9.2 Classifying Packaging Change in the Embedded Cases

Of the fourteen projects examined, the emphasis of their packaging activities can be classified as follows:

- Three exhibited skin deep change (A, H, L), each primarily focused on the core product.
- Two resulted in body modification developments (I, K), whilst another was yet to reach the market (C). Two projects focused on body modification failed to successfully reach the market (M, N). The chocolate spread project focused on body modification change, but also resulted in the launch of a new format (J).
- Two projects developed format changes (B, F), and two targeted format change but were ultimately not launched (D, G). In Project E, the team attempted to utilise a new format for the radical new wrap product, but ultimately adopted an established format with modifications.

Each of the packaging focused projects involved either modifications to the body or format change, while only one of the core product focused projects involved activities exploring opportunities for format change. The following sections will identify factors influencing the level of focus. In the case of core product focused projects, the results revealed that the NPD process and members of the team influenced the orientation of packaging activities (skin deep or body modification). Project managers, with no technical packaging capability, were able to make packaging decisions at an early stage, which later ruled out the possibility of format change.

9.3 Level of Packaging Capacity

9.3.1 Incorporation of Packaging champions

The cases provide evidence that the pursuit of opportunities for technical packaging development and format change required the presence of a packaging champion. A champion was identified within each of the format change cases. By comparison, there was no champion in seven of the nine skin deep and body modification projects; as a result, technical development received little attention.

The significance of a champion was particularly evident in product-focused projects. Where a champion was not present (A, H, I and L) decisions made by the core NPD
team resulted in opportunities for format change receiving a lack of attention. In each case, the team specified a standard, well-accepted format. Within the remainder of product focused projects (E and K), packaging specialists were incorporated into decision making. However, Project K revealed this did not ensure that there was a champion for change per se.

The influence of packaging specialists was affected by their primary capabilities. This resulted in an emphasis on particular elements of the packaging, and was particularly evident within CrispChips and Newway. CrispChips packaging team did not act as a champion for format change; their inherent emphasis was on cost implications. As a result, opportunities were constrained to modifying the existing format. This was particularly evident in Project K, where the feasibility of change beyond the current format was ruled out. Project J illustrated the orientation of Newway’s packaging team: which primarily acted as a champion for aesthetic change within the existing tub format. Their lack of emphasis on technological opportunities carried with it the risk that viable opportunities could be overlooked (detailed further in sections 9.3.2 and 9.3.3).

A technical packaging champion was identifiable within each of the projects pursuing format change. A champion was also observed in Project C, a technically focused body modification project. In each case, this individual played a key role in championing change, gaining the support of key stakeholders, and managing the projects themselves. The champion’s significance was particularly highlighted in Project E, the only product-focused project which also pursued packaging change. The integral incorporation of this individual within the project, combined with the need to identify a suitable pack for the radical new product, resulted in the pursuit of opportunities. However, despite the packaging champion’s success in uncovering a new format, when developing the other sandwiches within this range, the NPD team simply specified existing formats. No opportunity was provided for packaging staff to pursue new developments. This was despite internal recognition that a key competitor possessed better technology than their existing format.

Prior research has uncovered the roles of heavyweights and champions in NPD (Koufteros et al., 2002; Hong and Schniederjans, 2000; Clark and Fujimoto, 1990). Linking the case findings to this research reveals that packaging champions performed similar roles for packaging: leading projects, working with suppliers,
contributing their expertise, and overcoming resistance to projects through
discussions with key stakeholders. Unlike product champions, however, they lacked
power and were unable to make format change decisions themselves. This was
particularly illustrated in Project D, where the champion was unable to have the new
technology implemented. The subsequent successful exploitation of this technology
by a competitor revealed that a viable opportunity had been missed.

These results support Proposition 1, providing evidence that the absence of a
technologically packaging champion was associated with an emphasis on skin deep
and body modification level changes. As a result, no individual took responsibility for
pursuing the opportunities for technical change. By contrast, where a champion was
present, packaging received a greater degree of consideration, and opportunities for
innovation were actively pursued. The champion’s role held the potential to positively
influence both potential and realized absorptive capacity (Zahra and George, 2002):
increasing the attention packaging received, promoting supplier collaboration, and
driving projects to exploit new technology.

9.3.2 Technical Capability and Absorptive Capacity

The presence, or lack, of staff with technical packaging capability within projects was
linked to absorptive capacity (Cohen and Levinthal, 1990). The capabilities of each
firm’s packaging team impacted upon their influence.

