

The packaging of tobacco products

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The Centre for Tobacco Control Research
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Registered charity in England and Wales (1089464)
and Scotland (SC041666)

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About the Report

The report explores the role that packaging plays for tobacco products. It was written by Allison Ford at the Centre for Tobacco Control Research at the University of Stirling. The Centre is core funded by Cancer Research UK. Allison is also a member of the UK Centre for Tobacco Control Studies. Funding to UKCTCS from the British Heart Foundation, Cancer Research UK, the Economic and Social Research Council, the Medical Research Council and the National Institute of Health Research, under the auspices of the UK Clinical Research Collaboration, is gratefully acknowledged.

Centre for Tobacco Control Research
University of Stirling

March 2012



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Outline of report

This report considers packaging from a wider marketing perspective, and how it is perceived and used by the tobacco industry. In addition, new research from the UK exploring young people's perceptions of both branded and plain packaging is presented. The report provides:

1. A summary of the marketing function of packaging for consumer goods, including tobacco products
2. A review of research exploring tobacco industry documents in respect to tobacco packaging
3. A summary of developments in tobacco packaging in the retail press from 2009 to 2011
4. Focus group research exploring young people's perceptions of packaging for consumer products, including tobacco packaging and also plain packaging

Key findings

Packaging: The multifunctional marketing tool

Packaging is an effective marketing medium which helps to build consumer relationships through possession and usage. Packaging innovation, design and value packaging are used to promote the product, distinguish products from competitors, communicate brand values and target specific consumer groups. These packaging strategies, together with the visual and structural aspects of packaging design, such as colour, size and shape, influence consumer perceptions and purchase and usage behaviour, and give packaging an important role at point-of-purchase and also post-purchase. Packaging also has a close relationship with the product.

Packaging: A tobacco industry and retail perspective

Tobacco packaging has multiple functions for tobacco companies, beyond that of brand identification, navigation and selection. It is used to promote the product using the same strategies employed by other consumer goods manufacturers, specifically packaging innovation, design and value packaging. Packaging is viewed as a key marketing tool for tobacco companies, according to both their own internal documents and also the retail press. Packaging has a wider reach than advertising and is the most explicit link between the company and the consumer.

Perceptions of packaging and plain packaging: A focus group study

Research exploring young people's perceptions of tobacco packaging found that youth appear to be attracted to tobacco packaging design. Branded packaging presented positive user imagery and functional and emotional benefits to young people. Conversely plain cigarette packaging was perceived as unattractive, reduced emotional attachment to the packaging and enforced negative smoking attitudes among young people. Plain packs with different shapes were also found to influence young people's perceptions, suggesting that a standard shaped plain pack is most effective at reducing the ability of packaging to communicate with young smokers and potential smokers.

Chapter I: Packaging as a marketing tool for consumer goods

1.1 General introduction

This chapter considers the wider marketing literature to understand the role that packaging has for consumer goods, including tobacco products¹. Packaging is often alluded to as the fifth 'p' of the marketing mix as it is an effective marketing medium for all consumer products, and one which helps build consumer relationships through possession and usage. Common packaging strategies to promote the product, distinguish products from competitors, communicate brand values and target specific consumer groups include innovative, image and value packaging. These strategies, combined with the visual and structural aspects of packaging design, such as colour, size and shape, influence consumer perceptions and purchase and usage behaviour, and give packaging an important role at point-of-purchase and also post-purchase. Packaging also has a close relationship with the product, influences perceived product attributes, and is a key representative of the brand.

1.2 Defining the core functions of packaging

Packaging is designed to contain, protect, dispense, transport and store the product, and to have functional appeal for consumers and businesses. However, the true scope of packaging is much broader than this as it also identifies and communicates the qualities of the product, projects brand values and differentiates the product from its competitors. Packaging does this aesthetically, helping to appeal to different demographics and social groups (KLIMCHUK & KRASOVEC 2006).

1.3 Packaging: A brief history

Key developments in packaging help to understand why packaging is so important for consumer goods companies. Packaging was first used as a strategic tool for consumer goods from the 1920s (KLIMCHUK & KRASOVEC 2006) although the strategic use of packaging for tobacco products can be traced back to the late 19th century (THIBODEAU & MARTIN 2000). By the 1930s, advertising agencies were providing packaging services which were concerned with the technical practicalities of packaging, such as manufacturing, printing, labelling and shipping, and also the aesthetic appeal of packaging and associated psychological values. Using packaging to increase the visual appeal of products and convey emotional benefits to the consumer is, therefore, a long established tradition.

The etymology of packaging as the '*silent salesman*', a term used to refer to the ability of packaging to heighten appeal, aid purchase decisions and help drive the sale in-store (SARA, 1990) can be traced back to the late 1940s, coinciding with the growth of self-service stores and the marked change in how consumer products were sold (KLIMCHUK & KRASOVEC 2006). It was during this time that products began to come pre-packaged, rather than being weighed and packaged by a shopkeeper, largely because with increasing competition it became clear that the key to product marketing was having quickly identifiable brands and that packaging was central to this.

By the 1960s, typographical advances and the continued development of industrial processes meant that more sophisticated graphics, materials and structures could be incorporated into packaging design. These developments made it easier for packaging to be used to communicate visual personality and also develop brand image, which was increasingly being recognised as helping to sell the product. It was also during this period that market segmentation became a greater consideration for packaging, and by the 1970s packaging was a well defined marketing tool.

1. This chapter is based upon Ford A, Moodie C, Hastings (in press). The role of packaging for consumer products. Understanding the move towards 'plain' tobacco packaging. *Addiction Research & Theory*.

1.4 Packaging as marketing

Traditionally, in the management and academic literature advertising was considered key to marketing, in particular, the return on investment and impact on brand values (PRONE 1993). However, from the 1970s writers started to acknowledge the growing importance of packaging. Firstly, this shift came from marketing practitioners (SHORT 1974; NICKELS & JOLSON 1976; HOWE 1978; SELAME 1985) and latterly by academics (UNDERWOOD & OZANNE 1998; UNDERWOOD 2003). For instance, in the late 1970s Howe pointed out that:

'Recently I've read and heard of a trend away from paid media advertising... if advertising budgets are decreased, well-planned and well-designed packaging will be able to sell the product from the shelf.'

HOWE 1978

This move away from advertising and towards packaging can be understood for at least two reasons. Firstly, increasingly fragmented media channels may make it more difficult to reach large audiences with advertising, but not packaging. Secondly, in comparison to advertising, packaging is better positioned to strengthen brand values (CRAMPORN 2001) and influence brand perceptions (HOFMEYER & RICE 2000). Prone (1993) suggests that packaging redesign can yield a higher return on investment than not only advertising, but all forms of marketing. In recognition of this, it has been suggested that packaging should be the fifth 'p' of the marketing mix model as it is the only element intertwined with all of the other 'p's (product development, pricing, placement and distribution, promotion) and it plays a key role in all of these strategic marketing areas (SHORT 1974; NICKELS & JOLSON 1976; HAWKES 2010). Indeed, highlighting the importance attached to packaging, it is positioned as a standalone marketing mix element, the fifth 'p', for British American Tobacco (BAT 2009).

For those who criticise and reject the traditional 4p's marketing management paradigm and instead favour relationship marketing (GRÖNROOS 1994; CONSTANTINIDES 2006), packaging is still viewed as extremely important, and one of the building blocks to successful consumer relationships. Fournier (1998) explains that consumer-brand relationships are valid at the consumer's lived experience of consumer goods. Packaging can play a key role in building these relationships due to the feelings and experiences arising from possession and usage (UNDERWOOD 2003). For example, from a very young age children build relationships with branded breakfast cereals, not from advertising exposure but from their interaction with packaging at breakfast and snack times (MCNEAL & JI 2003).

1.4.1 *The role of packaging at point-of-purchase and post-purchase*

Both these schools of thought, therefore, highlight the multifaceted nature of packaging. Packaging has the advantage of being able to influence consumers both within, and outside, the retail environment. Möller (2006) explains that at a transactional level packaging attracts attention on the shelf, aids in product differentiation and positioning, is a source of competitive advantage, has a role to play in consumer decision making and influences purchase. Löfgren (2005) describes the influence that packaging has at the point-of-purchase (POP) as the *'first moment of truth'*. The additional key advantage of packaging, however, is its ability to influence usage and consumption after purchase, or at the *'second moment of truth'* (LÖFGREN 2005). Winning at the second moment of truth is crucial for consumer repurchase and longer term engagement with the brand. This is the stage when the functional benefits and usability of packaging are realised.

Increasingly, packaging design efforts are becoming tactical to optimise opportunities at both POP and post-purchase (ROPER & PARKER 2006). Common strategies to promote the product, distinguish products from competitors, and communicate brand imagery and values include innovation, graphical design and limited editions, and value packaging.

1.4.2 Packaging strategies

1.4.2.1 Innovation packaging

Jugger (1999) argues that the best way to obtain competitive advantage in an overloaded consumer goods market is through innovation in packaging. Innovative packaging is thought to change product perceptions and create new market positions (RUNDH 2005) and represents a shift in focus from graphical to structural design (VAN DEN BERG-WEITZEL & VAN DE LAAR 2006). Innovation can arise due to a real concern for safety, for example, childproof packaging for pharmaceuticals (ARMSTRONG AND KOTLER 2005) or from the development of new materials and processes. Plastics, in particular, provide continuing opportunities for new packaging forms (KLIMCHUK & KRASOVEC 2006). For instance, the glass bottle for Heinz Tomato Ketchup was a source of frustration for consumers due to difficulty in getting the sauce from the bottle. The subsequent squeezable plastic bottle solved this issue and is now a category norm. However, the primary driver for innovative packaging is usually to increase sales via brand promotion. For instance, the energy drink No Fear Extreme Energy, which is packaged in a re-sealable can, achieved a 524% growth between November 2010 and January 2011 (CONVENIENCE STORE 2011).



As an example of successful pack innovation for a tobacco product, tobacco company Gallaher attributed a substantial rise in sales (46.5%) for Benson & Hedges Silver in 2006 to an innovative side opening sliding pack (THE GROCER 2007) (pictured). Other recent examples of innovation in tobacco packaging include new pack shapes such as slim 'perfume' packs, new seal 'technology' for roll your own (RYO) tobacco (WALKER 2009a), and also textured packaging, such as the Silk Cut 'touch' pack (OFF LICENCE NEWS 2010a). Going beyond the visual appearance of packaging, tactility is a creative way of adding to the sensory experience of products (BLOCH 1995). Within the alcohol category, Heineken cans now feature 'sensory elements' such as embossments, strategically placed indents and tactile ink (COLLENETTE 2010). Another sensory ingredient being developed, this time within can manufacturing, is smell. One European packaging company has developed an 'aroma-can', which includes aroma molecules on the can surface. When activated, the molecules release an aroma for the drinker. The 'aroma-can' could be used, for example, to include a chocolate aroma in a coffee or milk drink (GOLDSTEIN 2010). Given the recent innovation for cigarette packaging, and reference to perfumed cigarettes in tobacco industry marketing documents (CDP 1995a), the tobacco industry may elect to introduce fragranced cigarette packs to market at some stage.

1.4.2.2 Limited edition packaging

Increasingly, limited edition packaging, usually available only for a short period of time, is being used to engage consumers with brands (ROPER & PARKER 2006). Events such as brand anniversaries, special public occasions and seasonality provide marketers with opportunities to develop new edition packaging which can help reinforce a brand's heritage, or spark or maintain interest in the brand. Linking limited edition packaging with such events is not compulsory however. For example, Procter and Gamble recently collaborated with a fashion designer to create limited edition packaging for its Olay Complete Care Touch of Foundation range, simply to generate attention (FORRESTER 2010).

The use of limited edition packaging for tobacco products is now commonplace, exemplified by the fact that there were at least 18 limited edition packs released between 2009 and 2010 for cigarettes, RYO tobacco and cigars (described in more detail in Chapter 2), compared to a single example between 2002 and 2003, for Hamlet Cigars (FORECOURT TRADER 2003). This was predicted, in the late 1990s, by a marketing agency which suggested that the tobacco industry might respond to the proposed advertising ban in the UK by turning their attention to pack design, and increasing the use of limited edition packs (VICKERS & VICKERS 1997). Limited edition designs typically use on-pack graphical design to



create favourable brand images (pictured) although they sometimes encompass innovative aspects too. Often available with multiple designs in a set, these editions are a yearly occurrence for certain brands, with recurring themes such as Sovereign's 2009 'Cityscapes' (COLLENETTE 2009) and 2010 'City Lights' (OFF LICENCE NEWS 2010b). Limited editions can hold particular appeal for those who value exclusivity and rarity, and have the ability to turn items into collectables (HAMPSHIRE & STEPHENSON 2007). A number of design agency directors have highlighted the potency of limited edition packaging, which can increase the number and speed of sales and also have a lasting impact on brand perceptions once they have sold out (TOBACCO JOURNAL INTERNATIONAL 2009; ELLIOT 2010).

