

MINTEL


 **Dragonfly AI**

Winning the Attention Game

Inside the Hall of Fame, what the top 1% reveal about world-class packaging design

Excellent 

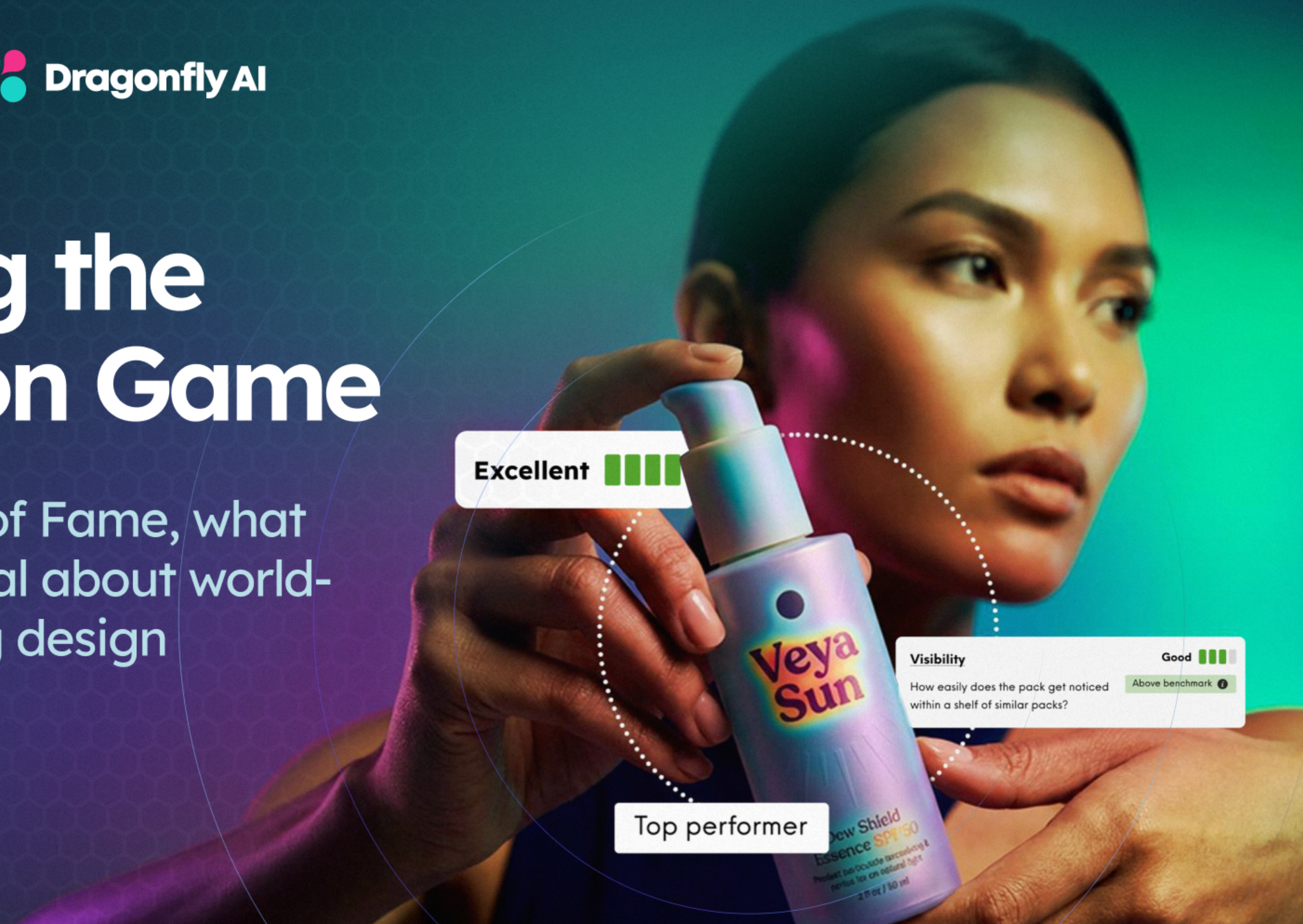
Visibility **Good** 

How easily does the pack get noticed within a shelf of similar packs? Above benchmark 

Top performer

Veya Sun

Ultraviolet Shield
Essence SPF 50
Protects skin outside tanning bed &
reduces tan on natural light
2 fl oz / 60 ml



FOREWORD



Ben Punchard

Global packaging
principal strategist,
Mintel

In today's retail environment, standing out on shelf has never been more challenging, or more critical. Alongside the cost-of-living crisis weighing heavily on households, time-poor shoppers are making faster decisions under pressure, scanning shelves rather than browsing them. In this context, packaging must work harder than ever before.

Where once a bold colour or striking graphic might have been enough to disrupt and capture attention, today's consumers demand more. Visibility is only the starting point. Packaging must now communicate instantly and intuitively. As a result, it has evolved from a passive branding tool into an active decision-making interface. It must attract, inform, reassure, and perform, and do all of this within a matter of seconds.

At Mintel, innovation sits at the heart of what we do. To help brands navigate the growing challenge of standing out on shelf, we have integrated Dragonfly AI into our Global New Products Database (GNPD), offering a new way to assess packaging performance through the lens of human attention.

Grounded in visual neuroscience, Dragonfly AI's biologically inspired algorithm helps predict where shoppers are most likely to look when they encounter a product in-store.

In this whitepaper, Mintel and Dragonfly AI combine market intelligence and attention insight to explore how packaging captures attention in practice – and what brands can learn from the approaches winning the attention game across categories.

THE STUDY

Shoppers decide in under a second. So which packs win that moment?

In a typical store aisle, shoppers spend less than a second looking at each product. In that window – a fraction of the time it takes to blink – the packaging must win attention, communicate brand, and make the case for purchase.

To understand what separates the packs that succeed from those that fail, Dragonfly AI scored every product in Mintel's GNPD database using a patented, neuroscience-based algorithm developed at Queen Mary University of London. They did this by analysing each pack to decide which packs have the highest Attention score based on the pack's visibility, clarity and digestibility.

WHAT IS THE ATTENTION SCORE

The Attention score is a composite **0-100% metric** that measures how effectively a pack commands shopper attention – weighted 50% on Visibility (stand-out on shelf), 25% on Clarity (how quickly the message lands), and 25% on Digestibility (ease of processing).



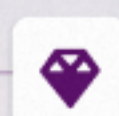
Visibility

How easily does the pack get noticed within a shelf of similar packs?



Digestibility

Is the key information easy to read and understand?



Clarity

Is attention focused or spread out in many areas?

WHAT WE'VE ANALYSED

83

Markets covered – from Ethiopia to South Korea to France

49

Categories, each with its own subcategory benchmark

290

Subcategories

KEY TAKEAWAYS

BOOK A 30-MINUTE SESSION WITH DRAGONFLY AI >>

Scale of consistency – the brands that win don't just have one great pack, they have dozens. Their Hall of Fame presence is a portfolio-wide pattern, not a one-off.

Distinctive brand assets applied at every touchpoint – this includes elements like colour, typography, logo placement and pack architecture that are instantly recognisable across subcategories and markets.

Clarity above everything – the single biggest differentiator between Hall of Fame and the rest is the clarity of packs. These brands communicate one message, fast.

Global reach, local execution – the five brands with the most Hall of Fame products operate across many markets, yet their core visual identity travels without dilution.

Multi-category presence – each brand spans multiple subcategories (skincare, haircare, body care, etc.) while maintaining a unified shelf language.

Decades of brand equity – none of the Hall of Fame products belong to challenger brands. The packaging encodes years of consumer familiarity, which compounds visibility.

Simple, uncluttered pack architecture – high Dragonfly AI Digestibility scores reflect designs that don't ask the shopper to work. Hierarchy is clear, noise is minimal.

The brands that are winning treat packaging as an asset, not just a container – the pack is doing active marketing work, not just identifying the product.