The influence of a packaging team’s capabilities was particularly evident in
CrispChips and Newway. Newway’s team was primarily design orientated. The
opportunities presented by external technologies were not actively pursued, nor were
they integral to the team’s ‘fast pack’ process. This resulted in a propensity towards
design driven skin deep or body modification changes.

Lack of emphasis on format change was more pronounced within CrispChips. The
team were not comfortable with change which moved them beyond their current
format. Their engineering and production orientated capabilities effectively
suppressed the pursuit of opportunities presented by externally developed
technology. As Ahuja and Lampert (2001)’s research would suggest, the team’s
existing competencies resulted in a focus on refining existing knowledge, and
disposition to explore knowledge in areas closest to existing expertise. The team’s
propensity to collaborate with existing suppliers was also linked to their capabilities,
which facilitated discussions due to greater complementarity (Cohen and Leventhal, 1990; Abecassis-Moedas and Mahmoud, Jouini, 2008).

The packaging teams within Orchids and DarbysOwn, by contrast, both displayed a greater propensity to collaborate with suppliers. Each project involving format change relied on the capabilities of the retailer’s packaging team. The team took responsibility for identifying externally developed technologies, and working with packaging suppliers to develop and apply the new formats. The capabilities held within DarbysOwn’s packaging team in particular increased absorptive capacity, through greater receptivity to technical change (Kedia and Bhagat, 1988) and enhanced ability to recognise the value of new technologies (Gries and Fischer, 2001; Tsai, 2001; Tsai, 2002; Verona, 1999; Abecassis-Moedas and Mahmoud; Jouini, 2008). Within Orchids, there appeared to be a lower level of technical capability. This increased its reliance on external partners.

The product focused cases revealed that whilst technical packaging capability may reside within a firm, opportunities for technical and format change are unlikely to be uncovered where a packaging team are not incorporated. The lack of technical knowledge held by many key decision makers was significant, as absorptive capacity depends upon the ability to access external knowledge (Ivan Wijk et al., 2001). Format decisions made by project managers carry with them an inherent risk that opportunities may be overlooked. This risk results from lack of opportunity for the packaging team to share their knowledge (Matusik and Hill, 1998; Zarah and George, 2002), and the associated lack of activities to explore the opportunities presented by suppliers’ externally developed technologies.

The above results provide support for Proposition 2. Lack of staff with technical packaging capabilities resulted in a propensity towards skin deep and body modification changes, and an associated lack of meaningful supplier input (Chapter 7).

9.3.3 Industrial Packaging Design Capability
The view of packaging development held by key decision makers within each project clearly influenced orientation of packaging activities. In some cases, lack of packaging industrial design capability led to the potential presented by innovative
new packaging being entirely overlooked, as a result of failure to consider packaging at the technical level.

Projects A, H, I and L provided evidence that NPD project teams were primarily focused on development of the core product; made format decisions with minimal consideration, and without the involvement of specialists. This partly resulted from their lack of industrial design capability, and view of ‘packaging development’. This simplistic view carried with it an inherent risk that opportunities might be overlooked. No opportunity was provided for industrial packaging design specialists to explore prospects for technical format change. Moreover, in Projects H and I, the project manager’s perception that format specification was a simple consideration resulted in problems. In both cases, the team completely failed to consider the technical aspects of packaging, resulting in the late involvement of technical packaging staff to resolve problems. This was found to result in additional costs being incurred and delayed product launch; and carried with it the additional risk of investment being wasted on an unviable product.

Projects within CrispChips and Newway identified a lack of packaging specialists with industrial design capability. Each packaging team held a myopic viewpoint, which risked opportunities being overlooked. CrispChips’ team held a view of development which largely emphasised format, primarily material, changes. The team were not comfortable with change that would move them beyond the current ‘pillow’ format.

As the literature on absorptive capacity (Cohen and Leventhal, 1990; Abecassis-Moedas and Mahmoud, Jouini, 2008) suggests, the team’s prior knowledge and experience were critical to this emphasis, leading them to focus on format modifications and label changes. Their view was primarily influenced by three factors: the capital investments of change, impact on unit costs, and belief that consumers would not pay more for a new format. This was despite many competitors adopting new formats within recent years, such as cardboard tubes and boxes.