1.4.2.3 Value packaging

Packaging can also be used to communicate value. Price marked packs (PMPs), increasingly being offered in convenience stores, is a promotional strategy which sends out a clear value for money signal (pictured). In a survey conducted at the POP 48% of shoppers said that PMPs encouraged them to purchase their chosen product (THE GROCER 2011). Food company Baxters recently announced year round PMPs for their products as research shows that sales of products within PMPs are 66% higher than sales of products within standard packaging (TALKING RETAIL 2011).

As an example of the successful use of PMPs for tobacco products, market share for cigarette brand Sterling increased from 5.0% to 6.1% within the four months following a PMP promotion (THE GROCER 2009a). The reason for this appears to be that many smokers believe that PMPs indicate a special promotional price, even when the price shown is the recommended retail price, because of the style and prominence of the message (MUSTOE, MERRIMAN, HERRING & LEVY 1996). PMPs can also be used as a tactical measure to offset the effects of Budget increases. PMPs bought by retailers before tax increases must be sold at the price shown and therefore, by default, become a special offer price.



1.4.2.4 Packaging strategies target specific consumer groups

These aforementioned packaging strategies enable marketers to align brands with target groups of consumers. Brand values are inferred from packaging design and this has an impact on purchase intent, particularly when brand values are congruent with personal values (LIMON, KAHLE & ORTH 2009). As personal values stem from membership of cultural and peer groups, careful attention is paid to which values are important to the target group (de Chernatony 2006). Tobacco industry documents show clear segmentation with regards to groups such as young people and lower social classes (LOWE HOWARD-SPINK 1997; WAKEFIELD, MORLEY, HORAN & CUMMINGS 2002). The values of such groups are monitored to allow packaging strategies to fit in with any changes. For instance, value packaging becomes more prominent in times of economic pressure (LOWE HOWARD-SPINK 1996).

In respect to innovative and limited edition packaging, they are more likely to appeal to individuals who place greater significance on the visual aesthetics of design, and this innate sense of design has been shown to have a strong effect on the perceived attractiveness of packaging, brand choice and purchase intent (ORTH, CAMPANA & MALKEWITZ 2010). These

limited edition designs and pack innovations are often appealing to youth, who are drawn to novelty and the desire for something 'new' (WAKEFIELD ET AL. 2002).

Packaging, therefore, has the potential to increase product sales by tailoring its design to consumer preferences. On a psychological level, growing academic attention has been paid to how the use of visual design factors, or *peripheral cues* (WANSINK & VAN ITTERSUM 2003), such as colour, shape and size of packaging, can have inherent meaning for consumers (Bottomly & Doyle 2006) and also affect their perceptions, brand impressions, and purchase and consumption behaviour.

1.5 The influence of packaging design features

1.5.1 Colour

Colour psychology has shown that people attach meanings and emotionally respond to colour. For example, cross culturally, blue, green and white are associated with gentleness and calmness, while black and red are strong, potent colours (ADAMS & OSGOOD 1973; MADDEN, HEWETT & ROTH 2000). Because of its universal effect, packaging designers often consider colour to be the most influential aspect of packaging design (KLIMCHUK & KRASOVEC 2006; MEYERS & LUBLINER 1998). It is a key element of brand identity (KELLER 2008) and can break through the overload of competing products and information at the POP (GARBER, BURKE & JONES 2000). There is an element of colour congruity among consumer product packaging, and colour is routinely used to differentiate product attributes such as flavour. Consumers have become so accustomed to this use of colour that their responses to colour cues are automatic (MEYERS & LUBLINER 1998). Packaging colour is also routinely used to portray brand imagery (MADDEN ET AL. 2000), gender suitability (SARA 1990) and, in the case of tobacco, product strength (HAMMOND, DOCKRELL, ARNOTT, LEE & MCNEILL 2009).

1.5.2 Shape

Packaging shape has been found to be important for three main reasons:

1. it can result in strong volume perception biases among consumers (YANG & RAGHUBIR 2005);
2. consumers report shape as one of the aspects of packaging most likely to encourage them to buy the product (SILAYOI & SPEECE 2007); and
3. product and symbolic values are thought to be inferred from package shape and form (CREUSEN & SCHOORMANS 2005). For instance, Van den Berg-Weitzel and van de Laar (2006) highlight that packaging design of whisky bottles, which tend to be angular in shape, with heavy, course, thick and broad forms, represent masculinity and robustness. Silk Cut superslims, shown below, instead communicate femininity, elegance and slimness through the tall and thin pack shape (MOODIE & FORD 2011).

1.5.3 Size

Package size has been shown to have an impact on consumption behaviour (WANSINK 1996; WANSINK & PARK 2001). In a study exploring different packaging sizes for spaghetti and oil, consumers were found to use more of the product when it was presented to them in a larger package (WANSINK 1996). This is explained in part by the consumer being less concerned about running out of the product. In another study, it was found that even when the product, in this case popcorn, was deemed unfavourable in taste, 53% more product was consumed from the larger container, suggesting the dominance of size over product quality on consumption (WANSINK & PARK 2001). This has important implications for the larger tobacco pack sizes on offer, such as the increasing availability of 50g rather than 25g RYO tobacco packs (OFF LICENCE NEWS 2010c) and may have repercussions for tobacco consumption. Offering products in different pack sizes, an additional value strategy, can also impact upon purchase behaviour. Consumers typically believe unit costs vary depending on package size, with a lower price per unit in larger packages (WANSINK 1996),



and even small changes in packaging size can result in increased sales and profits (RAGUBIR & GREENLEAF 2006).

1.6 Packaging as product: The impact on product attributes

Cues such as the ones previously outlined can have a significant impact on perceived product attributes. The '*establishment of [a] colour code*' for tobacco products has led to colours such as white and light blue being used on packaging to reinforce perceptions of weaker product strength (THE RESEARCH BUSINESS 1996) and both smokers and non-smokers erroneously associate lightly coloured packages with weaker product strength and reduced harm (HAMMOND ET AL. 2009; MOODIE, FORD, MACKINTOSH & HASTINGS IN PRESS). Package size can also affect perceptions of product healthiness, with products consumed from a small package perceived as healthier than the same product from a large one (WANSINK & PARK 2001). This applies to tobacco products as well, with young adult female smokers perceiving a small, narrow perfume type pack as less harmful than other larger packs containing the same quantity of cigarettes (MOODIE & FORD 2011).

Packaging is also an inherent part of the product (HAWKES 2010). Hawkes argues that as the package contains the message of the product, changes to packaging, through regulation for example, could equate to changing the essence of a product. It gives credence to the idea that packaging may be an intrinsic product cue which, when changed, can alter the nature of the product. In support of this, children between three and five years old were found to prefer the taste of MacDonald's food and drink when packaged in the brand's regular packaging rather than plain white packaging (ROBINSON, BORZEKOWSKI, MATHESON & KRAEMER 2007). Similarly, Allison and Uhl (1964) found that beer drinkers could discern no taste differences between different brands of beer presented in plain brown bottles, yet when the same bottles displayed branded labels, overall taste ratings improved significantly. Just as changing the packaging for food and alcohol products by removing all branding has been found to alter taste perceptions, the removal of branding from tobacco packaging, aside from brand name, has been found to do likewise (MOODIE, MACKINTOSH, HASTINGS & FORD 2011).

1.7 Packaging as branding

While packaging has a close relationship with the product, being the first observable direct signal of a product's underlying traits which sets consumers expectations (HONEA & HORSKY IN PRESS), for Keller its most important role is in developing brand meaning. Keller argues that packaging contributes to brand associations and is an important element of the brand which constitutes its identity (KELLER 2008). Furthermore, it is argued that it is the mix, or gestalt, of all the packaging design elements working together, which communicates brand imagery (ORTH & MALKEWITZ 2008).

De Chernatony (2006) explains that brands are complex offerings that are conceived in brand plans, but ultimately reside in consumers' minds. When consumers think of brands they often automatically associate packaging with the brand (CRAMPORN 2001; KELLER 2008). Marketers often argue that packaging is what consumers tend to know best about the brand and this can be reassuring for them (CRAMPORN 2001; MEYERS & LUBLINER 1998). Indeed, Schlackman and Chittenden (1986) argue that packaging design features such as colour or shape can be more important than brand name for identification.

1.8 Conclusion

Packaging has long been recognised as a powerful and effective marketing tool across consumer products. Packaging strategies such as innovation, design (including limited editions), and value packaging have a clear promotional and segmentational purpose, while individual design elements such as colour, shape and size can influence consumer responses and purchase and consumption behaviour. With so many ways in which packaging can communicate with consumers, this helps explain why this marketing medium is of such importance to consumer goods companies.

Chapter 2: The packaging of tobacco products – the tobacco industry perspective

2.1 General introduction

To gain an insight into how the tobacco industry perceives tobacco packaging, this chapter presents findings from academic research that has examined tobacco industry documents. Industry documents originally intended only for internal use have been made publicly available through litigation and settlement agreements in the United States and Canada. As a result, millions of documents from the main global tobacco companies have been released since the 1990s, including research reports, strategy documents and memoranda, both from the industry and commissioned outside agencies. A smaller, but no less important, set of UK documents was obtained through the House of Commons Health Select Committee investigation into tobacco industry conduct, including marketing practices. This gave access to the internal documents of the UK industry's main advertising agencies. While the tobacco industry considers the documents outdated and therefore irrelevant, they nevertheless constitute a valuable resource which outlines tobacco industry past activities and motivations, and prospective plans (BERO 2003; MACKENZIE, COLLIN & LEE 2003). Their significance to current public health policy is widely noted (HIRSCHHORN 2002; BERO 2003; MACKENZIE ET AL. 2003; CARPENTER, WAYNE & CONNOLLY 2005).

2.2 Academic research using industry documents

Industry documents are now housed in searchable electronic archival databases on websites maintained by individual tobacco companies or the tobacco control community (MACKENZIE ET AL. 2003). While these documents cover a wide range of issues, here the focus is on academic research that considers those related to packaging. Most of this research describes the systematic search methods employed to identify relevant documents. Searching by key terms (HASTINGS & MACFADYEN 2000; WAKEFIELD ET AL. 2002), snowball sampling (CARPENTER ET AL. 2005), or 'request for production' codes, which relate to specific litigation goals (CUMMINGS, MORLEY, HORAN, STEGER & LEAVELL 2002), all provide a means of relevant subject access. While there is evidence of documents being destroyed, concealed or withheld (LIBERMAN 2002; MUGGLI, LEGRESLEY & HURT 2004), in particular those relating to youth marketing (CUMMINGS ET AL. 2002), they nevertheless shed light on how the industry operates and provides greater understanding of the importance attached to packaging.

2.3 Key findings

2.3.1 *Industry research on packaging*

The documents show substantial investment in packaging design research from as early as the 1950s (WAKEFIELD ET AL. 2002). A range of market research techniques are employed including focus groups, market surveys and use of tachistoscopes to measure eye-movements (WAKEFIELD ET AL. 2002; POLLAY 2007). The packaging design process from initial concept through to consumer pack testing is both complex and time-consuming with minute pack design elements critically examined along with consumer preferences (CUMMINGS ET AL. 2002). As a result the tobacco industry carefully aligns brands and packaging designs with segmented groups of consumers.

Document analyses have identified two groups that have been especially targeted through packaging design, specifically young people and females. However, packaging speaks to both genders and all age groups, and to non-smokers, starters, established smokers or those wanting to quit.

2.3.2 *Packaging as a communications and promotional tool*

Industry documents highlight that while at the POP packs are designed to create a strong visual impact, which increases when brand families are displayed together (WAKEFIELD ET AL. 2002), the key value of packaging is as a communications and promotional device (HASTINGS & MACFADYEN 2000; WAKEFIELD ET AL. 2002; BERO 2003).

'the easiest way to communicate with current smokers is through the packet'

(CDP 1995B, IN MOODIE & HASTINGS 2011).

All aspects of the pack, including the pack outer, cellophane, tear tape and inner cards, maximise the ways in which the pack itself can be used to communicate with consumers (MAWDITT 2006, IN FREEMAN, CHAPMAN & RIMMER 2008).

'We want to look at making the current L&B campaign work by using the pack outer as our advertising medium... They want to concentrate on this area alone as it will become very important after the ad ban'

(MUSTOE MERRIMAN HERRING & LEVY 1999, IN HASTINGS & MACFADYEN 2000).

Restrictions on traditional marketing mediums accentuate the importance of packaging as it becomes one of the last consumer marketing vehicles.

'If your brand can no longer shout from the billboards, let alone from the cinema screen or the pages of a glossy magazine... it can at least court smokers from the retailer's shelf, or from wherever it is placed by those already wed to it'

(EINDHOVEN 1999, IN FREEMAN ET AL. 2008).

However, packaging has always been regarded by the industry as a promotional device in itself and one which is inextricably linked to the brand.