SECTION 01

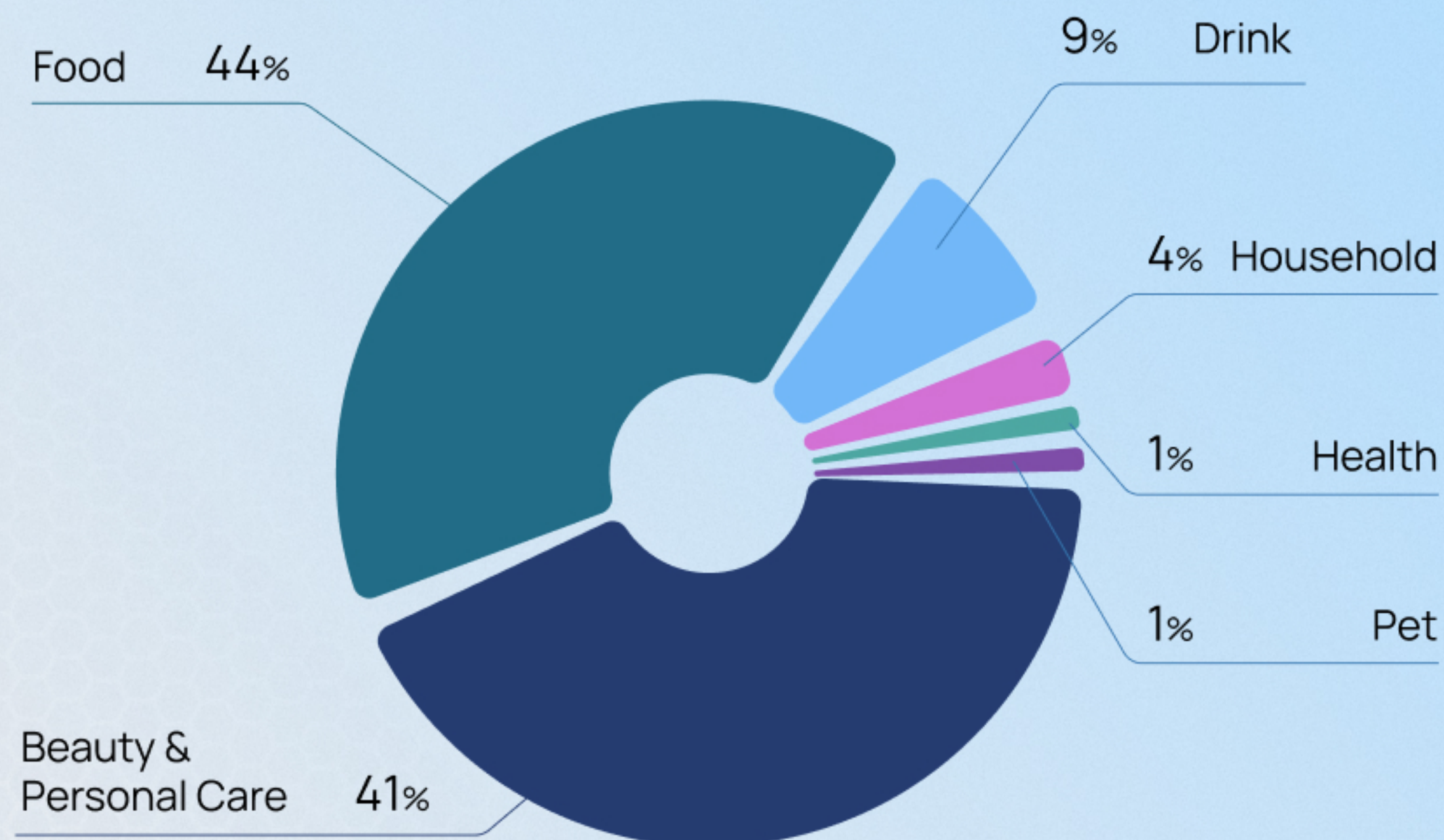
Inside the Hall of Fame

What the top 1% packs reveal about world-class packaging design.

What the top 1% reveal

The top 1% of packs have a Dragonfly AI Attention score of 95% or higher. Just under half of the products featured in the Hall of Fame are food, followed closely by beauty & personal care, at 44% and 41%, respectively. They're not concentrated in one market, or belong to one brand, or adhere to one design tradition.

"The Hall of Fame is not a heritage brand club. It is a peer group of products that did the fundamentals well."



BRAND CONSISTENCY

The brands with the most Hall of Fame packs are not the loudest. They are the most consistent.

The Hall of Fame is not won pack by pack. It is won by building a design system and applying it without compromise across every SKU, variant and market. Nivea has 74 products that feature in the Hall of Fame, followed by Nestlé with 48 and Avon at 47. This is not luck – it is consistency.

Nivea

Top score 100% 74 Hall of Fame packs

Beauty & Personal Care

Avon

AVON

Top score 99% 47 Hall of Fame packs

Beauty & Personal Care

Dove

Top score 100% 21 Hall of Fame packs

Beauty & Personal Care

Cadbury

Top score 97% 17 Hall of Fame packs

Food & Beverage

Coca-Cola

Top score 95% 17 Hall of Fame packs

Food & Beverage

Nestlé

Top score 99% 48 Hall of Fame packs

Food & Beverage

"Nivea has 74 products that feature in the Hall of Fame, followed by Nestlé at 48 and Avon at 47. This is not luck – it is consistency."

BRAND SPOTLIGHT

Nivea

👑 Top score 100% | 74 Hall of Fame packs

Nivea is the most-represented brand in the Hall of Fame. The iconic blue tin has barely changed in a century, and it scores 100% globally. Across skincare, men's care, body care, and baby, every sub-brand carries the same visual language: brand mark first, brand blue dominant, hierarchy clean. It is the definition of a design system applied at scale.

74 Hall of Fame packs across every market.
Not a coincidence — a system.

WHY IT WINS



Consistent brand representation across categories

Message clarity | High clarity score

Simple uncluttered architecture

Attention | 100%

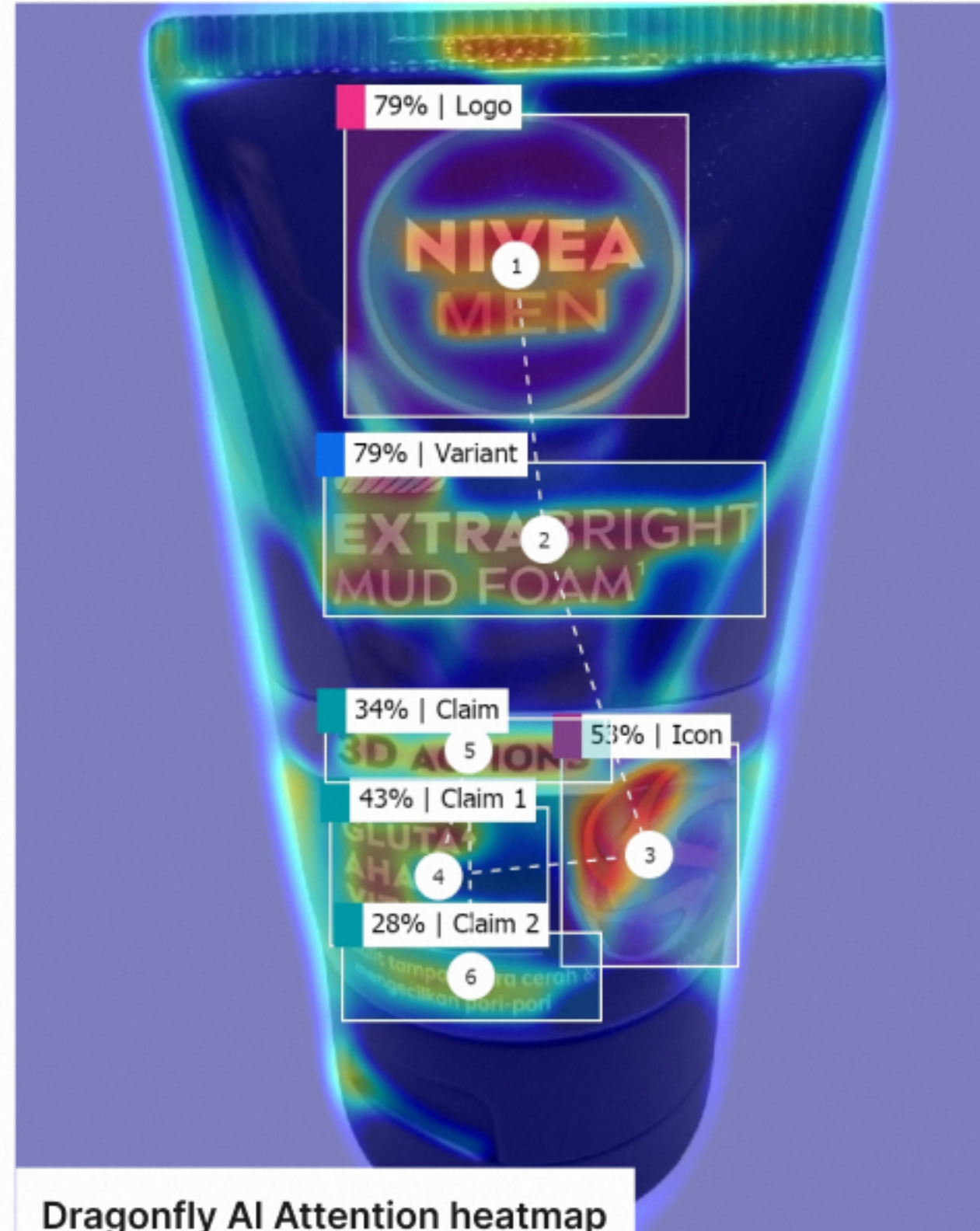
Visibility | 100%

Clarity | 100%

Digestibility | 100%



Original



Dragonfly AI Attention heatmap

Dragonfly AI

Attention	<div style="width: 96%;"></div>	96%
Visibility	<div style="width: 100%;"></div>	100%
Clarity	<div style="width: 97%;"></div>	97%
Digestibility	<div style="width: 87%;"></div>	87%

✦ Copilot

The brand elements dominate attention effectively, with both the Nivea Men logo and "Extra Bright Mud Foam" variant each capturing 79% of viewer focus. The consistent brand presentation ensures strong mental availability at point of purchase.