Within Newway’s team, packaging development was primarily viewed in terms of aesthetic design, reflecting their primary capabilities. This was evident in the emphasis on the ideas of designers and views of consumers in development. Project J provided evidence that this view was too narrow. The brief developed by the team (working alongside product managers), focused on redesigning the existing tub
format. However, the eventual launch of the new doy pack provided evidence that the decision to adopt this narrow focus represented an error in judgement. In this case, the team were extremely fortunate that the new opportunity was identified; but in other projects, this type of opportunity may have been missed. Had the team held a more enlightened view of packaging, beyond skin deep and body modification change, the original brief would have incorporated opportunities for this type of change.

The packaging teams within DarbysOwn and Orchids, by comparison, held a different view. Each explored new formats, particularly DarbysOwn’ team, and worked with suppliers to develop new technologies. This resulted in a number of new developments in the projects studied. Their technical perspective and understanding influenced how they perceived information (Ivan Wijk et al., 2001). Technological format change received a greater level of attention, and was viewed as a key driver of opportunities.

The above results provide confirmation of the third proposition: lack of packaging specialists with industrial design capability leads to a myopic view of packaging development. The pursuit of opportunities for innovative new packaging is reliant on the integration of industrial design capability. These findings are closely related to the issue of absorptive capacity (Cohen and Levinthal, 1990), and provide new insights into the significance of the perceptions and views of key decision makers. In some cases, a myopic view and understanding of packaging prevented decision makers from recognizing the value which external knowledge and technology could represent. This view acted as a barrier to collaboration with external suppliers.

9.4 Buyers

Buyers influenced decision making in the majority of projects, resulting in a heavy emphasis on costs.

Within skin deep projects, the NPD team was commonly found to specify a standard type of packaging, then entrusted buyers to purchase it - which resulted in cost being virtually the sole criteria in supplier selection, as Bomsel and Roos (1990) suggest. The buyer acted as the primary interface for suppliers. As a result, suppliers had little meaningful input.
In body modification projects, buyers were frequently identified as playing a key role in decision making on the basis of costs. Within Projects K, M and N, this influence was crucial to the rejection of change; and in Projects J and K, it constrained the degree of it which could occur. Buyers were also found to be key to supplier selection and communication, particularly in the cases of Projects J and I.

In Project J, the influence of buyers was evident in two respects. First, the initial focus on a tub format was partly influenced by desire to keep costs low. However, the emphasis on minimizing costs was later shown to be questionable by the development of the doy pack, an opportunity that could otherwise have been missed. Second, their influence led to the removal of the flowing lines from the original packaging designs; hence even minor changes attracted the attention of buyers.

The influence of buyers was also found to carry an additional, operational level, risk within Project I. Buyers were entrusted with the responsibility for supplier selection, and selected the supplier that would produce the product for the lowest cost. However, the choice of this supplier was in part responsible for the problems experienced later in the project. Their lack of experience and understanding of chocolate products resulted in the use of a glue which was inappropriate, due to its strong odour.

Within each of the format change projects, buyers were also found to play an influential role. Buyers influenced the decision to reject the new format on a cost basis in Projects D, E and G. By contrast, in Project F, they actually facilitated and supported change, due to it lowering costs. Only in Project B were format changes made despite cost concerns: as a result of the team’s belief that it was integral to a customer segment, and the potential to charge a price premium for the new format.

The above findings provide support for Proposition 7. The role of buyers resulted in heavy emphasis on costs. This constrained change, or led to it being heavily focused on cost improvements in the majority of cases. Moreover, where buyers were given responsibility for supplier communications, this resulted in a cost transaction based purchasing relationship (Wynstra et al., 2010). This was particularly evident within skin deep projects, where supplier involvement was largely limited to establishing the packaging’s cost. They had little meaningful input into development.
9.5 Perceptions of Flexibility in the Production Process

Prior research has highlighted the significance of the production process within process industries (Lager and Blanco, 2010; Lager, 2000). In this study, the highly automated nature of the production line used to produce many of the products, combined with their low margin high volume nature, acted as a barrier to format change. As a result, projects involving products with a less automated production line carried with them a greater scope for change, due to lower capital equipment implications (illustrated in Projects A, E, F, and to an extent, B). Projects with higher cost implications were typically more incrementally focused (H, K, M, N), and required greater consideration of the production line (I). However, as Bunduchi and Smart (2010) suggest, other related costs impacted on this decision-making. For example, costs of retraining and building new production capability impacted upon Project H.