'Benson & Hedges Filter is defined first and foremost by the GOLD PACK, which quintessentially is the brand'

(COLQUHOUN ASSOCIATES 1998, IN MOODIE 2010).

Packaging redesign is often the first point of call for rejuvenating a brand's image (ANDERSON, HASTINGS & MACFADYEN 2002) and the right packaging is a key component in the success of a new brand.

'The pack is pivotal to this - the pack, and in particular its bright yellow colour, is the distinguishing element of the new brand'

(M&C SAATCHI 1999, IN HASTINGS & MACFADYEN 2000).

2.3.3 Sensation transfer

The industry has explored what influences consumers' quality and strength perceptions (BERO 2003). Pack designs can be used to communicate lower tar and milder tobacco, which may lead some consumers to believe the product within carries a reduced risk of harm (HASTINGS & MACFADYEN 2000; WAKEFIELD ET AL. 2002). The following quotes illustrate how particular colours, such as white and blue, are used for this purpose.

'Lower delivery products tend to be featured in blue packs. Indeed, as one moves down the delivery sector then the closer to white a pack tends to become. This is because white is generally held to convey a clean healthy association'

(PHILIP MORRIS 1990, IN WAKEFIELD ET AL. 2002).

'Red packs connote strong flavor, green packs connote coolness or menthol and white packs suggest that a cigaret [sic] is low-tar. White means sanitary and safe. And if you put a low-tar cigaret [sic] in a red package, people say it tastes stronger than the same cigaret [sic] packaged in white'

(KOTEN 1980, IN POLLAY & DEWHIRST 2002).

Colour is a key vehicle for this, but pack features such as graphics, fonts, shape and texture also play a part (DIFRANZA, CLARK & POLLAY 2002).

2.3.4 *Packaging for young people*

Several document analyses suggest that young people are a consideration in packaging design. For instance, Cummings et al. (2002) describe how packaging is developed to appeal to new smokers, notably teenagers, through its size, colour and design. Wakefield et al. (2002) found documents that show that tobacco companies constantly monitor packaging to ensure the brand is appealing to youth. Devlin, Eadie and Angus (2003) also highlight that packaging has been used as part of a broader marketing strategy to reflect youth lifestyles. Industry documents provide strong evidence of the importance of recruiting new smokers, due to high brand loyalty to the first brand smoked and low rates of brand switching (POLLAY 2000).

These quotes highlight why younger people are so important to the industry.

'It is important to know as much as possible about teenage smoking patterns and attitudes.... The smoking patterns of teenagers are particularly important to Philip Morris... it is during the teenage years that the initial brand choice is made'

(JOHNSTON 1981, IN PERRY 1999).

'Younger adult smokers have been the critical factor in the growth and decline of every major brand and company over the last 50 years. They will continue to be just as important to brands/ companies in the future'

(BURROWS 1984, IN PERRY 1999).

Within industry documents more sanitised language can be found from the 1980s onwards to refer to the youth market (PERRY 1999; HASTINGS & MACFADYEN 2000; CUMMINGS ET AL. 2002). From this time explicit references to the youth market were replaced by the term 'young adult smoker', intended to imply the 18-24 age group.

'From time to time when describing market categories and target audiences we use references such as 'young smokers', 'young market', 'youth market', etc... when describing the low-age end of the cigarette business please use the term 'young adult smoker' or 'young adult smoking market'... these terms should be used in all written materials in the future'

(PITTMAN 1975, IN CUMMINGS ET AL. 2002).

Packaging is used by the industry in three ways to target 'young adults': 1) through imagery; 2) through communicating value; and 3) by offering something new.

2.3.4.1 *Image*

One of the main strengths of packaging is the ability to communicate with consumers and reinforce brand imagery (WAKEFIELD ET AL. 2002). Brand imagery concerns all the associations that consumers connect with the brand. These associations, or beliefs, are formed from exposure to many facets of the brand, and include the users' associations with the product, brand name, price or distribution channel (BATRA & HOMER 2004). Packaging is seen as one of the most important vehicles for this.

'pack design must still be regarded as the principal foundation for the development of brand imagery'

(MILLER 1986, IN MOODIE & HASTINGS 2011).

Youth in particular are viewed as most susceptible to the images portrayed through marketing and much attention has been paid by the tobacco industry to understanding youth culture. For example, a recommended starting point for a new youth brand was:

'A careful study of the current youth jargon, together with a review of currently used high school American history books and like sources for valued things might be a good start at finding a good brand name and image theme'

(TEAGUE 1973, IN PERRY 1999).

Image is seen as crucial to the success or failure of a brand with young smokers (CUMMINGS ET AL. 2002) and much attention is paid to ensuring that the pack communicates the right image. The industry is aware that on-pack branding can add aspiration and coolness (HASTINGS & MACFADYEN 2000) and that fonts and typeface can add to this image (O'LEARY 1987, IN DIFRANZA ET AL. 2002).

Similarly, good packaging can represent a better class of product reflecting youth desire for maturity, independence and success (WEN ET AL. 2005). These brand images developed through packaging are then transferred to the user via public displays of the pack. Through keeping their packs close by and revealing them countless times daily, smokers take on some of the brand personality and identity (WAKEFIELD ET AL. 2002). This is why the pack is often termed a 'badge' and why its advertising role extends far beyond that of POP.

'Cigarette packs are still considered to be badges, albeit that the cigarettes themselves seem to be losing a large amount of the glamour and aspiration that used to be associated with them'

(M&C SAATCHI 1996, IN HASTINGS & MACFADYEN 2000).

2.3.4.2 Value

The tobacco industry argues that the price of a brand is important for younger adult smokers. While industry documents show this in part to be true, they reveal a conflict between price and imagery given young smokers' desire for higher priced popular premium brands:

'some evidence suggests that younger adult smokers are interested in price, but unlikely to adopt a brand whose only hook is price... a price-value brand would need a conspicuous second 'hook' to reduce possible conflict between younger adults' value wants and imagery wants'

(BURROWS 1984, IN CUMMINGS ET AL. 2002).

As such, promotional strategies which add value to premium brands can have an impact on young smokers. Price-marking, having the price on the pack, usually within a brightly coloured flash, is intended to communicate value for money (MOODIE & HASTINGS 2011). Packaging brands in more affordable size offerings is another value strategy. Not only does smaller pack size reduce the lay-down price – the actual price paid – it provides a cheap route to aspirational brands (ANDERSON ET AL. 2002). UK documents reveal that 10 packs are potentially how 'new entrants' enter the market (HASTINGS & MACFADYEN 2000).

'The higher penetration of regular 10s buying amongst young adult smokers may be a function of the greater acceptability of 10s packs by this age group of smokers and the fact that they are image conscious. As the laydown prices of cigarettes have increased, the younger adult smokers may have traded down to a 10s pack of a premium brand or, chosen to buy a premium 10s pack when they entered the market, rather than buying into cheaper 20s pack of an economy brand'

(MARKETING SERVICES 1997, IN HASTINGS & MACFADYEN 2000).

'Whilst this data is not completely reliable it does reinforce the picture from old BJM data in highlighting the role of the 10s pack amongst young adult smokers and potentially new entrants to the market'

(MARKETING SERVICES 1997, IN HASTINGS & MACFADYEN 2000).

A survey of males aged 18-29 for Philip Morris also outlined the possible impact of offering packs containing 14 cigarettes rather than the standard 10 and 20 cigarettes. This is explored in more detail in chapters three and four.

'14s has the potential to attract young smokers'

(PHILIP MORRIS 1993, IN WEN ET AL. 2005).

2.3.4.3 *The importance of something new*

The concept of novelty is also highlighted in industry documents as being important to consumers, and particularly younger groups. Wakefield et al. (2002) note that tobacco companies continually monitor young people's perceptions of packaging to check it is not perceived as outdated or targeting an older age group. Packaging redesign is often the main strategy employed to communicate that the brand is modern and fresh. Innovation in particular is thought to be particularly appealing for young smokers and new pack ideas are often tested with this target group in mind. A spokesperson from a product innovation group at a Philip Morris marketing meeting described research investigating an oval pack which was found to be:

'new, original, sensual and striking. Test concluded: pack has tremendous appeal among young smokers'

(PHILIP MORRIS 1990, IN WAKEFIELD ET AL. 2002).

Other Philip Morris documents explain the appeal of 'new' for younger people:

'Once exposed to 'innovative', especially young adults see their current packaging as dated and boring... draws attention (jealousy) from others... especially young adult consumers are ready for change in packaging'

(PHILIP MORRIS 1992A, IN WAKEFIELD ET AL. 2002).

Offering something different or unusual can also tap into youth sub-cultures:

'What I would add is that there is a definite sub-culture among younger ryo smokers, and I believe their desire to display their exclusivity could be supported by provision of unusually designed 'badges'...'

(CDP 1999, IN DEVLIN ET AL. 2003).

2.3.5 *Packaging for females*

Industry documents illustrate that gender specific packaging is another strategy used to boost the performance of brands. Much attention has been paid to understanding the female psyche and packaging is identified as the most overt way in which to target women (CARPENTER ET AL. 2005).

'throughout all our packaging qualitative research, we continue to validate that women are particularly involved with the aesthetics of packaging'

(PHILIP MORRIS 1992B, IN WAKEFIELD ET AL. 2002).

While innovation and the concept of 'new' is clearly outlined as appealing to young people, the documents also highlight this as an area of interest for females.

'recent qualitative research indicates that female smokers, particularly young adults, show great interest in new packaging designs'

(COHEN 1992, IN WAKEFIELD ET AL. 2002).

Packs specifically developed to target women are often designed to be long and slender, with pale or pastel colours. These details are acknowledged to portray femininity, style, sophistication and attractiveness. Philip Morris research for the female Virginia Slims brand shows feminine packaging to be highly evaluated by women, and associated with positive attributes such as not looking like a cigarette pack and being easy to carry in a purse (CARPENTER ET AL. 2005). Cleanliness, another desirable feminine attribute, is also portrayed through the pack in its paler colours, lines and structure.

'there seems to be some evidence that packaging preference is sex-linked... the cleanliness of the pack is its greatest attraction for the female smoker'

(OPINION RESEARCH CORPORATION 1961, IN WAKEFIELD ET AL. 2002).

2.4 Conclusion

Internal tobacco industry documents have highlighted the importance of packaging to the tobacco industry. The tobacco industry has identified that target consumer groups, especially young people and females, can be reached through packaging that communicates brand image, novelty, or value-for-money. Tobacco packaging utilises similar techniques and strategies to promote the product as those used in general consumer goods packaging. Packaging innovation, graphical design and value options all provide opportunities to assign meanings to brands.

Chapter 3: A review of tobacco packaging in the retail press from 2009 to 2011

3.1 General introduction

In chapter two, the review of research analysing past internal industry documents illustrates how the tobacco industry regards and uses packaging. We now present current tobacco packaging activity by examining the retail press. In line with the packaging strategies highlighted in tobacco industry documents, and employed for other consumer goods, we consider the three dimensions of innovation, image and value packaging to show how packaging is used by the tobacco companies selling to the UK market. A similar approach has been used elsewhere to provide a useful working framework for assessing packaging (MOODIE & HASTINGS 2011). We follow on from this study.



3.2 Method

An audit of the main tobacco retail press was undertaken from the 16th January 2009 to 30th June 2011. This follows on from the previous review, which ran from 1st January 2002 to the 15th January 2009 (MOODIE & HASTINGS 2011). Four popular UK trade publications (THE GROCER, OFF LICENCE NEWS [OLN], CONVENIENCE STORE, FORECOURT TRADER), which provide a broad overview of the sectors retailing tobacco (HASTINGS ET AL. 2008), were manually searched to monitor any changes in respect to tobacco packaging.

Within these publications packaging was often the specific feature of a brief article when a tobacco company altered the packaging of an existing brand or released a new brand or product offering. Packaging was also mentioned within longer tobacco product category overviews, promotional features and general brand advertisements. All packaging examples, including photographs, within these retail publications were recorded. To avoid duplication only the most relevant instance of the packaging feature is included within the analysis. It is worthwhile noting that some pack developments were not picked up by the four publications. For example, no mention of a Lambert and Butler limited edition side-flip pack was found (pictured), even though this pack was on sale at the start of 2010. It is possible therefore, as with the previous review, that more packaging changes occurred in the timeframe than were identified.

3.3 Tobacco packaging in the UK

3.3.1 Innovation

Innovative tobacco packaging is defined as pack modifications, including packaging materials or structure (method of opening or shape), and pack additions, such as tins (MOODIE & HASTINGS 2011). Moodie and Hastings' review outlined 15 instances of innovation packaging within the seven year period up to the start of 2009. Innovative cigarette packaging was not mentioned in the retail press until May 2006 with the launch of B&H Silver slide pack (MOODIE & HASTINGS 2011). This review found slightly more examples of innovation packaging, 18 in total, in less than half the time, suggesting an increase in this packaging strategy. This was predicted by Walker in 2009 as a response to health warnings:

'with the front and back of packs now almost entirely dominated by health warnings, manufacturers are starting to think quite literally outside of the box when it comes to new designs and re-launches. The launch of different shaped packs, boxes with curved edges, flip-tops or side draws are set to become more commonplace over the course of 2010'
(WALKER 2009a).