Emotion	<div style="width: 73%;"></div>	73%
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Memory	<div style="width: 53%;"></div>	53%
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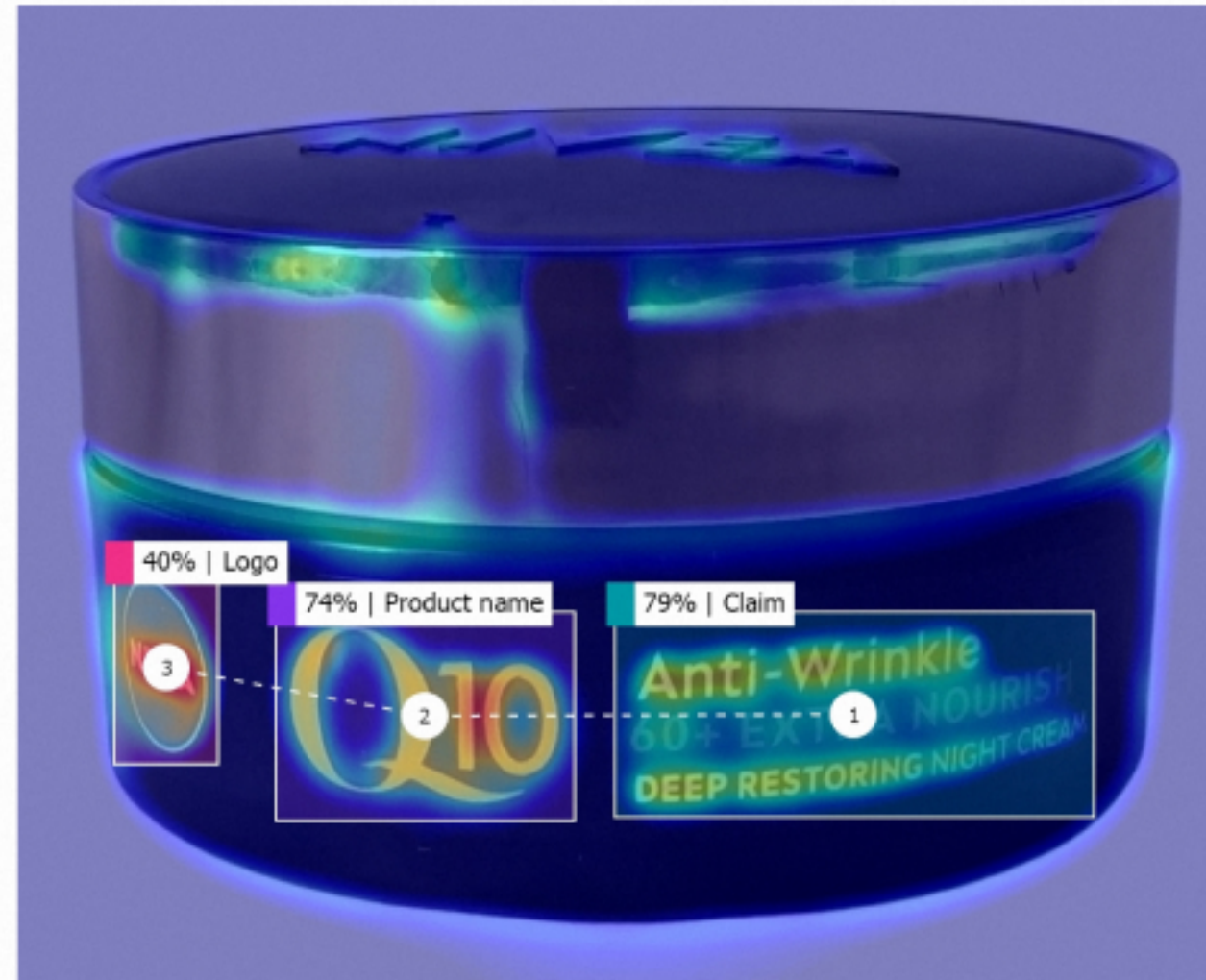
Want to go beyond Attention?

Uncover how likely your content is to be remembered, and how strong and positive the emotional connection is.

[Click here to book a demo](#)



Original



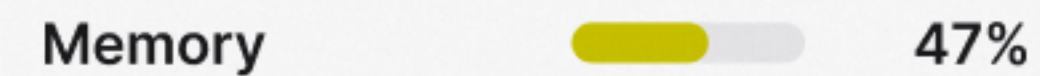
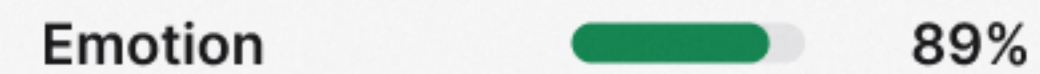
Dragonfly AI Attention heatmap

Dragonfly AI



✦ Copilot

This Nivea Q10 packaging achieves an exceptional digestibility score of 100%, significantly outperforming the packaging benchmark average of 77%. This suggests optimal information processing, with viewer attention effectively directed toward the three key messaging areas.



Want to go beyond Attention?

Uncover how likely your content is to be remembered, and how strong and positive the emotional connection is.

[Click here to book a demo](#)

BRAND SPOTLIGHT

Dove

Top score 100% | 21 Hall of Fame packs

Dove's 21 Hall of Fame packs reach across body care, hair care, and gifting. The white dove, clean white backgrounds, and minimal typography do the work consistently. Dove proves that a single, simple visual identity compounds over time.

21 Hall of Fame packs on three continents.
The same simple pack. The same
unmistakable brand.



Dove | Saudi Arabia

Attention | 100%

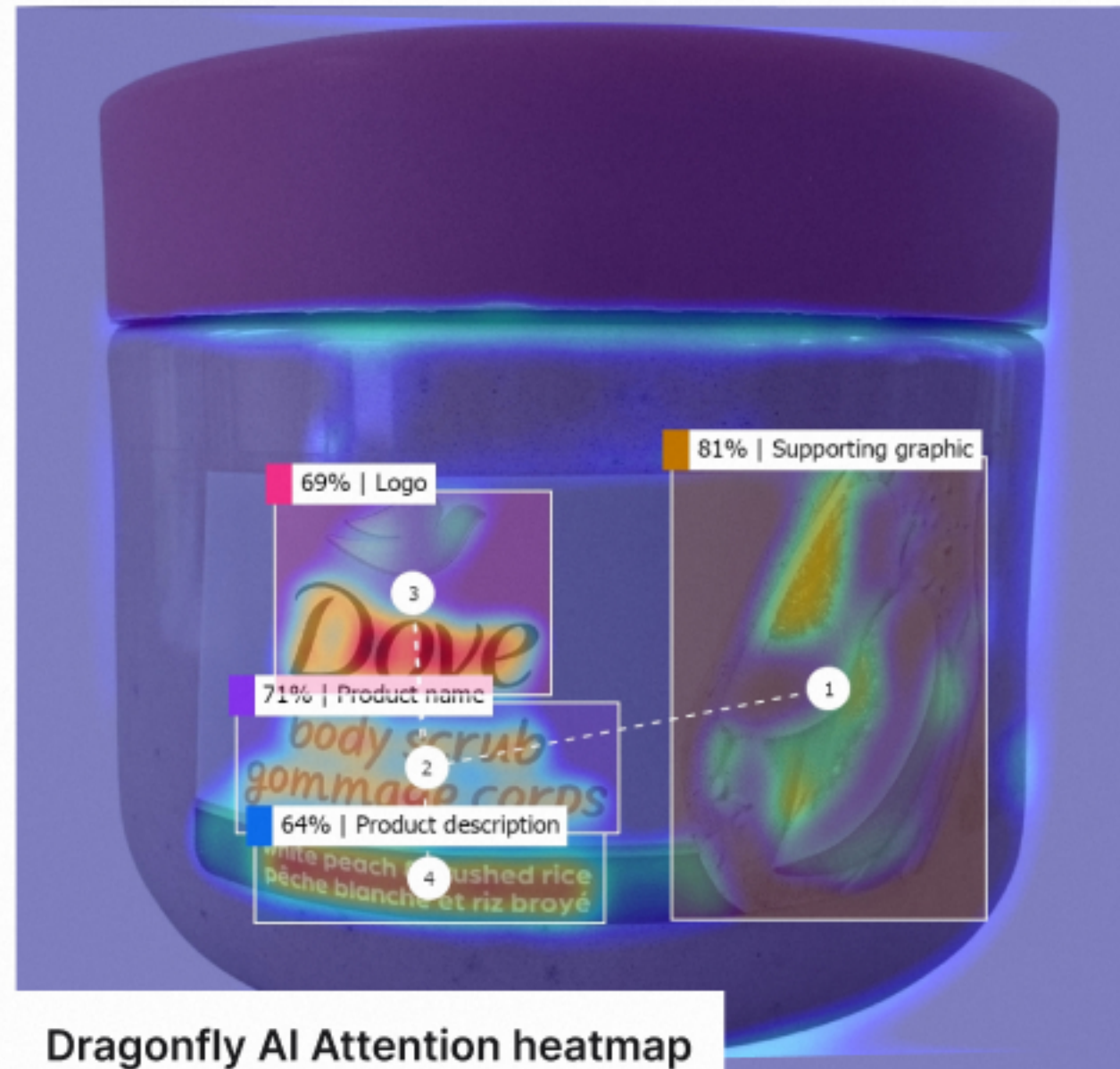
Visibility | 99%

Clarity | 100%

Digestibility | 100%



Original



Dragonfly AI Attention heatmap

Dragonfly AI

Attention	<div style="width: 96%;"></div>	96%
Visibility	<div style="width: 100%;"></div>	100%
Clarity	<div style="width: 86%;"></div>	86%
Digestibility	<div style="width: 100%;"></div>	100%

✦ Copilot

This packaging achieves an exceptional digestibility score of 100%, outperforming the packaging benchmark of 80%. This suggests viewers can efficiently process key product information, making it easy for consumers to identify and understand your brand at point-of-purchase.