Focus on costs and efficiency led to an emphasis on exploitative activities, at skin deep or body modification level, which crowded out more significant innovations (Benner and Tushman, 2002). This was particularly evident within CrispChips, where the emphasis was on developments within the existing ‘pillow’ format. This reinforced the packaging team’s existing capabilities and skills (Burns and Stalker, 1966; Hage, 1980; Ettlie, Bridges, and O’Keefe, 1984; Tushman and Anderson, 1986).

The importance of process change costs and a focus on efficiency is not a significant revelation in itself (Utterback and Abbernathy, 1975). Importantly, however, perceptions of the line’s flexibility were influential in each team’s willingness to pursue technical change. Projects F, J and D revealed that ruling out format change on the basis of perceived costs, and without sufficient evaluation, held the potential for viable new product opportunities to be missed.

In projects F and J, despite there being a rationale for avoiding more costly format changes on the basis of production line costs, the findings revealed that it could still prove viable. In Project F, this was achieved by renting equipment; whilst in J, the firm uncovered existing technical production capability held elsewhere within it, lowering the level of risk and investment.
The literature on absorptive capacity provides further insight into the nature of this risk, revealing that the costs of change are linked to, and reduced by, knowledge and experience of technology (Teece, et al., 1997; Zander & Kogut, 1995; Zott, 2001). Hence decisions of a firm’s packaging team may prove incorrect, as a result of their lack of understanding of an unfamiliar new format. Project D provided further evidence that focus on perceived costs could lead to lost opportunities. In this case, the category manager’s decision to reject the new format was, thanks to a competitor’s subsequent successful exploitation of it, proven, to be a costly error in judgement.

The above findings provide support for the fourth proposition of the study, and create new insights into the perceptions of the production line in decision-making. An over-emphasis on this line, without sufficient investigation, carried with it the risk of overlooking viable opportunities for format change.

9.6 Role and influence of the Consumer

Consumers were integral to development in each skin deep and body modification project, whereas suppliers were found to play a more critical role in body modification projects.

The focus of skin deep projects, primarily on changes to graphics and text, resulted in consumers being integral. Involving them aimed to optimise their response to these aspects of packaging. Consumers were also integral within the development of body modifications. Their role was particularly evident in Projects L, M, and N, where decision making was primarily driven by their views. For example, within Projects M and N, rejection of these new developments was justified on the basis that consumers would be unwilling to pay the premium.

Project C was relatively unique amongst the body modification projects. Whilst it was initiated on the basis of elderly consumers’ needs, suppliers and external networks were incorporated to a greater extent. This led to a greater technological focus, resulting in the identification of a possible new technology.

In format change projects, consumers played a less significant role. Whilst their input was gained within development, and in the case of Projects B and D, influenced the original rationale, the process was not as heavily consumer focused. In each case,
development was driven from the identification of new technologies within suppliers, and a subsequent co-development project.

The evidence supports the proposition that a skin deep and body modification level focus leads to a market driven development process. These findings are broadly in line with the prior research (Christensen and Bower, 1996; Trott, 2001; Christensen, 1997). Moreover, Projects I, J and L in particular suggest that this is linked to a focus on incremental change (to the established format). The consumer’s input was primarily utilised to refine an existing or well-established packaging format. Suppliers had little meaningful input.

9.7 Role and power of retailers

Prior research has identified the increasing power of retailers (Sparks, 1993; Burt, 1993; Corstjens and Corstjens, 1995; Dawson, 2000; McGoldrisk, 2002; Fernie, Moore and Fernie, 2003), and the highly sought after shelf space within their stores (Corstjens and Corstjens, 1995). Within this study, these factors resulted in concerns that packaging changes influencing the product’s display could lead retailers to reconsider their decision to stock it, or its’ positioning on their shelves: leading to an emphasis on less significant skin deep and body modification changes.

The limited levels of change involved in skin deep level development carried with them low levels of risk that changes would impact on the product’s display. This resulted in little need to consider the impact of these changes on the product’s retailing. However, within Project H, the key decision maker’s belief that using an existing format negated any need to consider the product’s retailing was later linked to problems uncovered in the developmental process. This resulted in the product being inadequately protected by the initial packaging design.