While innovation packaging occurred across all tobacco categories, most of this activity was for cigarettes and for premium brands. With down-trading a long term trend, a tobacco category analysis reported *'testing times'* for the premium cigarette category (WALKER 2010a). This resulted in substantial investment in redesigning the packaging of existing premium brands rather than new product launches. This includes a limited edition Camel pack which incorporated a change to the inner frame pack structure so the

camel logo on the lid remained intact when opened (FORECOURT TRADER 2009a), limited edition Silk Cut packs with bevelled edges (OLN 2009a), new Benson & Hedges 20 packs with bevelled edges (WALKER 2010a), and limited edition Silk Cut V-shape packs (WEST 2011). Innovation is mainly associated with premium brands as this helps to reinforce the premium brand image (WEST 2011).

The launch of Marlboro Bright Leaf in 2009 introduced a new concept in tobacco packaging. While it has an innovative lighter-style method of opening which produces a 'click' sound, an example of auditory packaging, it also has a tactile finish (CONVENIENCE STORE 2010A; OLN 2009b). This was followed by the release of a number of sensory style packs. In 2010 Japan Tobacco International (JTI) revealed its Silk Cut 'touch' pack, with Blackburn, JTI head of communications, explaining that *'the new textured design reinforces Silk Cut's premium status in the UK and ensures it will continue to provide retailers with a valuable source of profit'* (OLN 2010a). Three additional tactile packs were released in the first half of June 2011: Virginia S by Raffles (CONVENIENCE STORE 2011b), Marlboro Gold Touch (CONVENIENCE STORE 2011c) and Vogue Perle (FORECOURT TRADER 2011a). These last two packs come in smaller pack sizes with both Vogue Perle and Marlboro Gold featuring smaller cigarettes.

Innovation also appeared in regards to tobacco freshness. British American Tobacco (BAT) launched the Dunhill Reloc pack, which has a resealable foil casing designed to keep the tobacco fresh (WALKER 2009a), and the Benson & Hedges RYO pouch was launched with *'foil-fresh technology'* (CONVENIENCE STORE 2009a). Walker (2009a) stated that *'it is now more important than ever before for brands to invest in new packaging concepts which keep the tobacco product fresh for longer'* due to a reported trend in young adult females smoking a mixture of RYO and cigarettes. In respect to RYO tobacco, Pall Mall RYO was launched in a *'unique red vertical pouch'* (BAT 2011) which, when displayed in shops shows the health warning in a position that smokers and non-smokers are accustomed to, but when the pouch is held horizontally, which is necessary in order to prevent the loose tobacco from falling out of the pack, this results in the warning appearing at a 90 degree angle (pictured). Another RYO product, Rasta, was launched with the addition of a limited edition tin (THE GROCER 2010a). To illustrate the overlap between packaging strategies, Rasta is also an example of image based packaging which targets *'brand-aware young adult smokers'* and is designed to have an impact at POP with the bright Caribbean style coloured packaging. That it also included the description *'chill tobacco'* arguably taps into youth jargon (THE GROCER 2010a). Within the cigar category, there was the launch of Cafè Crème Express and Silver Filter, and Calisto miniature cigars in new tins (DAVENPORT 2009; THE GROCER 2010b; HEGARTY 2011).



Table 1: Examples of innovation based tobacco packaging from January 2009 to June 2011

DATE	TRADE PRESS SOURCE
June 2009	Benson & Hedges rolling tobacco will be available in Gold and Silver variants. Packs use new 'Foil Fresh' technology which incorporates a thin layer of foil in the pouch to keep tobacco as fresh and flavoursome as possible (CONVENIENCE STORE 2009a).
Aug 2009	Marlboro Bright Leaf will be available from September with a 'tactile pack design' (OLN 2009b). Packs have a lighter-style opening which opens at the side with a click (CONVENIENCE STORE 2010a).
Feb 2010	Marlboro Red is available in a metallic 'soft pack' of 20 cigarettes. The pack's metallic finish gives the appearance of a tin with a tactile logo and 'rivet' design (FORECOURT TRADER 2010a).
April 2011	With the launch of Calisto Miniature cigars, each tin will contain 10 cigars protected by a transparent inner liner (HEGARTY 2011).
May 2011	BAT has launched Vogue Perle, the 'first demi-slim cigarette' in the UK. The company says it is a modern format for UK's 4.7 million female smokers. The packaging was created in Paris to reflect the more accessible cigarette size, with rounded edges and a softer, more tactile texture (FORECOURT TRADER 2011a).
May 2011	Philip Morris is this month launching Virginia S by Raffles. While the surface texture of the pack is soft, the pack lining features a monogrammed Virginia S logo (CONVENIENCE STORE 2011b).
June 2011	This month sees the launch of limited-edition 'V-shape' packs of Silk Cut king-size 20s. Available for four weeks, the packs feature a 'unique structural design with an innovative opening and inner frame' (WEST 2011).

3.3.2 Image

Image-based tobacco packaging is defined as using on-pack design to create a favourable brand image (MOODIE & HASTINGS 2011). This can include colours, fonts, symbols and other graphical elements. Within the time frame any change to the existing pack design was monitored. This included permanent changes, and also temporary changes in the form of limited edition packs.

If a pack has already been counted as innovation packaging, to avoid duplication it is not repeated within this section, even though it may also use on-pack design elements to attract consumers. Yet even with the exclusion of such packs from this section, there appears to have been a dramatic increase in image-based packaging since Moodie and Hastings (2011) review, which found an increase in the use of image packaging in 2005 and 2006, following restrictions on advertising at the POP in December 2004, and the greatest number of examples, five in total, in 2008.

In stark contrast we found ten examples in 2009, 15 in 2010 and three so far in 2011. The majority of changes, 24 out of 28, were for cigarette packaging, but there were also instances of image-based packaging for cigars and RYO tobacco. Changing existing brands is a strategy used to develop and keep them up to date. Terms such as 'modernised' and 'contemporary' are frequently used in relation to new image-based pack designs. These redesigns, when permanent, often occur across the entire brand portfolio, either at the same time or as part of a more carefully planned roll out. For example, the packs for all variants of Mayfair, Berkeley and Sterling were redesigned at the same time (CONVENIENCE STORE 2009b; THE

GROCER 2009B; CONVENIENCE STORE 2010B), while the rebranding of the Marlboro portfolio took place over several months. In 2010 new packaging and names were introduced for Marlboro Menthol and Gold, with a new pack design for Marlboro Red (OLN 2010D; WALKER 2010a; CONVENIENCE STORE 2010c).

The release of new pack designs sometimes coincided with product development. For example, Philip Morris released a limited edition Marlboro Menthol pack to introduce the variant's enhanced menthol flavour (PHILIP MORRIS 2009). There was a total of 14 image-based limited edition packs introduced during the study period. Aside from being used to signal new product development these were often related to certain events. Amber Leaf and Richmond, for instance, celebrated brand anniversaries with limited edition packs in 2009. The Amber Leaf flip top pack featured a *'special over printer film design'* (CONVENIENCE STORE 2009c) while Richmond packs included an *'eye-catching red flash'* (CONVENIENCE STORE 2009d). Limited edition designs were also used to reflect seasonality, such as brightly coloured summer packs introduced for Pall Mall variants (OLN 2010e). In this instance the signature amber coloured pack was permanently changed to pink (WALKER 2011a). This change of colour to pink signals a female oriented design, as does the limited edition floral designed pack for Silk Cut Superslims, also released during the summer (JTI 2010a). For Christmas, generally regarded as the key cigar season, Hamlet brought out updated packaging which included the JR Freeman signature to reinforce the brand's heritage (THE GROCER 2010c). There was also a limited edition Royals pack to coincide with the FIFA World Cup in 2010. These packs were *'wrapped in flags' and had the logo 'loud and proud'* (OLN 2010f). These limited edition packs often have multiple designs in a set. For instance, there were four designs for the Mayfair Smooth variant in 2009, Sovereign's 'city lights' in 2010, and three each for Amber leaf and Silk Cut Menthol in 2010 (OLN 2009C; OLN 2010b; FORECOURT TRADER 2010b; OLN 2010g).

3.3.2.1 Making use of the entire package

Usually the redesign of packaging includes a combination of elements, including fonts, background designs, colours, embossments, symbols and inner foil. For example, pack changes for Berkeley included *'a simplified crest logo, modernised font for the Berkeley name and a new two-tone chequered design across all three variants'* (FORECOURT TRADER 2009b). Changes to the Mayfair pack included a *'faded stripe design in the background, a fine silver stripe down the left-hand margin, a smaller embossed crest in the top right corner of the pack and a modified logo'* (FORECOURT TRADER 2009b). Other pack changes included a lion emblem embossed in dark red to give *'greater shelf standout'* for Founders Blend cigars (OLN 2009D), a *'hand lettered font'* on Hamlet packs (THE GROCER 2010c), an *'embossed leaf and logo design'* for Amber Leaf (FORECOURT TRADER 2010b) and the inclusion of green inner foil for Silk Cut Menthol packs (OLN 2010g). For further examples and details of pack changes see Table 2.

These changes are often communicated via the pack cellophane and card inserts, extending the amount of space available for communicating with consumers and for promoting and advertising the new design. For example, there was a carefully planned roll out process for the new pack design of Mayfair in 2009 which included three stages. In July the new design was *'communicated with tear-tape advertising and pack inserts'*, in August packs had the new design *'overprinted with a film of the old packs to help customer recognition'* and the new packs with clear cellophane wrap were available in September (CONVENIENCE STORE 2009b). The Sterling and Marlboro Menthol pack redesigns in 2010 followed a similar three stage process (OLN 2010H; OLN 2010d). A *'transition pack'* for Lucky Strike Silver with blue bull's eye marked cellophane was available for six weeks (OLN 2009e) and cellophane on the Marlboro Red packs carried the message *'redesigned – same taste'* for two weeks before the new packs were available (OLN 2010i). Similarly the change to the Silk Cut pack outlined in the previous section, an example of innovation rather than design, was initially communicated with a card insert featuring the new 'touch' texture and cellophane with the message *'feel the new silk cut'* (OLN 2010a).

Table 2: Examples of image based tobacco packaging from January 2009 to June 2011

DATE	TRADE PRESS SOURCE
May 2010	Marlboro Gold was re-named Marlboro Gold Original, with the new pack designed intended to 'exude quality and style' (WALKER 2010A).
May 2010	BAT has introduced a new pack design for its premium Vogue Signature packs. Both Bleue and Menthe variants will feature the new design which combines a white background, embossed with a metallic purple logo, and a new inner foil. Both variants will have a 'pearl' in either blue or grass green on top of the pack (HARRISON 2010).
Oct 2010	Lucky Strike packs now feature an enhanced logo design, refined colouring with metallic sheen (CONVENIENCE STORE 2010d) and a 'passion inside since 1871' message to emphasise the history of the brand (OLN 2010j).
Oct 2010	Sterling has been given a modern new look with a packaging redesign across the entire range. Changes include an updated brand lozenge, an embossed crest and hallmark, finished off with a silver two-tone finish (CONVENIENCE STORE 2010b).
Nov 2010	JTI has revealed a 'more contemporary' packaging design across its Hamlet cigar brand ahead of the key Christmas season. Packets and tins feature a more modern-looking font and will be finished with a matt varnish. To reinforce the brand's heritage and authenticity, the JR freeman signature has also been introduced on the pack (THE GROCER 2010c).
Jan 2011	Lambert & Butler now features a 'new holographic pack design from the UK's No 1' (IMPERIAL TOBACCO 2011).
April 2011	Pall Mall packs feature a 'new metallic pack' (BAT 2011).

3.3.2.2 Pack design for all tobacco categories

Image-based pack redesign was as common for value and economy brands as it was for premium brands. The tobacco industry was described as '*preening its lower priced offering*' (WALKER 2010b) in response to the trend in down-trading. Within the timeframe a number of economy and value brands released new packaging designs, for example Richmond, Windsor Blue and Sterling for JTI, and Royals and Pall Mall for BAT.

While the design changes were primarily for cigarette packaging, two cigar brands released new image-based packaging: Founders Blend and Hamlet (OLN 2009d; THE GROCER 2010c). Only one brand of RYO tobacco, Amber Leaf, released this type of packaging. However, within the timeframe new pack designs were released for the brand on three separate occasions: a limited edition 10th anniversary pack in February 2009; three limited edition designs in September 2009; and then a more permanent redesign in April 2010 (OLN 2009f; OLN 2009g; FORECOURT TRADER 2010b).