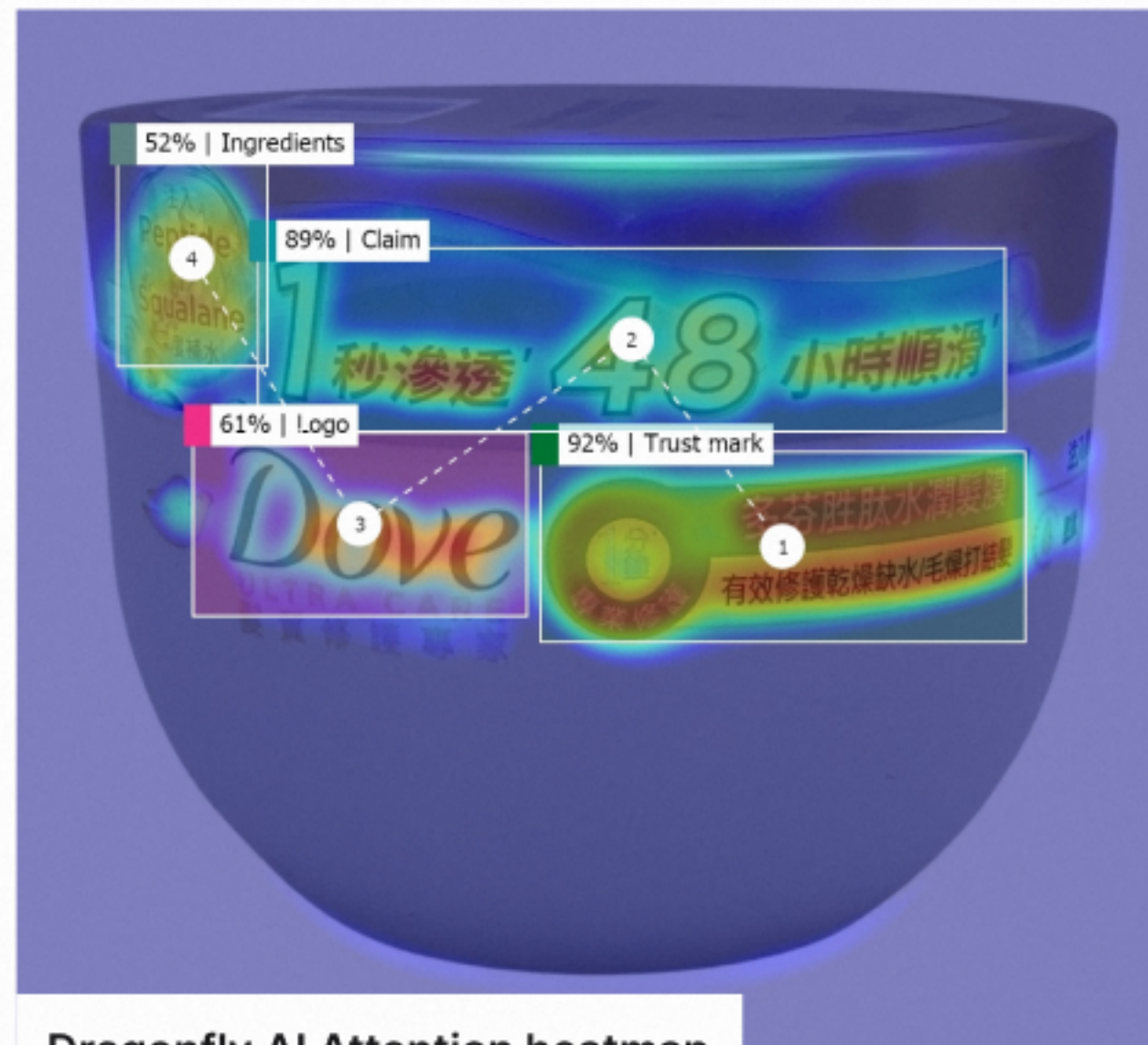
Emotion 52%

Memory 77%





Original



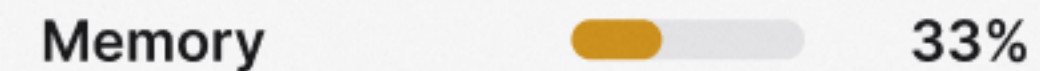
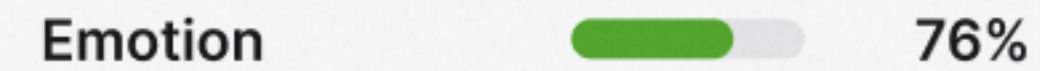
Dragonfly AI Attention heatmap

Dragonfly AI



✦ Copilot

The trust mark demonstrates outstanding digestibility at 92%, which helps reduce perceived risk at the point of purchase. This high score suggests consumers can quickly process credibility signals, potentially reducing purchase hesitation.



BRAND SPOTLIGHT

Avon

Top score 99% | 47 Hall of Fame packs

Avon's 47 Hall of Fame packs span cosmetics, skincare, fragrance, and shower products – a portfolio that could easily look inconsistent. Instead, Avon consistently places brand first, uses strong visual hierarchy, and lets colour carry the product story. One of the most globally consistent performers in beauty.

47 Hall of Fame packs across beauty, fragrance, and skincare. Brand discipline across a diverse portfolio.

AVON

Avon Sweet Honesty Skin Softener | USA

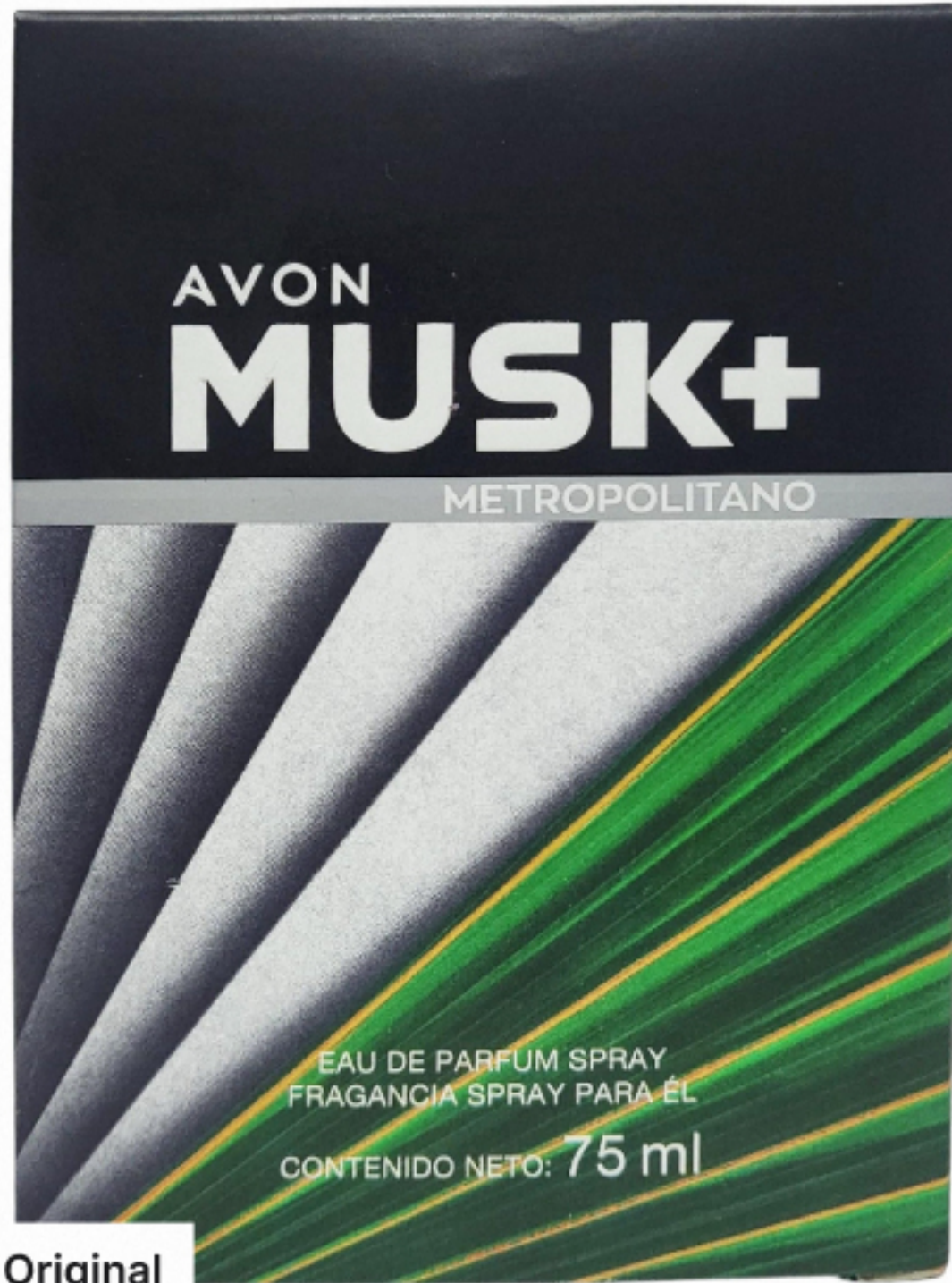


Attention | 99%

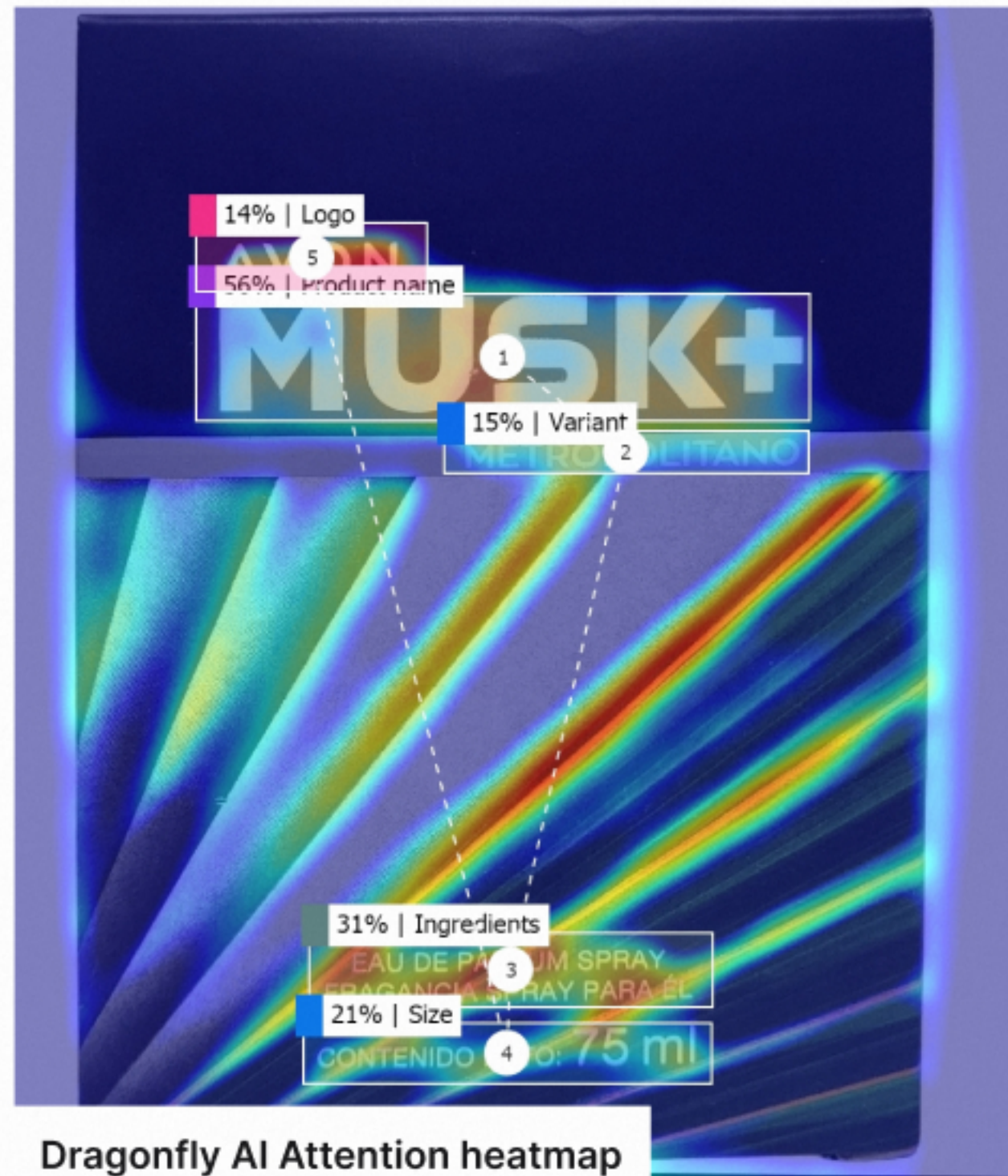
Visibility | 100%

Clarity | 95%

Digestibility | 100%

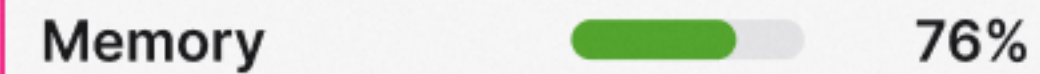
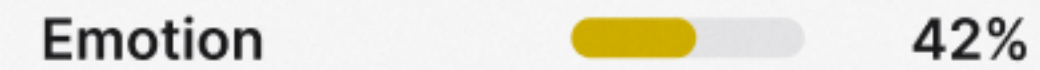