Body modifications required greater consideration of the retailer. Within Projects M and N, concerns relating to the product’s retailing were influential in the rejection of these new technologies, due to potential issues with the display of the product (M), and its shelf life (N). Managers were concerned both with the direct impact of these issues, and how the retailer would react to them. Similarly, these concerns were key to the focus on the ‘pillow’ format within Project K. These results reveal that concerns relating to the product’s retailing constrained change. However, Project J illustrated that narrowing the scope of change on this basis held the potential for viable
opportunities to be overlooked. The doy pack’s launch illustrated that format change was viable despite such concerns.

The product’s retailing was a pertinent issue within four of the format change projects. Within Projects E, F, and G, concerns over a potential reduction in the product’s shelf impact, as a result of format change, resulted in a high level of attention being devoted to minimising potentially negative consequences. Decision makers were concerned with both the potential for lost sales, and subsequent risk to the merchandiser’s willingness to continue stocking the product. Within Project E, these concerns led the team to increase shelf signage, to promote the product via this other method of communication. Decision makers were not concerned that this would prevent the products from reaching the shelf.

With the drive for change coming internally and from category managers, there was little risk that the new formats would not be stocked. In particular, in Projects E and F, there was a strong desire amongst key stakeholders within the retailer to get the packaging (and product in the case of Project E) to the market. This reduced concern that the selection of an innovative pack could result in the product not reaching the shelf.

The results provide evidence that skin deep, body modification, and format change projects require increased consideration of the product’s retailing. In the case of own brand packaging development, this led to increased perceptions of risk; and that should more significant changes be attempted, retailers may reconsider the product’s positioning on the shelf, or even their willingness to stock it.

Luo et al. (2007) have suggested the need to establish and consider acceptance criteria for new products. In the case of brand owners, these concerns were seen to result in teams avoiding more significant changes, without communicating with the retailer. Within own brand NPD, these concerns also influenced decision making. However, more connected forms of decision making (where all key stakeholders were involved, including those responsible for making decisions on the product’s merchandising), meant that the concerns acted as less of a barrier, and could be overcome. Nevertheless, it was considered necessary to implement strategies to overcome any potentially negative impacts on the product’s shelf presence.
Finally, the findings with respect to the product’s distribution warrant brief discussion. Whilst this was of limited significance within most projects, the results suggest that skin deep, body modification, and format change required increased consideration of the products distribution. Distribution was a particularly important consideration within Projects M and I. In the case of M, it was clear that the nature of the product (low margin, high volume, and that the packaging stored a lot of air) resulted in a need to consider the impact of distribution on its cost. In I, the online nature of the product’s distribution led to a need to consider postage costs. Finally, in the case of H, it was also clear that a failure to consider distribution resulted in problems later in the development process, as a result of inadequate protection.

### 9.8 Design Agency and Supplier Input

#### 9.8.1 Supplier Input

Prior research has highlighted the important role of supplier-customer relationships in NPD (Petersen et al., 2003; Chung & Kim, 2002; Lambert, 2008; Wynstra et al., 2010): confirmed in the context of the food industry (section 4.6). The phase two findings have provided new insight into the links between the level at which packaging development was focused and external supplier collaboration. This in turn influenced the degree of meaningful supplier input (Leifer et al., 2000).

The focus of skin deep projects, primarily on changes to the graphics and text, resulted in suppliers having little involvement in development. The relationship was primarily cost transaction in nature. Body modification projects involved suppliers to a greater extent, particularly within the technologically focused Project C. However, the supplier’s role was most significant within each case involving format change, which consistently revealed their integral involvement. Each technology was developed collaboratively. Furthermore, as Biemans (1991) suggests, suppliers were key to the generation of new ideas.

The involvement of suppliers was influenced by two key factors: the orientation of each firm’s packaging team; and (within NPD projects) their involvement in development. With respect to the packaging team, within DarbysOwn, its technical capability, alongside the drive of the innovation manager, facilitated frequent discussions of possible technologies. This was also evident, albeit to a lesser extent, within Orchids. Orchids’s team were more reliant on external expertise, due to lower levels of internal technical capability. By contrast, the emphasis of CrispChips
packaging team constrained supplier involvement. Their discussions were held almost solely with existing suppliers, and focused primarily on negotiating contracts, cost improvements, and materials changes. Finally, within Newway, there was also evidence that suppliers were involved to a lesser extent within development. Suppliers were commonly approached once the format had been established.