3.3.3 Value

Moodie and Hastings (2011) describe value-based packaging as communicating value for money through pricemarking and variations in pack size. Since the previous review an additional concept for value-based packaging has been re-launched, specifically that of make-your-own (MYO) cigarettes, introduced for JPS in April 2011. A kit which includes a MYO cigarette maker, tubes and tobacco, enables smokers to make 20 cigarettes for much less than an equivalent purchase of pre-made cigarettes.

Value-based packaging, as highlighted in the retail publications, is a response to an economic climate where consumers are looking for greater value for money. Similar to the previous review, in this timeframe there are continuing reports of a changing market place, with consumers down-trading to lower priced brands or RYO (MOODIE & HASTINGS 2011). According to Imperial Tobacco price is now considered more important than taste in brand choice and lower priced brands in particular have focused on providing price-marked packs (PMPs) and other value strategies (WALKER 2010a). See Table 3 for examples of value-based tobacco packaging.

'manufacturers have moved into overdrive with an array of new cheaper brands and variants, smaller pack sizes and repositioned ranges... you'd be hard pushed to find another grocery category that has seen subject to such a radical shift in demand, appearance and ranging in such a short time'

(WALKER 2010b).

3.3.3.1 Variations in pack sizes

The previous review outlined five new pack sizes. In this much shorter timeframe there were six mentions of new pack sizes for tobacco products, suggesting that this is still an important strategy for communicating value for money. Down-trading and economic pressures are cited as reasons behind these moves. For example, BAT launched Pall Mall 19 packs, described as *'wallet-friendly'* (WALKER 2009a) and offering a *'more affordable price-point'* at a time when the low-priced category was growing by 50% (CONVENIENCE STORE 2009e). Similarly, smaller pack sizes, 14s, became available for Silk Cut and Mayfair for *'price-conscious'* consumers (THE GROCER 2010D). These 14 packs are intended to stop smokers opting for lower priced brands, giving *'an alternative to down-trading'* (WALKER 2011a) as well as boosting the 14s range for JTI (THE GROCER 2010d).

Value for money was communicated for RYO tobacco with a new 50g pack size for Cutters Choice (OLN 2010c) and new 12.5g and 25g pack sizes for Players Gold Leaf (OLN 2010k). The Players packs, which had been increased from 11.5g and 23g respectively, retained their original prices. These moves coincide with reports of growing consumer demand for larger RYO pack sizes (WALKER 2010b). Festive multipacks were also made available for Hamlet cigars (OLN 2009H). Multipacks are typically priced at a lower cost than buying the packs individually, and are therefore another strategy aimed at communicating value.

3.3.3.2 Price-marked packs

The biggest trend however in communicating value for money is pricemarking. In total, 21 brands used on-pack pricing either on all or some of its variants. While it is not possible to draw comparisons with the number of PMPs on offer between the two reviews, the publications searched within this timeframe have reported that they have increased. Towards the end of 2009 Walker noted *'it is likely that the recent proliferation of eye-catching limited-edition pricemarked packs on the market will also continue'* (WALKER 2009a) and then in 2011:

'the end of 2010 saw no let up in the number of pricemarked packs (PMPs) being launched onto the market. Virtually all of British American Tobacco UK's (BAT UK) lower-priced brands are available in PMPs, and last November Imperial made its flagship standard-priced brand Lambert & Butler King Size available in PMPs'

(WALKER 2011a).

The importance of PMPs is further highlighted by Henri Lewis, BAT UK and Ireland brand manager, who said *'PMPs will become more important in 2011 as shoppers continue to ensure that they get the best value for money'* (WALKER 2011a). Certainly PMPs do appear important to the tobacco industry. Within advertisements and promotional features, considerable space is devoted to communicating the advantages to retailers of stocking PMPs. Advertises

featuring phrases such as ‘demand for pricemarked packs is on increase, stock up now’ and ‘high impact PMP’s for maximum sale - stock up now’ are commonplace (E.G. BAT 2009b; BAT 2009c). For the VAT price increase in January 2010, JTI offered price reductions on PMPs so retailers wouldn’t lose out (WALKER 2010c). However, while the industry and consumers appear to favour PMPs (WALKER 2011a) there is evidence that some retailers have mixed feelings about their value and whether reduced margins are offset by the boost to footfall and secondary sales (WALKER 2011b).

Alongside setting the price for the retailer, pricemarking is also used to indicate promotional prices and signal a change in pricing strategy. For example, Winston packs used pricemarking to flag up the lower price of £4.79, down from £5.33, to support its UK roll out (THE GROCER 2010e). PMPs were also used to communicate a repositioning of Berkeley to the mid-priced tobacco category in June 2010 (CONVENIENCE STORE 2010e) and a new price of Pall Mall in November 2010 (BAT 2010).

Table 3: Examples of value-based tobacco packaging from January 2009 to June 2011

DATE	TRADE PRESS SOURCE
Feb 2009	Imperial Tobacco is launching a new RYO tobacco at the lower end of the market. Golden Virginia yellow has a lower price point than the original Golden Virginia Green pack. Imperial hopes the brand in pricemarked packs will appeal to young smokers (CONVENIENCE STORE 2009f).
July 2009	Imperial Tobacco has dropped the price of its Windsor Blue range in a move to attract economy-conscious shoppers. A special promotion will be run in July on pricemarked packs (OLN 2009i).
Feb 2010	Cutters Choice, the value RYO brand from BAT has been launched in a 50g pricemarked pack. The launch meets the growing demand for larger pack sizes and value for money (OLN 2010c).
Oct 2010	Imperial Tobacco is introducing PMPs of Lambert & Butler and Golden Virginia Green for the first time. The move means the biggest brands in the cigarette and RYO category will be available price-marked at rsp to help independent retailers compete against the multiples (THE GROCER 2010f).
Mar 2011	Imperial Tobacco is launching a novel cigarette-making kit that cuts the price of a pack of 20 JPS Silver cigarettes by over 20%. The smoker must pay a one-off cost of £3.09 for the Make Your Own cigarette maker. The tubes (99p for a pack of 100) and tobacco (£3.60 for 14g) are sold separately. On an ongoing basis the smoker would be able to create 20 king-size cigarettes for just £3.80, while the pre-Budget price of a pack of regular JPS Silver cigarettes was £5.08 (PHILLIPS 2011).

3.3.4 *New product developments: (RYO and female oriented products)*

Renowned for capitalising on the opportunities a changing market place brings (MOODIE AND HASTINGS 2011), two areas appear to have received specific industry focus: RYO tobacco and female oriented products.

3.3.4.1 *RYO*

RYO tobacco has benefitted from down-trading which has resulted in ‘the seemingly unstoppable growth of Roll Your Own brands, which soared by a further 18% in the 12 months to December 2010’ (WALKER 2011a). This reported area of growth has been described by the Scandinavian Tobacco Group as the ‘silent hero of the tobacco category at the moment’ (WEST 2011), with one in four smokers choosing RYO (CONVENIENCE STORE 2011d). Accompanying this

increasing movement towards RYO were reports of a change in the image of RYO tobacco and its consumer base. Traditionally associated with older men, there are increasing reports of both younger and female smokers down-trading from cigarettes (WALKER 2009a; WALKER 2010b), with the RYO category also developing a 'cool' image. For example, BATs brand manager Henri Lewis said the RYO category had benefitted from 'recession chic' (OLN 2011a).

Within this review, there has been a flurry of activity within the RYO category with the launch of eight new products. In 2009, Golden Virginia Yellow was created to target smokers 'who want to trade down rather than give up' (THE GROCER 2009c). B&H RYO was introduced to fill a gap in the premium RYO market (THE GROCER 2009d) and Crossroad offered a 'chemical-free' brand designed to 'appeal to smokers who wanted a tobacco with more natural ingredients' (THE GROCER 2009e). In 2010 Rasta was launched by Zig-Zag and two low price brands introduced rolling tobacco: No3 by Landmark Wholesale and Red Brand by Booker (GROCER 2010a; CONVENIENCE STORE 2010f; CONVENIENCE STORE 2010g). Two new offerings introduced in 2011 were Pall Mall RYO and JPS Silver RYO (OLN 2011b; PHILIPS 2011).

3.3.4.2 Female targeted products

In 2009 industry analyst Walker highlighted that the number of female smokers had grown by 1.2% as 'more women look to the tobacco category for help with stress and weight management' while the number of male smokers had decreased (WALKER 2009B). Menthol cigarettes have been described as 'particularly appealing to female young adult smokers' (CONVENIENCE STORE 2008). Developments within the timeframe included an enhanced menthol flavour for Marlboro Menthol (OLN 2010d), and new menthol extensions for Pall Mall (Convenience Store 2009g), Sterling (CONVENIENCE STORE 2010h) and Windsor Blue (OLN 2010L). Menthol variants were also launched in 2011 for Chesterfield and Vogue Perle (CONVENIENCE STORE 2011e; OLN 2011c).

There have also been further developments in the size of cigarettes, continuing from the successful introduction of Silk Cut Superslims purple and menthol in 2008 (MOODIE & HASTINGS 2011). Two new products developed for women were Vogue Perle and Marlboro Gold Touch. Vogue Perle, described as the 'first 'demi-slim' cigarette on the market' (OLN 2011c), positioned between slims and superslims, is described as a 'modern format for the UK's 4.7 million female smokers' (FORECOURT TRADER 2011A). Similarly, Marlboro Gold Touch is 'slimmer to the touch than original – 7.1mm in diameter' (CONVENIENCE STORE 2011e) and comes in a 'compact box designed to fit easily into a pocket or handbag' (FORECOURT TRADER 2011b). Although not picked up by the retail press, within the review timeframe Allure superslims were introduced to Asda Supermarkets and since this review ended Richmond Superslims have also been introduced (GILBERT 2011), (see image of these products below). In terms of product appearance the 2010 limited edition Silk Cut Superslims had a floral design on the product, something not usually seen in the UK (JTI 2010a) and Virginia S by Raffles is another recent brand launch said to be targeted at females (HOOK 2011).



3.3.5 *The impact of packaging*

While it is not possible to know the impact of all the pack changes that occur, reports within the publications do point to the value in updating a brand's packaging. Positive reports can be found for all three packaging types. For image-based packaging, Cutters Choice RYO was said to have gained an 8.77% market share in 2008:

'The reasons behind this growth are varied. Firstly, RYO in general has become far more widely accepted by consumers. Secondly, Cutters Choice is reaping the rewards of last year's upgraded pack design'

(FORECOURT TRADER 2009c).

Windsor Blue sales were also said to have increased 62% *'thanks to a pack redesign and price repositioning'* (OLN 2011d). A PMP promotion for Sterling in 2008 resulted in a sales increase of 8%, changing its market share from 5% to 6.1% in four months (COLLENETTE 2009; THE GROCER 2009a). One year after the introduction of 19 packs, Pall Mall's market share had increased by 2.54% (CONVENIENCE STORE 2010i) and *'early indications are proving promising'* said JTI in response to the introduction of 14 packs (WALKER 2011a). In terms of innovation, JTI has also said the B&H Silver slide pack consistently *'outperforms the flip-top box when products are priced at parity'* (CONVENIENCE STORE 2011f). With brand name and price held constant, and in an environment that prohibits the use of any other marketing tools, this difference represents a real world demonstration of the impact that the way a pack opens can have.

Packaging also plays a major role in new brands reaching consumers. Given packaging is the only way in which to communicate new brands, and that brands can be launched successfully in a dark market, indicates its strength. Often it is the packaging design of new product development which makes an impact. The success of Silk Cut Superslims is testament to this. First launched in the UK in 2008 with an innovative new packaging shape, the superslims segment resulted in a year on year growth of 122% between 2008 and 2009 according to JTI (JTI 2010b). To maximise a brand's success, the industry also knows where the brand is best placed to reach its target. For example, an article in Forecourt Trader advised retailers that *'Silk Cut Superslims should be stocked by retailers in urban areas with a high proportion of nightlife'* (FORECOURT TRADER 2009c).

3.4 **Conclusion**

This audit of current UK tobacco packaging developments suggests that the level of tobacco packaging activity is increasing. Brands appear to be in a continuous cycle of modernisation through pack redesign. Increasingly, innovative packaging and limited editions draw attention to the product, while value packaging offers smokers greater choice through 14 packs and larger RYO packs, and PMPs tap into current consumer concerns about price at a time of economic instability.

Chapter 4: Packaging research with young people

4.1 General introduction

Chapter two suggests the tobacco industry strategically uses packaging to communicate with young people. While this finding originates from industry documents of previous decades, chapter three highlights that innovation, image and value packaging are strategies commonly used today. In this chapter we explore if, and how, young people respond to branded and plain tobacco packaging, providing qualitative research from the UK. Firstly, packaging generally was explored to understand: a) how young people engage with consumer goods packaging; b) packaging's role within brand choice; and c) whether brand imagery is communicated by packaging. Within a tobacco context the research then explored: a) young people's pack awareness and preferences; b) their perceptions of innovation, image and value packaging; c) the packs' role within youth smoking; and d) perceptions of plain packaging that differs in shape, size and method of opening.