Original



Dragonfly AI Attention heatmap

Dragonfly AI



✦ Copilot

This Avon pack demonstrates strong foundational memorability through its clean layout and colour palette. It uses colour strategy to convey and reinforce brand story.

AVON

BRAND SPOTLIGHT

Coca-Cola

Top score 95% | 17 Hall of Fame packs

Coca-Cola's 17 Hall of Fame packs span three continents. They don't share a single design, but a single visual truth: the iconic curve, the classic red colourway, and the logo that needs no translation. Coca-Cola scores in the Hall of Fame not because it experiments, but because it doesn't need to.

17 Hall of Fame packs across three continents.
The same brand signal, every time.

Coca-Cola

Coca-Cola Zero Açúcar · Brazil

Attention | 95%

Visibility | 100%

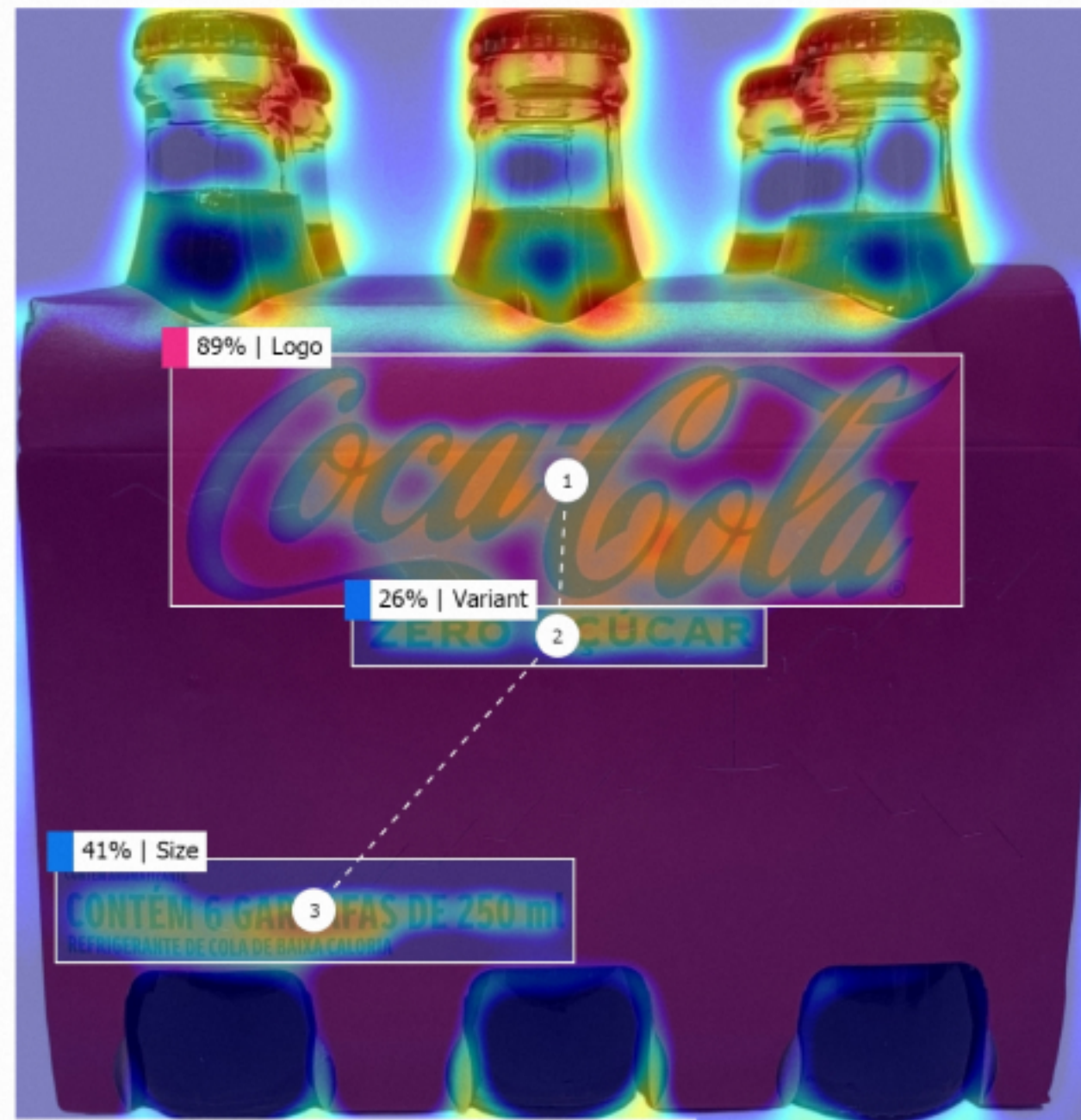
Clarity | 78%

Digestibility | 100%

BRAND SPOTLIGHT Coca-Cola



Original



Dragonfly AI Attention heatmap

Dragonfly AI

Attention	<input type="checkbox"/>	95%
Visibility	<input type="checkbox"/>	100%
Clarity	<input type="checkbox"/>	78%
Digestibility	<input type="checkbox"/>	100%

Emotion 78%

Memory 77%

✦ Copilot

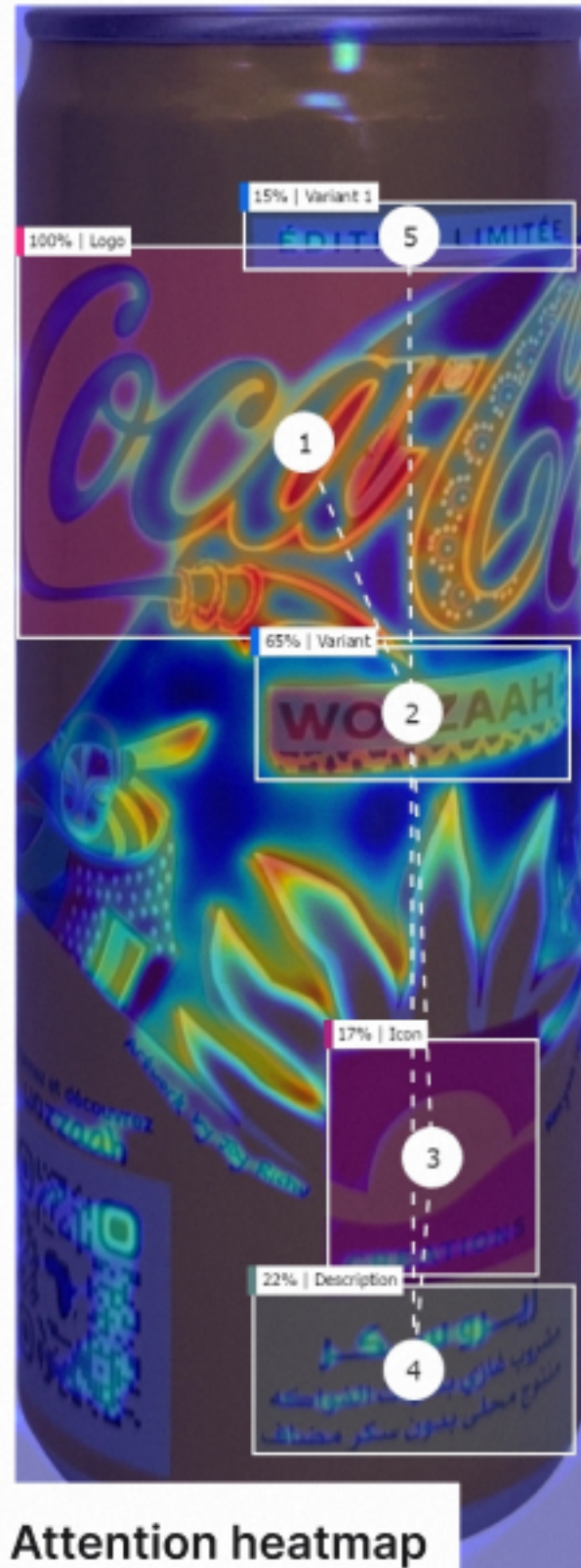
The three-bottle configuration creates a balanced, symmetrical composition that's easy to process and encode in memory. The clear glass bottles with their distinctive shape add familiar visual cues that strengthen brand recognition.