Product focused projects revealed that the packaging suppliers’ level of involvement was also influenced by the decisions of the core NPD team. Where this team did not involve packaging staff within the development of a product, instead choosing to specify the format themselves, this was frequently associated with lower levels of supplier input. Suppliers were contacted to cost the set format. Similarly, where the team recruited the expertise of a design agency in development, this had a similar effect (see 9.8.2).

The above findings confirm that the involvement of packaging suppliers was greater in format changes. Within each case, the analysis consistently identified the integral involvement of the supplier. However, it is worth noting that the significance of packaging suppliers may reflect the broader role which they perform in own brand NPD, as retailers generally undertake less technical development (Francis et al. 2008; Francis et al., 2006).

9.8.2 Design Firm Input

Design agencies were involved in six of the projects. Their involvement, however, differed across the projects.

Within projects I, L, and J, skin deep or body modification emphasis resulted in responsibility being handed to design firms. The focus of development was on the core product, and packaging was primarily seen as a design task, resulting in the supplier having little meaningful input. Similarly, in Project K, whilst materials were discussed with suppliers, packaging was largely handled as an aesthetic design task, with the agency being responsible. Project I highlighted that this approach, where responsibility was placed with the agency, carried with it the risk that technical issues would not be sufficiently addressed.

Within Projects E and G, suppliers played a different role. The skills held within the design firms were effectively used to compliment internal capabilities. This also
resulted in suppliers having a greater level of input, and new technologies were explored as a result.

Linking back to Proposition 6, skin deep or body modification level change results in a greater propensity to collaborate with design firms. It has also been found that the approach adopted by these firms can be described as orientated towards graphic design: ideas were primarily driven by the creativity of staff and input of consumers. They tended to overlook the possibilities of technical change, further reinforcing orientation towards skin deep or body modification level change. Linking back to the myopic view of packaging (section 9.3.3), this finding indicates that agencies define packaging development in aesthetic design terms.

9.9 Framework

The preceding sections have provided evidence of the validity of the new framework presented within this thesis (Figure 9.1). This summarises the study’s key findings, providing a new lens through which to understand the management of packaging. Its unique contribution is that it adopts a new perspective on packaging, beyond the skin deep and body modification levels at which prior research in marketing has focused.

The centre of the framework captures the three different levels at which packaging development may be focused: skin deep, body modification, and format change. The boxes placed around this central element of the framework display the factors influencing the level of focus (along the top and left), and those that result from the focus (to the right and bottom of the figure). This is depicted in the arrows.

The factors identified to the left of the framework, within the dotted lines, encapsulate the key factors within the firm influencing the level of development. The larger, upper left box, draws, and builds, upon the existing literature on absorptive capacity, product champions and heavyweights. These three elements interact; and together, define technical packaging absorptive capacity. This results from:

• The incorporation of a packaging champion
• Levels of packaging absorptive capacity
• The incorporation of staff with industrial packaging design capability

The level of capability is then linked, to the right, with the role of the various members of the NPD team. This owes to the point that, in projects, packaging development may be allocated to a packaging specialist or another member of the team. Within
this box, the role of buyers is also identified. The final factor, with respect to the NPD team, is that of key decision-makers’ perceptions of flexibility in the production process, which itself is influenced by packaging absorptive capacity. The combination of these factors dictates the level of orientation of packaging development.

The second key aspect of the framework, indicated towards the top, is the role and power of the retailers. This was identified as a key factor, particularly with respect to branded NPD, influencing the level at which development focused. In particular, it led to an emphasis on body modification and skin deep levels of change, due to the lower levels of risk associated.

To the right of the framework, the key inputs of external partners are captured. This reflects the fact that orientation towards skin deep or body modification levels of change results in a greater propensity to collaborate with design firms; whereas suppliers play a greater role within format changes. The dotted arrow also indicates that the degree to which the supplier is incorporated has an important influence on their own R&D (as uncovered in Phase 1).

The final factor (indicated in the lowest box) is the role of the consumer. This captures the findings that within skin deep or body modification levels of development, the consumer was found to play a significantly greater role than within format changes.

9.10 Summary
The analysis presented within this chapter has provided an overview of the findings of the second phase of this research, highlighting evidence of the validity of the framework and typology presented in Chapter six. The cases have revealed that the focus of packaging development is influenced by each of the factors identified within the framework and propositions. As a result, the ability of a firm to uncover new opportunities for format change is dictated by each of the factors captured within this framework.