4.2 Method

4.2.1 Design

Consistent with previous qualitative plain packaging research, focus groups were employed to gain in-depth exploratory insights into how young people respond to packaging. In this instance participants were able to handle packs to get a true feeling of the shape, methods of openings and textures of tobacco packaging currently available. Based on chapters one to three a semi-structured discussion guide was developed and then reviewed as the focus groups progressed.

Participants were asked to do a range of activities such as grouping and ordering items according to statements written on show cards. Projective imagery techniques were used to assess what packaging communicates (SCHLACKMAN AND CHITTENDEN 1986). Personification, where the participant imagines the pack as a person; and free association, where participants raise whatever thoughts come to mind when viewing the pack, lead the participant to link concepts with packaging. These techniques indicate the brand imagery projected by the pack.

The lead moderator guided the discussion while a second moderator recorded observations. These included participants' non-verbal responses to packaging, such as body language and facial expressions, and verbal exclamations. With participants' consent, photographs were taken to record the results of activities and the discussions were digitally audio-recorded.

Due to the potential sensitivities involved in exposing young people to tobacco packaging, each session ended with a discussion to ensure the focus groups in no way encouraged participants to perceive cigarettes and smoking more favourably and participants were provided with smoking related information specifically developed for a youth audience. The focus groups took place during the Easter school holidays in April 2011 in Glasgow. Each group lasted one and a half hours.

4.2.2 Sample and recruitment

Using quota sampling, participants were recruited through professional market research recruiters. To eliminate socially desirable responses and disguise the health related aspect of the research, participants were informed that the study purpose was to explore the marketing of products to young people. The true purpose of the study was explained to participants at the end of the groups.

In total eight focus groups, divided equally by gender and social grade (ABCI/C2DE), were conducted with young people aged 15 years (N=48). It was not possible to split the groups evenly by smoking status, as was intended, due to difficulty in recruiting smokers at this age group.

On the recruitment questionnaire, nine participants admitted to being regular smokers (smoke one or more cigarettes a week), with 39 non-smokers. All smokers were from the C2DE economic grouping, five girls and four boys, comprising the majority of two groups. Five non-smokers also said they had smoked in the past. However, resulting discussions led the moderators to suspect the true number of smokers to be higher, with around one-third of the sample, if not regularly smoking, experimenting or smoking occasionally. Certainly within the sample there was a good range of smoking experience. Informed participant and parental consent was obtained prior to study onset. Participants received £15 for taking part. Ethical approval was granted by the ethics committee at Stirling University.

4.2.3 *Materials*

4.2.3.1 *Consumer products packaging*

To encourage thinking about packaging generally rather than restrict the focus to tobacco packaging from the outset, participants were shown several items each of toiletries, cosmetics, confectionary, crisps and soft and alcoholic drinks, categories chosen for being the types of products the age group were likely to have had experience with. The products varied in terms of price, brand (i.e. economy, mid-priced and premium), gender and age orientation as well as packaging style including materials, structures, dispensing method and graphical design elements.

4.2.3.2 *Branded cigarette packs*

The branded tobacco packaging used in the groups had recently been or was currently on sale in the UK, and included examples of innovation, image and value packaging, to represent the range of tobacco packaging on offer. Innovation packaging included packs with different shapes, methods of openings; texture; image-based packs included limited edition packs and value-based packs included packs with a price flash or different size offerings. The packs varied in terms of colour, price, likely target group and included cigarettes and RYO tobacco.

4.2.3.3 *Plain pack*

A plain pack was made up for the purpose of the study. This was a standard 20 king size shaped box with a dark brown colour (previously identified in focus groups with young adults as the most unappealing), and a made-up brand name 'Kerrods', found to have few associations in the minds of young adult smokers (MOODIE ET AL. 2011). The plain pack featured a text health warning on the front, a pictorial warning and UK duty paid label on the back, and ingredients and emissions information on the side - in line with current UK regulations for tobacco packaging.

4.2.3.4 *Plain packs which differ in shape, size and method of opening*

Eight packs which differed in shape, size and method of opening, all on sale in the UK at the time of the research, were spray painted dark brown for the purposes of the study. Brand names were covered up to explore the impact, if any, of the different structures. As with the plain pack, all tobacco packaging markings required in the UK were displayed. The packs included a standard flip top king size box, a taller superkings box, a slide pack, two styles of superslims boxes, one slims box with bevelled edges, a 14 sized pack, and a 19 sized pack with bevelled edges.

4.2.4 *Procedure*

The focus groups started with a warm-up discussion on spare time activities and shopping habits. Each group was then asked to familiarise themselves with the consumer products (see section 4.2.3.1) before grouping the items in whatever way they thought appropriate using a grid placed on the floor. If the items were grouped by product category, participants were asked to do this again but to consider appearance rather than product type. This was

followed by ordering products from 'appealing' to 'unappealing' and 'for someone like me' to 'not for someone like me'. Groupings, orderings and the reasoning behind participants' decisions were discussed. In this way, participants spoke of product packaging likes and dislikes, identified good and bad features, product expectations, what they thought the packaging was trying to say, and projected imagery.

The remainder of the session focused on tobacco packaging. Firstly, participants were asked to describe packs they had seen, where they had seen them and who had them. This was followed by showing participants a range of tobacco packs (see section 4.2.3.2) including the plain pack, which they were asked to spend time examining and opening. Following the same procedure as above, participants first grouped the packs however they thought appropriate, then ordered the packs 'appealing'/'unappealing' and 'for someone like me'/'not for someone like me'. Based on participants' discussions and emerging themes, the discussion focused on individual packs. Prior awareness of packs was explored, and participants discussed their thoughts and associations.

Participants then did further ordering activities using show cards and a smaller set of tobacco packs, selected to explore different packaging types: innovation, image and value. Due to time constraints four of the focus groups were allocated Group A show cards and four, Group B. Group A items were: attractive/unattractive, stylish/not stylish, poor quality/good quality, a pack I would like to be seen with/a pack I would not like to be seen with, and most harmful/least harmful. The Group B items were: eye-catching/not eye-catching, cool/uncool, my friends would like this pack/my friends would not like this pack, appealing to someone thinking of starting smoking/not appealing to someone thinking of starting smoking, and strongest/weakest. Orderings were discussed and participants were asked to draw contrasts between different packs.

Participants were then shown eight plain packs which differed in shape, size and method of opening (see section 4.2.3.4). These were grouped together in whatever way participants thought appropriate and ordered in terms of attractiveness, strength and harm.

The groups ended with a discussion on packaging to explore the role of packaging generally in brand choice, followed by a more specific discussion around the importance of packaging for tobacco products. Lastly, participants' views on the introduction of plain tobacco packaging and what they thought it would mean for young smokers and non-smokers were sought.

4.2.5 *Analysis*

The focus groups were fully transcribed and the transcriptions were checked for accuracy. Data from the transcriptions, focus group observations and photographs were examined and a thematic analysis was undertaken to identify key and emergent themes. Transcriptions were coded using NVivo9 and the analysis followed an inductive approach to interpret the data. All members of the research team independently read the transcripts and themes were agreed through discussion.

4.3 *Results*

4.3.1 *Consumer goods packaging*

Across consumer goods, participants had clear preferences for different packaging styles, were tuned into the implications of different designs and easily drew messages from design features such as colours, fonts, materials and structures. Participants were particularly drawn to more colourful items and items with innovative features such as the Lynx deodorant twistable opening and L'Oreal spray tan nozzle. At the early stages of discussions, without any mention of tobacco or plain packaging, plainer designs were grouped together as

unappealing and boring. Packaging communicated price, target market, product quality and convenience. It was easy for participants to form user images from packaging, often providing detailed descriptions of the level of income, style, appearance, age, interests, and personal attributes of the product user.

4.3.1.1 *Packaging at point of purchase and post-purchase*

Participants were clear about the importance of packaging in their brand choice of consumer goods. Some participants said it was as important as the product and that it played a part in their purchasing decisions. Others acknowledged that while it was important, brand and reputation were also significant. Participants also described that essentially, people weren't drawn to plain and boring looking items. The particular appeal of colour to young people was also highlighted.

I think the package is a big part of the product....Probably just as important as the product
(GIRLS, C2DE)

It's very important, if it doesn't look appealing no one is going to buy it
(GIRL, ABCI)

All groups could give examples of situations where they had been drawn to products because of the packaging. For girls, the packaging of cosmetics and perfume appeared especially important and boys repeatedly spoke of being influenced by the design of energy drinks. Both genders described being attracted to the colourful wrappers of confectionary and crisps. It was also highlighted that convenience, and whether the product packaging was likely to be displayed in public, was taken into account in purchasing decisions.

Makeup, like mascara, the other day I was going to buy one just because it had a nice pattern on it
(GIRL, ABCI)

I liked Relentless (energy drink) cos the writing. The dark background and the writing stood out because of that... I only got it cos I looked at it and I thought it looks pretty good
(BOY, ABCI)

...something you would use in public. You don't want to have to bring out something ugly. If it's too big as well, so you can't carry it around with you
(GIRLS, ABCI)

Additionally, some of the girls described uses for packaging post-purchase. They often spoke of keeping and reusing attractive packaging for a different purpose. There was a sense of enjoyment in these items.

I've got a Paris Hilton (perfume) box. I think you can actually keep it, it's dead nice. It's got jewels on it
(GIRL, C2DE)

4.3.2 *Tobacco packaging awareness*

Generally, there was little awareness of different styles of tobacco packaging apart from the key brand, which for the participants in this study, was Mayfair. Most participants could describe Mayfair's blue pack design and this was viewed as a standard tobacco pack. It was seen as a popular, every-day pack, commonly smoked by family members and peers. It was also a pack to be seen with for 'fitting-in' purposes. Participants did not view this pack as particularly attractive or as a good design, but it was sometimes described as cool and good quality because of its popularity.

They're just normal – nothing special... Everybody could smoke it
(GIRLS, C2DE)

Aside from Mayfair, there was little prior awareness of the packs used in the focus groups. A small number of participants had seen the innovative B&H slide and Marlboro Bright Leaf packs before. On occasion, some participants could recall seeing the Lambert & Butler, Pall Mall and Silk Cut packs and the Golden Virginia pouch. However, it appeared that participants were seeing most of the packs used in the focus groups for the first time. This was despite a general perception that tobacco packs were everywhere and seen countless times a day in shops, vending machines, public smoking areas and on the ground.

4.3.3 *The pack's role in youth smoking*

To some extent the pack appeared peripheral compared with the cigarette in youth smoking, particularly at the initiation/experimentation stage. The general perception was that young people would either 'jump in', i.e. pool their money among a group of friends to buy a pack, or buy single cigarettes from someone in school known to have a pack. Asking older people to purchase tobacco on a young person's behalf was common, but some participants also knew of shops which would sell to those underage. Some said they never really saw the pack being used it was just the cigarette that was passed around. Others said they saw both the cigarette and the pack. Only the boy group with four smokers said that most people had their own pack, while another group said this was dependent on how much money people had at the time. Many participants described a smoking area in or around their school grounds where smokers could go.

Somebody will have the packet and they all pay each other for them

(GIRL, C2DE)

They just pass round a cigarette out at a time....People would go the shop at lunchtime... jump in for their cigarettes

(BOYS, ABC1)

They always go like to a different place where they can't be seen, there's like a bit when you walk down it's where all the smokers go and they've got them all lined up... They've like stuck packets up on the fence so there is like a big row of them

(GIRL, C2DE)

4.3.4 *Innovation packaging*

Packs with different methods of opening and unusual shapes sparked much interest and curiosity, resulting in some of the strongest responses and preferences among participants. Having something very different or unusual was seen as a positive. Several packs had bevelled edges and one had rounded edges, however these features were largely ignored by participants. Two packs also featured 'tactile' pack designs, and although this feature was never referred to by participants, several boys held the Marlboro Bright Leaf pack for prolonged periods. While they appeared to be focused on the method of opening, it is possible that the packs' tactility had a part to play. It has been suggested that sensory packaging has an effect on a more subconscious level.

4.3.4.1 *Method of opening*

Two packs with innovative openings (Marlboro Bright Leaf and B&H slide) produced some of the strongest reactions across the groups. When shown the openings, all but one group were openly impressed and interested in the gadgetry, although this group still rated these packs positively. Initial reactions included several exclamations of 'wow' and there were obvious displays of enjoyment in opening these packs. Some participants thought other people would be impressed: '*people might be stunned by it*' (BOY, C2DE) with young people a particular target '*they are more attractive to young people*' (BOY, ABC1).



In the initial 'appeal' rating exercise, all boy groups rated both packs appealing, while only one girl group rated the Marlboro Bright Leaf as appealing. One explanation for this is that despite participants repeatedly describing the openings as 'cool', this was not viewed in isolation when making decisions, suggesting that gadgetry alone, while having an initial impact, is not enough.

