

Colquhoun Associates
Market Research Consultants

**QUALITATIVE RESEARCH INTO NEW PACK DESIGNS
FOR OLD HOLBORN**

THE SUMMARY REPORT

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I BACKGROUND

Gallaher is the UK's second largest handrolling tobacco manufacturer, with a 38.0% market share in the UK. Gallaher's principal handrolling tobacco is Old Holborn which is a "dark", "strong" tobacco.

Approximately ten years ago the packaging of Old Holborn was updated by replacing the principally brown packaging with blue and orange (blue now being universally acknowledged as representing "dark" tobacco) which proved popular. Design aspects of the pack were also changed and in particular the "Old Holborn" name was made more impactful.

There has now been identified a need for the brand to update its image through new pack design. The new pack design should be attractive to other brand users without alienating current Loyalists and enhance the overall positioning of the brand.

In December 1997 **Colquhoun Associates** was invited to conduct research. This document comprises a summary of their findings, conclusions and recommendations.

II RESEARCH OBJECTIVES

The overall objective of the research was;

TO IDENTIFY THE CHARACTERISTICS AND ELEMENTS OF PACK DESIGN
WHICH MAY PERSUADE LIGHT TOBACCO SMOKERS TO SMOKE
OLD HOLBORN WITHOUT ALIENATING CURRENT LOYALISTS

Specifically research sought to;

- investigate current perceptions of the Old Holborn brand including brand name, character and expectations
- investigate physical attributes of the pack
- explore the “graduation” concept and positioning of Old Holborn brand
- explore perceptions to new pack designs
- explore attitudes to “strap lines” attributed to the brand

III METHOD AND SAMPLE

FOUR, ONE AND HALF HOUR GROUP DISCUSSIONS
WITH OLD HOLBORN AND GOLDEN VIRGINIA SMOKERS

The Sample Specification was as follows;

GROUP	RECRUITMENT SPECIFICATION	AGE	SEX	REGION
Group 1	Old Holborn smokers	35-54	male	W.Midlands
Group 2	Old Holborn smokers	25-34	male	S.W.London
Group 3	Golden Virginia smokers	35-54	male	W.Midlands
Group 4	Golden Virginia smokers	24-34	male	S.W.London

All respondents to have been;

- buying and smoking at least 12.5g of their preferred brand of rolling tobacco a week.
- smoking RYO tobacco for at least two years
- smoking their preferred brand for at least 1 year

Respondents were paid an incentive of £15 to attend group discussions.

Fieldwork was conducted by Gordon Colquhoun on the 10th and 11th of December 1997.

Copies of the recruitment questionnaire, discussion guide, rotation of exposure to new pack designs across the groups and “strap line” concepts used in group discussions are shown in the Appendices section of this report.

IV CONCLUSIONS AND RECOMMENDATIONS

THE CURRENT PACK

1. "Old Holborn" Brand Name

The "Old Holborn" brand name was universally perceived as the most valuable vehicle for promoting the brand. The "Old Holborn" name on the current pack was large and bold, and reflected for loyalists and other brand users of a confident, established, strong, dark tobacco.

A sizeable minority connected the "Old" with "*old fashioned*" and "*outdated*", claiming the tobacco was smoked predominantly by older males. However, the majority perceived the "Old" to reflect an established brand which had been around for a considerable time. These respondents identified the heritage, longevity and pedigree of the brand as asset which should continue to be promoted through the bold, impactful and traditional design.

2. Pack (texture)

Although the majority of respondents (other brand users as well as loyalists) had used or come into contact with an Old Holborn pack, they did not immediately recall any difference in texture between an Old Holborn pack and a Golden Virginia pack. When probed, the Old Holborn pack was considered by the majority to feel more capacious and robust than the Golden Virginia pack and this suggested to many that the tobacco would stay fresher.

Overall perceptions of the Old Holborn pack were seen to be coherent with the brand and most rejected the suggestion of a softer pack for the tobacco.

3. Seal

Many complained that the adhesive seal on the pack began to lose its adhesive quality quite quickly. This would normally happen before the user reached the end of the pack and therefore the tobacco began to lose its freshness.

An improved seal could enhance loyalist satisfaction with the pack and add to the attraction of the brand to potential switchers.

4. Positioning - The "Graduation" Brand Concept

The majority of other brand users understood the theory behind the "graduation" concept, but did not perceive it to be a behaviour they personally would adopt. Many had initially experimented with various brands of rolling tobacco before choosing their current brand (Golden Virginia), but had not considered graduating from that point on to a stronger brand. If anything, they believed that current social, family and health pressures meant that it was more likely that people would switch "downwards" to a more mellow tobacco, rather than upwards to a richer and stronger tobacco.

Many perceived that the attraction of the "graduation" concept might appeal to younger rolling tobacco smokers entering the market. A few suggested the introduction of "Old Holborn Light" which would familiarise smokers with the taste without the strength. They could then "graduate" on to traditional Old Holborn in time if they needed a stronger tobacco.

5. Old Holborn New Pack Designs

The new pack designs were welcomed by the majority as a positive step in upgrading current brand imagery. The preferred routes, "Facelift" and "Evolution" reflected respondent desires to update the pack whilst retaining the strong primary brand colours (blue/orange) and a degree of linkage to the current pack design.

Loyalists were most attracted to the "Evolution" route pack designs which were most similar to the current pack. However, they could still appreciate the linkage to the current pack in the "Facelift" route. For loyalists, the "Facelift" route was perceived to be modern and aimed at a wider market.