BRAND SPOTLIGHT Coca-Cola

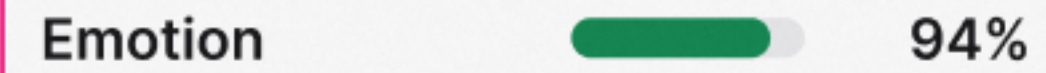
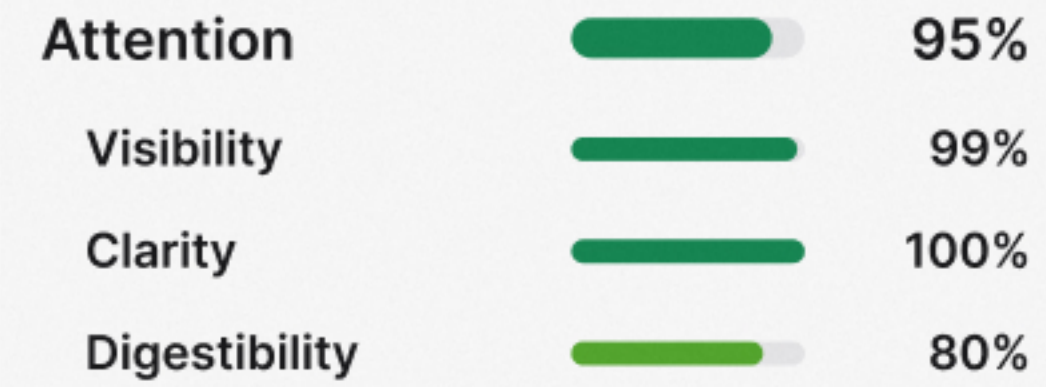


Original



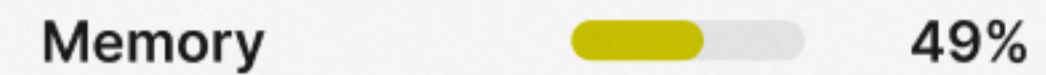
Dragonfly AI Attention heatmap

Dragonfly AI



✦ Copilot

The decorative cultural motifs and artistic styling create strong positive emotional responses through their novelty and visual richness. This cultural authenticity generates warmth and connection beyond typical product packaging.



BRAND SPOTLIGHT

Nestlé

Top score 99% | 48 Hall of Fame packs

Nestlé's 48 Hall of Fame packs span chocolate, dairy, nutrition, and hot drinks across 20+ markets. A portfolio that could easily fragment stays consistent: the Nestlé logo leads, the product name follows, and the rest is clean. The subcategory benchmarks are beaten wherever the brand shows up.

48 Hall of Fame packs across food, drink, and nutrition. One logo. One hierarchy. Everywhere.

Nestlé

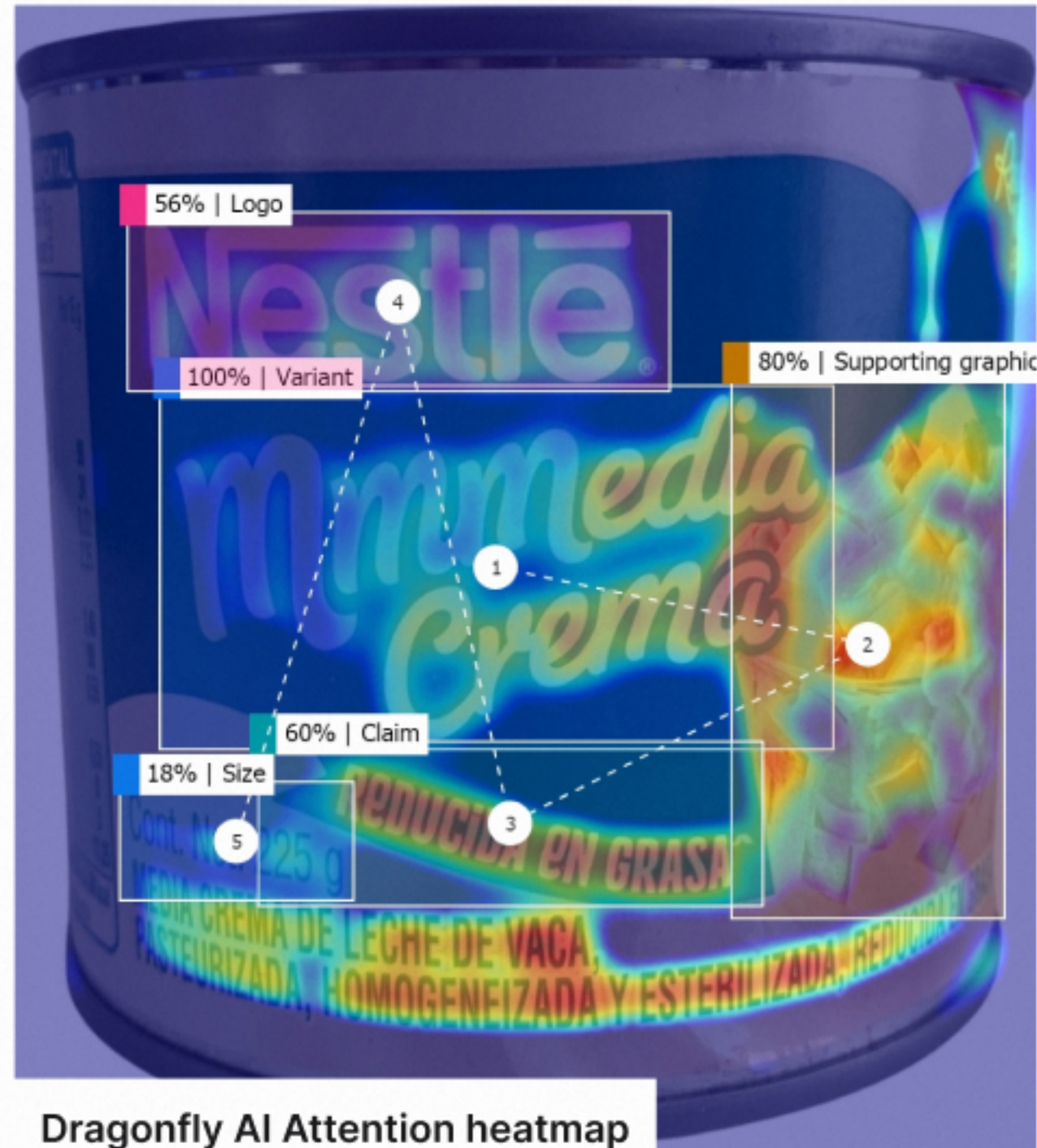


Attention | 99%

Visibility | 97%

Clarity | 100%

Digestibility | 100%



Dragonfly AI

Attention	<div style="width: 95%;"></div>	95%
Visibility	<div style="width: 100%;"></div>	100%
Clarity	<div style="width: 88%;"></div>	88%
Digestibility	<div style="width: 90%;"></div>	90%

Emotion 48%

Memory 82%

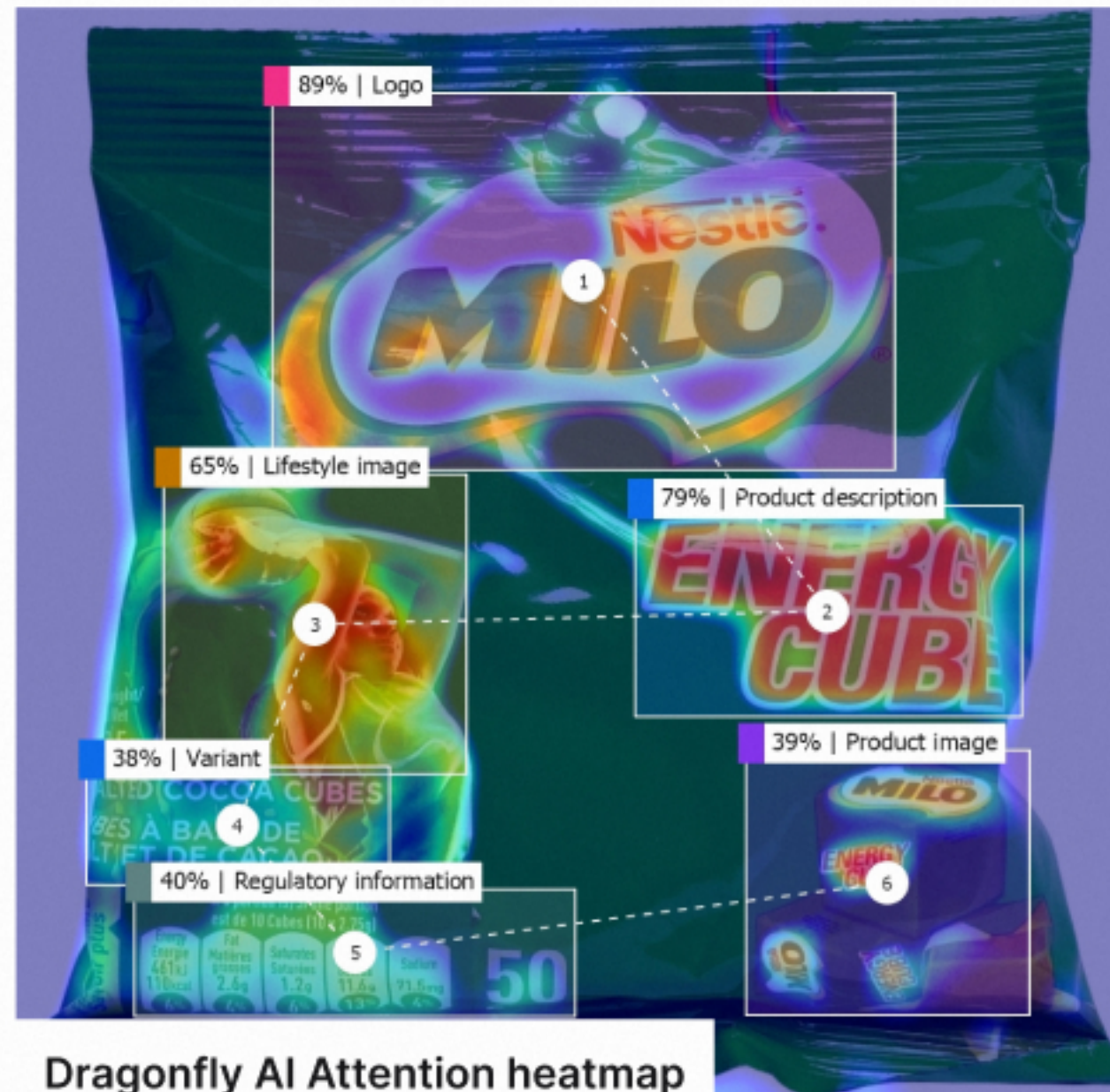
✦ Copilot

The logo placement at the top of the design creates immediate brand recognition, benefiting from high contrast and optimal sizing. "Media Crema" typography adds personality while remaining highly legible, and the distinctive teal colour provides strong shelf standout.