I think the opening thing is cool but like I don't know. The whole packet isn't. It looks a bit tacky
(GIRLS, ABC1)

Furthermore, some participants questioned the functionality of the slide pack, describing the design as 'awkward' (GIRL, C2DE) 'annoying' and 'inconvenient' (BOYS, ABC1). Some also said the slide opening was 'pointless' (GIRL, C2DE; BOY, ABC1) due to the extra packaging needed to make this feature. It was seen as a novelty which would soon wear off.

I couldn't be bothered with it all the time, cos when it was further down the packet, you'd be pure trying to get it out. You'd end up pulling it apart. It would frustrate you
(BOYS, C2DE)

*You might try it cos it looks cool the way it opens.
Then the fun would wear off*
(BOYS, C2DE)

In contrast, participants indicated no concerns over the Bright Leaf opening, likened to a lighter and a 'gun' (GIRL, ABC1). The boys in particular were very positive about this pack, calling it 'snazzy' (BOY, ABC1) and 'sophisticated' (BOYS, C2DE). This opening was always viewed positively, as being better than a standard pack, with a 'unique' selling point (GIRL, C2DE).

Unique point if that makes sense, it's like the Lynx you always know it's that one... It's good because it's different
(GIRLS, C2DE)

Additionally, those who perceived the Bright Leaf pack favourably described the design as 'professional' and 'designer', like 'art' (BOYS, ABC1). This was reflected in participants' price perceptions of the pack which was considered 'classy' and 'expensive' (BOYS, C2DE). The slide design produced similar perceptions, suggesting that young people view effort in packaging design to be a reflection of a quality product.

It looks dearer and if it is dearer you probably get a better fag... They are not going to put a rubbish fag in a packet like that
(GIRLS, C2DE)



4.3.4.2 Pack shape

Participants had very positive responses to slimmer, more feminine oriented packs. Initially, there was both curiosity and uncertainty as to exactly what or how many cigarettes these packs contained. Some participants thought they contained filter tips, while others thought they must hold only four or five cigarettes. The Silk Cut Superslims pack was repeatedly referred to as looking like perfume or makeup, and the Vogue pack, like chocolate. That these packs did not resemble a standard cigarette pack generated interest among participants, particularly the girls.

They don't look like cigarette packets. It's unusual and you'd want to buy it to see what it's like inside
(GIRLS, ABC1)

Because they look like other things, you want to look at them to see what they actually are
(GIRL, C2DE)

The packs were repeatedly described as unusual and different to standard packs, something viewed positively by participants. One explanation for this may be that participants' smoking attitudes were generally negative (see section 4.3.8.1) and these more unusual packs shed some of the negative associations of smoking.

Of particular appeal was the difference in shape, but many participants were also drawn to the colours of these packs. In terms of gender, the packs were consistently rated as 'appealing' by all but one group. However, while this group of boys didn't identify with the pack, they still considered these packs to be attractive and stylish. Similarly, a further two boy groups didn't think these packs were for them or said they wouldn't like to be seen with them, but in all other aspects the packs were rated positively by the boys despite being of a more feminine design.

They're not really cool to have, but they look quite nice
(BOY, C2DE)

They are quite nicely packaged I guess. They look different. They don't look normal
(BOY, ABC1)

Generally liked by all, these packs were commonly described as 'cool' but also 'cute' (GIRL, ABC1) 'compact' (BOY, ABC1) and 'skinny' (GIRL, C2DE). They were perceived to contain less tobacco, resulting in lower harm perceptions. Overall, the user imagery of the superslims packs was positive, relating to a slim, attractive and classy female. Of particular benefit to participants, the packs' slimness gave added convenience, being easy to carry around in a pocket or bag.

That these packs were smaller and didn't immediately resemble cigarettes also gave an element of discretion. That these packs could aid hiding smoking from others was seen as an advantage.

They'd be easy to hide
(GIRL, C2DE)

It's dead thin and easy to carry about and doesn't stand out in your pocket
(BOY, C2DE)

...if you were smoking and you were trying to like hide it from your mum and dad and that like fell out your pocket or something it wouldn't be cigarettes
(GIRL, C2DE)

4.3.5 Value packaging

Four examples of value packaging were used as stimuli. The pink Pall Mall pack and the Golden Virginia box both featured bright yellow price-marking strips. Two packs offered 14 cigarettes: Mayfair King Size and Benson & Hedges Silver. Overall the value aspects of these packs (price-marking and number of cigarettes) had little impact on participants' perceptions. As strong impressions resulted from other pack features, the Pall Mall pack and Golden Virginia box are discussed in the image-based packaging section (4.3.6). The 14 packs are discussed below.

4.3.5.1 Size

The two 14 packs sparked much curiosity and discussion among participants. There was little prior awareness of this pack size. Only one participant thought they were becoming popular: 'a lot of people have the 14s now' (BOY, ABC1). Participants questioned why the packs had a large 14 on the front, and this sparked some interesting responses including weight and product strength. The number 14 repeatedly signalled messages of age.

People like younger than us probably would probably think if they looked at that, it would be for us because like they are fourteen

(GIRL, C2DE)

I don't know if they are deliberately trying to sell to fourteen year olds, but I think it sort of appeals, because they'll look at it... They are sort of saying it without actually saying it, like subliminally saying you know, fourteen year olds

(BOY, ABC1)



That the packs contained 14 cigarettes was neither viewed positively or negatively suggesting that different size offerings have little meaning for young people. Those that liked the 14 packs attributed this to both the concept being different to a standard pack and the prominence of the 14. The convenience of the smaller shape was seen as a positive in several groups.

It looks different... hearing people saying I'll go and buy ten fags or twenty, but if you go and buy fourteen, it sounds different as well

(BOY, C2DE)

Yes it's like quite a good size... They would fit in your pocket quite well

(BOYS, ABC1)

The design of the Benson & Hedges 14 had a greater impact on participants than the Mayfair 14 and was noted as more eye-catching and prominent, with a 3D appearance. Several groups described how this pack's red 14 conjured up strong imagery and associations to something fun, for example: Lego; sports; and game shows.

They look like a wee children's toy, not that it's a toy but it reminds me of it, like a wee boy would like Lego

(GIRLS, ABC1)

The fourteen looks pretty cool. Aye the wee dots

(BOYS, C2DE)

4.3.6 Image-based packaging

The focus groups highlighted that all packaging can create a brand image from its design, whether positive or negative. The groups also showed young people to be adept at identifying how on-pack features such as colour, font, brand name and background design; impact on brand and product perceptions. Sometimes there was one overriding feature which impacted on pack and brand impressions, and while an attempt has been made to illustrate the impact of these design elements, perceptions of tobacco packaging generally came from the combination of pack elements, including health warnings. The strongest positive imagery tended to come from the most eye-catching, brightly coloured packs, with prominent and bold designs.

4.3.6.1 Colour

Overall, darker coloured packs were described as boring and for older smokers, and associated with greater strength, harm and ill health. Exceptions were the black Sovereign limited edition and Marlboro Bright Leaf packs which were sometimes seen as cool, although this was due

to other design features such as the on-pack city scene or method of opening, discussed elsewhere.

It looks as if it would do more damage... Just that it is dark...It represents like danger... Like the people that would buy them can take stronger things

(GIRLS, ABC1)

In contrast, lighter coloured, feminine packets were rated 'appealing to those thinking of starting smoking' and 'weakest'.

*They look cool, not friendlier, but they don't look as harmful
You wouldn't want to get into the strong stuff at the start*

(GIRLS, ABC1)

See the packets with the white they look a lot less harmful... Cos it's white, it just looks cleaner

(BOYS, ABC1)

Although not always liked, the distinctive pink Pall Mall and gold holographic Lambert & Butler packs drew particularly strong responses.

Lambert & Butler

The gold holographic pack was repeatedly associated with parties and discos. Those that liked the pack said it was 'fun' (BOY, C2DE) and 'funky' (GIRL, ABC1) while for others, the shiny appearance made the pack appear 'cheap' and 'tacky', for somebody 'trying too hard' (GIRLS, C2DE). A contradiction between the shiny pack design and font was noted by one group.

*Some of them look pretty shiny
They don't look boring...
The way the lines are on it and the way the light hits it looks like fun...
Cos it's like disco lights; Looks really cool*

(BOYS, C2DE)

*The writing kind of reminds me of like an old man...
So if they are like old but then they've got the new bit on it if that makes sense like the shiny bit on it.
Like an old man trying to let go of his young-ness*

(GIRLS, C2DE)

In terms of the user imagery, this was often described as a pack for both genders, and associated with a young 'bubbly' (GIRL, ABC1) 'happy' (BOY, C2DE) and 'outgoing' (BOY, C2DE) person. It was also associated with somebody 'unique' (GIRL, C2DE) and 'individual' (BOY, ABC1).

Pall Mall

The bright pink Pall Mall pack was viewed as looking cheap by those that disliked it. The girls who liked it described the pack as 'bright' and 'happy' (GIRLS, ABC1) and it was associated with 'girly things' such as 'Barbie' (GIRLS, C2DE). One girl also thought the brand name font added to the pack's appeal. The consistent user image was a very young female.

The pink just looks really like it would attract teenage girls

(GIRL, ABC1)

*I don't see any older person smoking them...
Sixteen. It's like a dead girly girl – someone like that who would buy that, cos it's dead pink*

(GIRLS, C2DE)



4.3.6.2 Font and brand name

Fonts frequently impacted on pack perceptions and brand imagery. For example, the Chesterfield pack design was likened to a 'tattoo' (GIRL, ABCI) and 'graffiti' (BOY, C2DE). Several groups thought the pack was 'cool' and it reminded them of 'rock and roll' (GIRL, ABCI). While the background pattern had a role to play, font style was also important in creating these impressions.

It looks like a designer, it's like motorbike stuff...

The same kind of writing and like style

(GIRLS, C2DE)

Another girl group also associated the Chesterfield pack with somebody 'posh' (GIRL, ABCI) because of how the name sounded. The Vogue brand name also appeared to have a big impact on imagery. Here the brand name, font and pack shape all worked in synchronicity, creating a consistent brand image. For the females 'Vogue' was associated with 'classy' and 'glamorous' (GIRLS, ABCI) stemming from its repeated fashion associations. This had a positive impact on product perceptions. A number of boy groups were also drawn to the style of font.

The writing, colour and the way it blends in together is pretty well done

(BOY, C2DE)

The name Vogue, like a fashion magazine and I don't know it's just to do with glamorous stuff

(GIRL, ABCI)

Like you think of cigarettes as like disgusting but you think those ones are going to be fancy

(GIRL, C2DE)

4.3.6.3 Limited edition packaging

Featuring much more decorative pack designs, limited edition packs often resulted in very different perceptions, level of appeal, associations and imagery, to the equivalent standard packs.

Sovereign

While not always a pack that appealed, four groups rated the limited edition Sovereign pack more positively than the standard pack in terms of style, attractiveness, quality and coolness. In contrast the standard pack was always rated negatively. The limited edition's design was the sole reason for its more favourable response, consistently associated with the city, night time, and fast cars.

That is more kind of fast paced; It looks like New York a bit; It looks classy

(GIRLS, ABCI)

In line with these associations, the user image was of a young 'outgoing' (BOY, C2DE) 'party' (BOY, ABCI) person, as opposed to the standard pack image of an older, more boring individual.

Golden Virginia

Similar to the two Sovereign packs the Golden Virginia RYO packs were not always well received by participants but both boy C2DE groups viewed the limited edition box much more favourably than the standard pouch. The box was different in structure to the usual RYO pouch, but the key source of its appeal appeared to be the brighter colour and background leaf design, frequently associated with marijuana.

The box is cooler, better colour and I like the design on it

(BOY, C2DE)

4.3.7 Plain pack perceptions

Placing the 'Kerrods' plain pack alongside branded packs for the tobacco packaging activities gave insights into plain pack perceptions and the messages a plain pack communicates relative to branded packs. The groups gave no indication they suspected the plain pack was anything but a genuine pack, although this may be explained by the low brand and pack awareness of all but the most popular brands. Participants were accepting of the plain pack, worked with it in the same way they did the branded packs and assumed the pack was available for purchase.

When participants were asked to group packs together however they wished, the plain pack was usually placed with branded packs viewed negatively. The sets of packs containing the plain pack were categorised as being '*the ones that older people smoke*' (GIRL, C2DE) with boring and '*dull colours*' (GIRL, C2DE). They were also described as '*common*' (GIRL, ABC1) and the packs which '*put you off (smoking)*' (BOY, C2DE). In these instances the plain pack was commonly placed with darker coloured packs. In contrast, pack sets not containing the plain pack were positively defined as being for '*our age*' (GIRL, C2DE) '*nicely packaged*' (BOY, ABC1) having '*good designs*' (BOY, C2DE) and '*cool openings*' (GIRL, C2DE) and looking '*girly*' (GIRL, ABC1).

