirements
- Print Samples required
- Print Quality
- Ink & Coatings
- Colour Control & Stability
- Traceability
- Labeling & Warehousing
- Printer Agreement
- Penalties

129

## Good Warehouse Utilisation

(comes from a good specification)

**Before**




**After**




Copyright Leonard Little & Assoc Ltd.

130

Thank you for your time.

*Please now complete the feedback form.*