Original



Dragonfly AI Attention heatmap

Dragonfly AI

Attention	<div style="width: 90%;"></div>	90%
Clarity	<div style="width: 88%;"></div>	88%
Digestibility	<div style="width: 91%;"></div>	91%

✦ Copilot

With 89% attention to the Milo logo - this package builds strong brand recognition through distinctive asset salience. The 79% focus on the "Energy Cube" descriptor effectively communicates the product benefit, supporting category entry point recognition.

Emotion	<div style="width: 64%;"></div>	64%
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Memory	<div style="width: 79%;"></div>	79%
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Nestlé

BRAND SPOTLIGHT

Cadbury

Top score 97%

17 Hall of Fame packs

Cadbury's 17 Hall of Fame packs — from Dairy Milk in the UK to Choclairs in China, to Creme Egg in South Africa — all carry the same unmistakable purple colourway. It is one of the most recognised brand colours in the world, and it does the heavy lifting on every pack. Cadbury proves that a distinctive colour, applied consistently, is worth more than any design trend.

17 Hall of Fame packs built on one colour. The power of a distinctive asset applied without compromise.

Cadbury

Cadbury Dairy Milk in Lickables · India



Attention | 97%

Visibility | 100%

Clarity | 94%

Digestibility | 93%

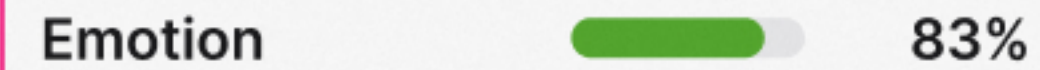


Original



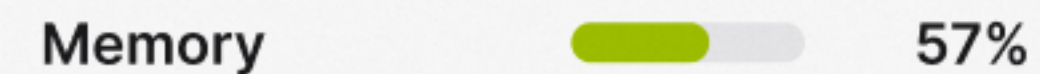
Dragonfly AI Attention heatmap

Dragonfly AI



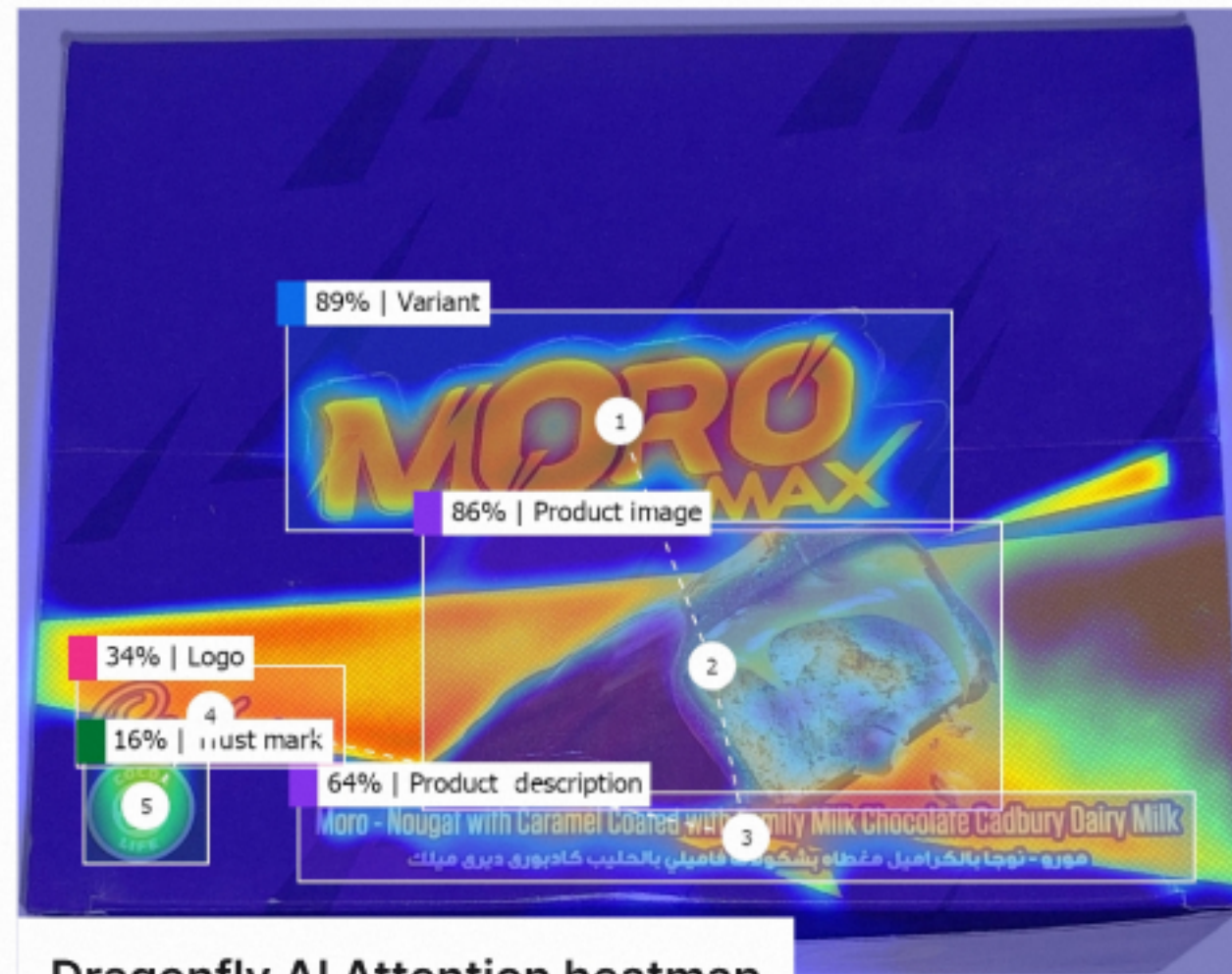
✦ Copilot

The central product image delivers a very positive emotional response, serving as the primary driver of the package's success. The arrangement of chocolate fingers with one strategically bitten piece creates immediate appetite appeal and clearly communicates the eating experience.





Original



Dragonfly AI Attention heatmap

Dragonfly AI

Attention	<div style="width: 97%;"></div>	97%
Visibility	<div style="width: 98%;"></div>	98%
Clarity	<div style="width: 100%;"></div>	100%
Digestibility	<div style="width: 91%;"></div>	91%

✦ Copilot

The current hierarchy effectively guides consumers through variant identification (89%) to product visualization (86%). This supports Sharp's principle that buyers need clear category entry points.

Emotion 45%

Memory 81%

Cadbury

SECTION 02

The fluency principle

The top 1% of packs aren't louder.
They are clearer.

What is the fluency principle?

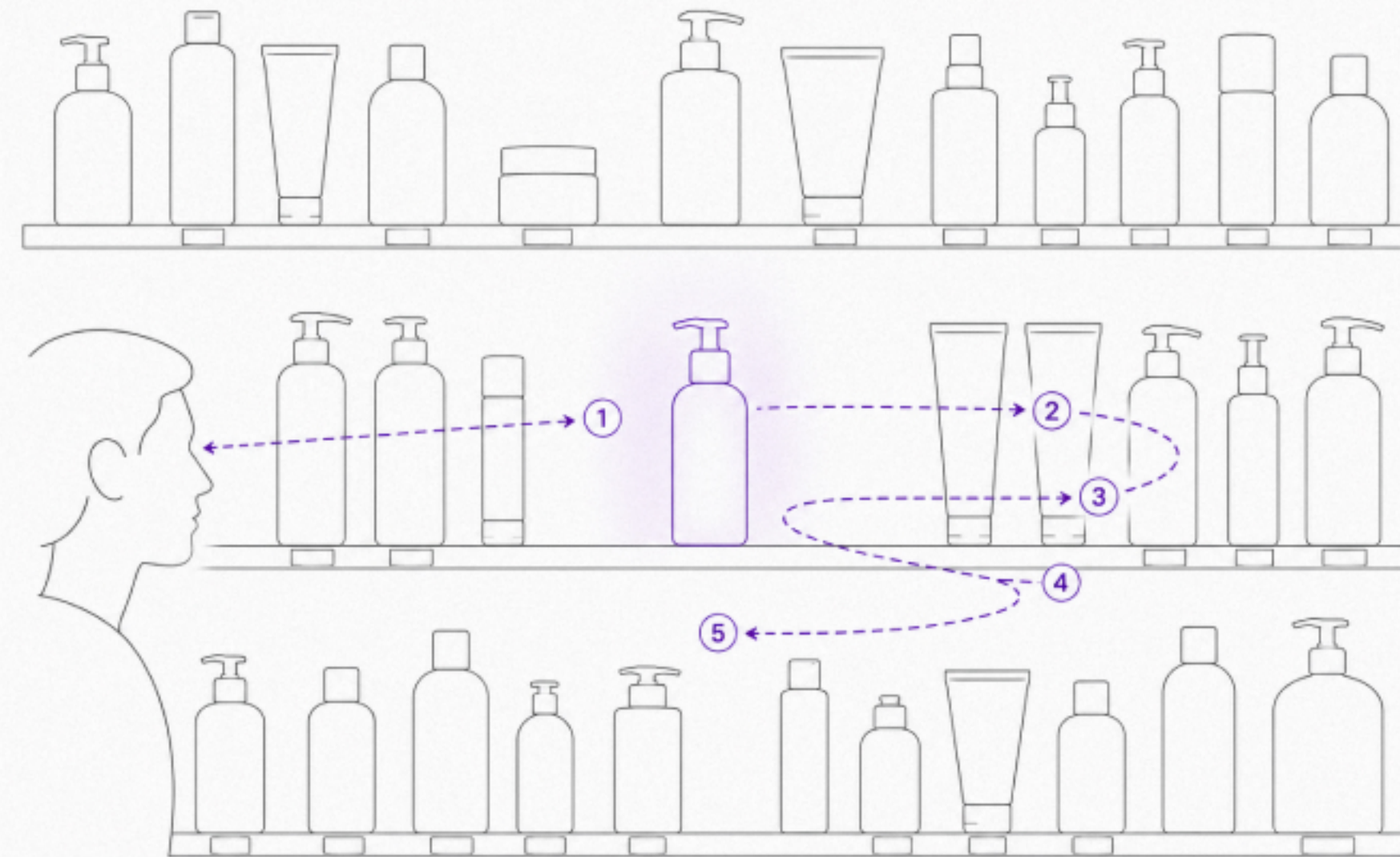
Processing fluency is a concept from cognitive psychology – the easier something is for the brain to process, the more positively we respond to it. Typically, we mistake 'easy to read' for 'trustworthy,' 'familiar,' and 'good'.