When rating packs according to items on show cards, the plain pack was rated overwhelmingly negatively. Across the groups it was consistently viewed as 'unappealing', 'not for someone like me', 'unattractive', 'a pack I would not like to be seen with', 'not eye-catching', 'uncool', 'not stylish', 'unappealing for someone thinking of starting smoking', and 'my friends would not like this pack'. Exceptions to negative ratings were rare. While the plain pack was always rated as looking 'strongest', there were mixed reactions to the level of harm of the plain pack, however participant's reasons for this were difficult to interpret and the plain pack produced powerful harm connotations for participants in further discussions (see section 4.3.8.2).

4.3.7.1 Plain pack image

In addition to the above, participants described the plain pack as old fashioned, cheap, stupid and a strange colour. Several groups commented on the lack of effort put into its design.

Looks dead cheap
No one would buy it
(GIRLS, ABC1)

These negative perceptions transferred to the user of the plain pack, resulting in a very distinct image, which was unappealing and negative in the eyes of participants. They described the image of an old man in ill-health, with old-fashioned clothes and few interests, and a heavy smoker.

4.3.7.2 Plain packs differing in shape and size

Grouping and rating the eight plain packs with different structures proved the most difficult task as participants struggled to group and distinguish between the packs. The initial response was that they all looked the same and participants couldn't see beyond the brown colour.

They are all the same looking
You wouldn't know what was cheap and what was...
(BOYS, ABC1)

On further consideration, all groups noted the packs were different shapes and while they could group them in this way – slimmer packs were usually grouped separately from more standard shaped packs – this was perceived a meaningless activity as shape in the context of



the plain packs drew few associations. The only exception came from two groups who drew gender associations.

You couldn't really tell anything about them apart from you can tell the womanly ones because they are pure thin

(BOY, ABC1)

Attractiveness

In terms of attractiveness, these packs were mostly rated unattractive due to their plainness and 'disgusting' (GIRL, C2DE) colour. However, the narrower and slimmer shaped superslims packs were sometimes rated less negatively due to their more unusual shape.

If any of them are attractive it's that one just because it's kind of perfume shaped

(GIRL, ABC1)

When asked to describe the user imagery of these packs, accounts were very negative, in line with the standard plain pack user outlined above. Those that were asked to choose their preferred plain pack from the selection, most commonly chose the slimmer packs (the plain Silk Cut Superslims or Vogue packs), and this choice occurred across genders. They boys said they were the packs easiest to carry around, while the girls said they were the least noticeable.

Strength and harm

When rating packs in terms of strength and harm, some groups couldn't distinguish between packs due to lack of information, some said they all looked strong and most harmful, while others singled out the slimmer packs as looking weaker and less harmful. As these packs are smaller, participants perceived them to contain less tobacco, indicative of reduced strength and harm.

There is no information on the packets except for the warnings...

You can't distinguish one from the other, except from shape

(BOYS, ABC1)

Smaller ones are the weakest only because there is less in it

(GIRL, ABC1)

In one instance, the brown pack which was the same shape as the Pall Mall 19 pack was placed alongside the slimmer packs as looking weaker. Here the pack shape was viewed as feminine: it is slightly smaller than a standard 20 pack with bevelled edges. Neither the edges nor size of this pack were mentioned when the branded version of this pack was used in previous activities. One possible explanation may be that these elements were only noticeable when the pack's overriding feature – its bright pink colour – was eliminated. This would imply that a plain pack enhances structural features otherwise diminished by the presence of branding.

More feminine...

Yea, because they are a wee bit smaller...

It's curvy

(BOYS, ABC1)

4.3.8 *Emotional pack responses*

One key finding was that messages within packaging triggered emotional responses in participants. To understand this important role of packaging and the extent of packaging's influence on young people, it is pertinent to first outline participants' smoking attitudes.

4.3.8.1 *Smoking attitudes*

Attitudes towards smoking and smokers were very much negative across genders and socio-economic grouping. Smoking was seen as something to be ashamed of and associated with 'neds', a derogatory Scottish term applied to people from poorer backgrounds. It is difficult to know whether this is a reflection of young people's smoking attitudes generally, or simply the attitudes of a largely non-smoking sample, but similarly negative attitudes were presented in the two groups with a majority of regular smokers.

Well you look at people who smoke and you think they smell and are dirty and horrible
(GIRL, C2DE)

Further discussion around smoking suggested these prevailing negative attitudes would transfer to the pack. However, when exposed to tobacco packaging, especially holding packs to get a true sense of dimensions and colours, participants found some packs particularly appealing. So despite negative attitudes, packs and pack users were not always perceived negatively by association.

*...you just look at them (smokers) and think, I don't know, maybe they are a bad person or something
Like they've had a hard life
Ok, if you saw someone with this purple pack (Silk Cut Superslims) would you think they'd had a hard life?
No, you'd think they were just like trying to look cool or something*
(GIRLS, ABC1)

The quote above illustrates how a pack can soften a negative attitude towards the smoker of the pack. Furthermore, when participants were asked to hold their favourite pack, to imagine and describe how they would feel if that was their pack, rather than describing negative responses, which would be in line with their smoking attitudes, participants within all groups described how packs had aroused positive feelings, overriding negative thoughts about smoking.

4.3.8.2 *Emotional responses to packaging*

There were some gender differences both in the favourite pack chosen by participants and their responses to these packs. Within the girl groups, the female oriented Silk Cut and Vogue superslims packs were most frequently chosen. These packs evoked feelings of cleanliness, niceness and femininity, and were repeatedly associated with things that gave them pleasure, such as perfume, make-up and chocolate. Among the boys, the Marlboro Bright Leaf, Lambert & Butler and B&H slide packs were commonly chosen and associated with feelings of maturity, popularity and confidence.

(I'd feel) like more classy and not so dirty (Silk Cut Sueprslims)
(GIRL, C2DE)

It (Marlboro) looks as if you're like more mature. Better and more popular
(BOY, C2DE)

It (Lambert & Butler) would make me feel more confident
(BOY, C2DE)

It (Silk Cut Superslims) makes me feel quite cool. I just like the design on it. It makes you feel like stylish and that, kind of upper class
(BOY, C2DE)

For both genders, these packs were seen as something to be proud of, and would likely show them off to people. In particular, they were thought to make people feel better about smoking and less embarrassed in contrast to the plain pack.

*You'd feel better about it (smoking) than carrying that brown thing (plain pack)...
To see that (plain pack) you'd think, 'what am I doing, carrying this about?'...
Aye, in front of all your pals if you brought it out you wouldn't feel embarrassed, but if you brought that (plain pack) out you'd be pure embarrassed. People who don't smoke would look at you like they were ashamed of you*
(BOYS, C2DE)

Conversely, plain pack responses were in line with smoking attitudes and produced feelings of embarrassment, shame, cheapness and being unclean, eliminating any of the benefit which had been associated with the more appealing packs. Consistently, participants described negative feelings in relation to the plain pack: 'disgusting', like 'a junkie', 'boring and smelly' (GIRLS, C2DE) 'old' (GIRLS, ABC1). Additionally, the plain pack reinforced the ill health aspects of smoking, whereas some of the branded packs, particularly the feminine, slimmer packs, softened the health effects of smoking.

It (plain pack) would make you feel depressed smoking
(BOY, C2DE)

I think that one (plain pack) looks like you'd be more ill if you kept smoking them but they ones (Silk Cut Superslims) look like you wouldn't be so unwell if you smoked them for ages
(GIRL, C2DE)

*They (Silk Cut Superslims limited edition) look too colourful to be harmful...
Just cos of the wee designs... looks more friendly, more approachable*
(GIRLS, C2DE)

4.3.9 Perceived impact of packaging and plain packaging

4.3.9.1 Importance of packaging for tobacco products

There were mixed reactions to the perceived importance of tobacco packaging. While some outlined that packaging was unlikely to play a role in the decision to smoke, others thought packaging was important for the initial brand choice. Packaging was generally agreed to be unimportant for established smokers. Price was highlighted as being more important than packaging for young people by the two girl ABC1 groups.

But it is still important because some people starting off smoking would not pick a packet that looks horrible
(GIRL, ABC1)

Beginners, cos they won't know the differences between certain different kinds of cigarettes, so they might just buy it for the look of it, and think that must be good because it looks good
(BOY, ABC1)

I don't think non-smokers would be, like think I'm going to smoke, just cos that packet is nice
(GIRL, ABC1)

4.3.9.2 Perceived impact of plain packaging

There was a mixed reaction to the perceived potential impact of plain packaging. Generally, participants expected a greater impact on young people contemplating smoking than established smokers, although there were exceptions to this as detailed below.

Young starters

Across the groups the plain pack was thought to make smoking less appealing to young starters. The negative image surrounding this pack was a key factor. It was perceived as taking away any 'coolness' associated with smoking. The pack's lack of discretion was also thought important.

You won't be attracted by them anymore because it's the packaging that does it

(GIRL, ABC1)

It looks like just old people smoke it, like what your maw and dad always smoked, so why would you start?

(BOY, C2DE)

You don't want to be seen carrying about a brown box with you everywhere

(GIRL, C2DE)

However, several participants perceived plain packaging would have little impact on young people who chose to start smoking primarily as a way of fitting in with their friends.

Established smokers

As previously mentioned, the majority of participants thought plain packaging would have little impact on established smokers. In the event of plain packaging a brand's reputation and smoker loyalty was expected to supersede negative perceptions that may occur due to packaging changes.

Nothing because they already smoke and they already know what they like, it's not like they would try anything new so they still would buy it

(GIRL, C2DE)

...it might stop someone maybe who was starting but (not) people who've already started because like the name is still going to be on it so they are going to know that they like that brand, so the box isn't really going to make a difference

(GIRL, ABC1)

However, some participants, particularly in the group of boys with a regular smoker majority, thought the plain pack colour would be enough to make smokers either want to stop or put them off smoking. Additionally one girl group also perceived a potential impact on social smokers.

It might make you come to your senses and stop

(BOYS, C2DE)

Because they (social smokers) are not addicted... the ones that smoke all the time wouldn't care so much about the packaging

(GIRLS, ABC1)

4.4 *Discussion and concluding remarks*

Across consumer products, young people are particularly tuned into packaging design, value the effort put into design and can give sophisticated accounts of how packaging features impact on product perceptions and user imagery. Not all tobacco packaging and brands are viewed positively by young people – something to be expected by a heterogeneous group with differing personalities and tastes – however, participants did identify with certain tobacco packs.

The packs most highly appraised featured innovative, unusual or distinctive designs and included the Silk Cut Superslims, Marlboro Bright Leaf, Lambert & Butler Gold holographic and pink Pall Mall packs. All of these packs had either been recently updated or were new to the UK market. This suggests the tobacco industry benefits from investing in new designs. Furthermore, different groups of young people can be reached through limited edition designs which change existing pack and brand perceptions.

Innovation and image appear most important for young people, consistent with findings from industry documents that suggest young people place more importance on these things than value; price-marking and the smaller 14 pack size were largely ignored by participants. However, while it is useful to categorise packaging in terms of the three different types – innovation, image and value – young people view the pack holistically and tobacco packaging can perform multiple roles and communicate numerous things simultaneously. For example the smaller B&H 14 pack offered value-for-money and convenience, but its prominent red 14 design created strong impressions, signalling messages of age and fun imagery.

The lighter and brighter coloured packs and those with distinctive designs generated the strongest positive user imagery and were associated with young, attractive and happy people. This is testament to the powerful influence of branded packaging. These thoughts cancelled out negative attitudes held towards smoking and smokers. Despite the appeal of some of the packs, whether they would be packs that young starters would choose was debated. The focus groups highlighted the importance of fitting-in, price and product strength in youth smoking consideration. That these things too are communicated to young people through packaging, suggests that packaging may have a role to play in initial brand choice.

Ultimately, benefits are presented to young people through tobacco packaging design: functional benefits, including convenience and discretion; emotional benefits, particularly more positive feelings about themselves and smoking; and information on harm and strength, arise from the shapes and design features of branded packaging. Comparatively, plain packaging reduces the benefits associated with branded packaging. In particular, a standard-shaped plain dark brown pack diminishes the positive associations that branded packaging has and exposes tobacco as being harmful and dirty, something for older heavy smokers.

Plain packs with different shapes still communicated harm, strength, convenience and discretion. Smaller structures were perceived to be more convenient and discrete, and weaker and less harmful due to the perceived reduced amount of tobacco contained within. This suggests having standard shaped plain packaging would be most effective at reducing packaging's ability to communicate with smokers and potential smokers. That fonts used on packaging can strengthen or weaken pack perceptions also highlights the importance of including a standardised font on plain packaging. Finally, the groups highlighted how brand name alone can create imagery, for example the glamorous image of 'Vogue'. In the event of plain packaging, a brand's name would become the crucial remaining pack element. Tobacco brands would have to rely on their reputation and loyalty, rather than brightly coloured, interesting packs, to influence young people.

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