APPLIED TO PACKAGING, IT MEANS

Shoppers aren't consciously evaluating packaging – their brain is pattern-matching at speed

Packs that are visually fluent (clear hierarchy, familiar brand cues and minimal noise) get decoded in milliseconds and feel immediately 'right'

Packs that require effort – those that are cluttered, ambiguous, or inconsistent create friction, and this kills purchase intent



WHY DOES IT MATTER?

The biggest gap between Hall of Fame packs and the rest isn't visibility – **it's clarity.**

That's the fluency principle. The best packs aren't just eye-catching, they're effortlessly legible.

WHAT HALL OF FAME PACKS SHARE

The biggest gap is not Visibility. It's Clarity.

Compare Hall of Fame packs against the global population across all three quality scores. The pattern is unambiguous: the biggest differentiator is not shelf stand-out. It is the ability to direct attention clearly and efficiently once it is captured.

+15.9pts



Visibility lift vs population mean

+24.2pts



Clarity lift vs population mean

+20.7pts



Digestibility lift vs population mean

Most brands brief their agency for visibility – stop power, shelf stand-out, pack differentiation.

That brief addresses the first 200 milliseconds. The Hall of Fame packs win the next 200 too: once noticed, the brand reads first, the hierarchy is clear, and the message is processed before the hand reaches the shelf.

"The Hall of Fame is not a visibility club. **It is a clarity club.** Packs don't get there by being louder. They get there by being clearer."

WHY

Three forces are present in every Hall of Fame pack.

FORCE 01

Brand reads first



The brand mark resolves before anything else. **Distinctive cues – colour, shape, mark, typography – are unambiguous.** The pack tells you whose it is in the first hundred milliseconds, without effort.

Ask yourself: if someone saw this pack for 100 milliseconds, could they name the brand?

FORCE 02

Hierarchy holds



After the brand, the eye moves cleanly through the rest. One dominant visual element. Few competing decoys. **Variant, claim, format – all encodable before the consumer reaches for the shelf.**

Ask yourself: what is the second focal point, and does it support your intended message?

FORCE 03

Universal cues, no compromise



Orientation. Colour. Texture. Scale. The four pre-cognitive cues are deployed without hesitation. No timid colour blocking. No reluctant hierarchy. The pack does what packs are meant to do – completely.

Ask yourself: where on this pack did someone compromise – and is that compromise necessary?

SECTION 04

Category best performers

HALL OF FAME · BEAUTY & PERSONAL CARE

Top-scoring packs: Beauty & Personal Care



PANTENE PRO-V

Keratin Protect Mask
(Keith Haring Edition)

Belgium · Hair Treatments

Attention | 100%

Visibility | 100% Clarity | 100% Digestibility | 100%



VASELINE

Moisturizing Jelly

UAE · Body Care

Attention | 100%

Visibility | 100% Clarity | 100% Digestibility | 100%



REDKEN BREWS

Clay Pomade

Netherlands · Hair Styling

Attention | 100%

Visibility | 100% Clarity | 100% Digestibility | 100%



PALMOLIVE

Luminous Oils Macadamia
& Peony Hand Soap

Qatar · Liquid Soap

Attention | 100%

Visibility | 100% Clarity | 100% Digestibility | 100%

41% of Hall of Fame packs
are in this category

Clarity scores are weakest
across this category

Top Subcategory:
Nail Colour Cosmetics

Bottom Subcategory:
Functional/Medical categories

Top-scoring packs: Food & Drink



FERRERO ROCHER

Crisp Hazelnut & Milk
Chocolate Specialty

Cambodia · Individually Wrapped Chocolate

Attention | 100%

Visibility | 100% Clarity | 100% Digestibility | 100%



BEN & JERRY'S

Phish Food
Ice Cream

UK · Ice Cream & Frozen Yogurt

Attention | 100%

Visibility | 100% Clarity | 100% Digestibility | 100%



MILKA OREO

Christmas
Box

Germany · Seasonal Chocolate

Attention | 100%

Visibility | 100% Clarity | 100% Digestibility | 100%



HEINZ [SERIOUSLY] GOOD

Mayonnaise
Sauce

Greece · Mayonnaise

Attention | 100%

Visibility | 100% Clarity | 100% Digestibility | 100%

Clarity is the weakest signal
across Food & Beverage

Top Performing:
Dairy Packaging

Bottom:
Oils – significant attention left on the table

Top-scoring packs: Household



FEBREZE DOWNY

April Fresh Fabric Refreshener

South Korea · Fabric Fresheners

Attention | 100%

Visibility | 100% Clarity | 100% Digestibility | 100%



AIR WICK FRESHMATIC MAX

Wild Berry & Rose Petal Air Spray

Cameroon · Air Fresheners

Attention | 100%

Visibility | 100% Clarity | 100% Digestibility | 100%



TIDE DOUBLE POWER

Jasmine & Rose Laundry Detergent Powder

India · Automatic Detergents

Attention | 100%

Visibility | 100% Clarity | 99% Digestibility | 100%



ARIEL

Detergent for White and Colored Clothes

Costa Rica · Automatic Detergents

Attention | 100%

Visibility | 100% Clarity | 100% Digestibility | 97%

Only 4% of Hall of Fame comes from Household

Top Performing:
Drain Care

Bottom:
Test Kits & Foils and Wraps

KEY TAKEAWAYS

BOOK A 30-MINUTE SESSION WITH DRAGONFLY AI >>

Scale of consistency – the brands that win don't just have one great pack, they have dozens. Their Hall of Fame presence is a portfolio-wide pattern, not a one-off.

Distinctive brand assets applied at every touchpoint – this includes elements like colour, typography, logo placement and pack architecture that are instantly recognisable across subcategories and markets.

Clarity above everything – the single biggest differentiator between Hall of Fame and the rest is the clarity of packs. These brands communicate one message, fast.

Global reach, local execution – the five brands with the most Hall of Fame products operate across many markets, yet their core visual identity travels without dilution.

Multi-category presence – each brand spans multiple subcategories (skincare, haircare, body care, etc.) while maintaining a unified shelf language.

Decades of brand equity – none of the Hall of Fame products belong to challenger brands. The packaging encodes years of consumer familiarity, which compounds visibility.

Simple, uncluttered pack architecture – high Dragonfly AI Digestibility scores reflect designs that don't ask the shopper to work. Hierarchy is clear, noise is minimal.

The brands that are winning treat packaging as an asset, not just a container – the pack is doing active marketing work, not just identifying the product.

SECTION 05

The Benchmark is already live in GNPD

Inside the tool your team
is already using.

GO BEYOND THE BENCHMARK

The Hall of Fame shows you the bar. Dragonfly AI helps you get there.

BOOK A 30-MINUTE SESSION WITH DRAGONFLY AI >>

Test before you launch

See how any pack design performs before you go live. Our platform predicts Attention, Clarity, Visibility and Digestibility on all your designs in seconds, so you can identify and fix issues before launch.

Identify your Hall of Fame products

Our sales team can show you how you can improve performance across your portfolio and which of your products fall in the Hall of Fame.

Benchmark against peers

Every pack is scored against its subcategory benchmark – the achievable ceiling for that specific competitive context, not the population mean.

Optimise across every channel

Packaging is just one touchpoint. Dragonfly AI scores and optimises creative across digital advertising, in store, point of sale, out of home and ecommerce – any content, any channel – so your brand signal is consistent and effective wherever the shopper encounters it.

DRIVE STRONGER COMMERCIAL RESULTS

70%
ECOM CONVERSION

+41%
SOCIAL ADS RESPONSE RATE

+60%
PROMOTIONAL SALES

+263%
ROI EMAIL CAMPAIGN



“Dragonfly AI has paid for itself within three months by cutting the cost of conversion experiments by an average of 40%.”

Reckitt Digital Capabilities Director

TRUSTED BY THE WORLD'S LEADING BRANDS



See where your portfolio stands.

BOOK A 30-MINUTE SESSION WITH DRAGONFLY AI >>

DRAGONFLYAI.CO/MINTEL

MINTEL.COM/GNPD

ABOUT THE DATA

About the data

All findings drawn from Mintel GNPD are scored using the Dragonfly AI Attention model. Subcategory benchmarks: mean Attention Score across all packs within the same GNPD subcategory. Quality scores (Visibility, Clarity, Digestibility) are direct outputs of the Dragonfly AI Attention model; composite Attention score is integer-valued (0–100%). T1/T2 market classification per Mintel GNPD taxonomy. Innovation products: from Mintel editorial selection, 2025–26.

About Dragonfly AI

Dragonfly AI is the world's smartest creative testing solution to maximise creative effectiveness. Powered by patented, biologically inspired AI and grounded in over a decade of neuroscience research, Dragonfly AI predicts how real people will see, feel, and remember creative content before it goes live. The platform helps brands optimise creative performance across digital, in-store, and omnichannel environments, combining insight across Attention, Memory, and Emotion. **Visit dragonflyai.co to book your demo.**

About Mintel

Mintel is the world's leading market intelligence agency. Mintel's GNPD is the world's largest packaged goods database, capturing every meaningful product launch across 83 markets and used by thousands of CPG brands, retailers, and agencies worldwide.

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