Many of the other brand users preferred the "Facelift" route. They appreciated "Evolution", but wanted a greater departure from the traditional pack design.

With both the "Evolution" and the "Facelift" routes other brand users perceived the brand to be more appealing in image terms. Many suggested that they would be less inclined to perceive the brand negatively as being "*old fashioned*" and "*outdated*" if the image of the pack were to be updated along these lines.

Preferred Routes

“Facelift”

This route was described by the majority as being “modern” without losing the brand’s traditional image. It particularly attracted the younger other brand users who described it as “energetic” and “young”.

The following were chosen as the favourite designs;

- FL 12A
- FL 12B
- FL 13

There were many positives identified in these three new pack designs;

The primary blue and orange pack colours had linkage to the current pack, but were perceived to be brighter and more impactful. FL12B and 13 had a textured surface which was perceived to increase the impression of pack quality.

The blue and gold margins also increased the feeling of quality in the pack design.

The “Old Holborn” name was bold and large, framed in the traditional arch as the majority believed it should be. The “arch” frame itself was scrolled, which added to the presentation and impact of the brand name.

Leaves placed centrally with background lighting were perceived to introduce a “natural” feel to the pack design.

Richard Lloyd & Sons printed on these selected packs was considered coherent in size and style with the rest of the pack layout. The italics reinforced a classical feel to the pack and the name itself was fairly recessive and not too impactful.

The elephant design on FL13 was appreciated by the majority and added dynamism to the brand imagery. Many linked the design to a bold statement on the strength of the tobacco.

With all three executions, the framing of the strap line was bold and more impactful than the current pack or the "Evolution" route.

For a few respondents the green background of the strap line added interest to the overall colour of the pack. However, the majority believed the green had too strong a connection with mellow tobacco and introduced a contradiction in terms of the strength of the tobacco.

A few loyalists responded negatively towards the "Facelift" route because of the limited linkage to the current pack. These more traditional users required a less radical departure from the current pack design.

Of the three chosen designs the most popular was FL13.

"Evolution"

The majority were positive to these new pack designs. Loyalists appreciated them the most, as they constituted a gradual and conservative change from the current pack design.

The following were selected as favourites were selected;

- EV 1
- EV 2
- EV 9 _

Positives identified in these new pack designs were;

The traditional blue and orange primary pack colours were believed by the majority to be an indispensable part of the brand image.

The "Old Holborn" name remained large, bold and impactful, framed in the traditional arch.

The majority of loyalists perceived the window (square) was an attractive and familiar feature of the current pack. This route included this design feature, but also improved the internal background colour from a lighter blue to a darker blue.

The design for the new elephant design was preferred by the majority over the traditional elephant design. However, a few loyalists did endorse the more traditional elephant as representing a more attractive "heraldic" element to the overall design.

The blue and gold margins increased the feel of quality in the pack design.

The framing for the strap line, although not as impactful as the “Facelift” route, was described as being more “energetic” than the current pack design.

Richard Lloyd & Sons was considered coherent with window design and colours (discreet, not too dominant or impactful).

The larger leaves were appreciated and a few suggested they added an increased “natural” element to the new pack design.

6. Strap Lines

The strap lines chosen by the majority of respondents for the Old Holborn brand reflected a confident, established and traditional brand which was known for its distinctive strong flavour.

Strap lines spontaneously rejected by many respondents were associated with mellow, smooth and golden. These strap lines were not coherent with the brand image, strength and taste.

The most popular strap line for loyalists and other brand users was “The Handroller’s Choice”. Loyalists perceived the brand as the market leader and this was successfully, but subtly supported by this strap line.

“Rolling In Flavour” was the second most popular choice of strap line. This described the distinctiveness of the brand in the context of flavour and taste.

V MAIN FINDINGS

1. General Perceptions of Old Holborn

1.1 Loyalists

Loyalists claimed that Old Holborn was the market leader in rolling tobacco. They perceived Old Holborn to be the “*number one brand*”, with the only serious competition (in terms of popularity) being Golden Virginia. The leading status of Old Holborn for loyalists was reflected in the availability, longevity and general popularity of the brand.

“Popular like B&H, the No1 rolling tobacco”

Loyalists believed the brand appealed to young and old, although mostly to males because of the strength of the tobacco and the brand image associated with Old Holborn (bold, simple, dark, “navy”).

Old Holborn was seen by loyalists as the traditional and established “dark” tobacco.

“It’s been around for years”

“It’s tried and tested”

Many loyalists had tried other brands over the years and found the appeal of Old Holborn was based on strength and taste. To them, Old Holborn was a strong and satisfying smoke with a distinctive taste and smell.

Strength was the main criteria for many younger loyalists when they initially selected the brand. They required a strong tobacco which satisfied their needs and found Old Holborn could fulfil this requirement.

Some of the older brand loyalists had started with Old Holborn because it had been perceived in the past as being the only, strong established tobacco which lacked, at the time, any serious competition.

1.2 Other Brand Users

Other brand users recognised Old Holborn as one of the market leaders. They viewed its popularity as being equal to Golden Virginia. Most had tried and rejected Old Holborn at some time in the past. The main negative associated with Old Holborn for other brand users was the strength of the tobacco which was perceived as being too harsh in comparison with mellow Golden Virginia.

The distinctive taste of Old Holborn was also rejected in favour of Golden Virginia because of the similarity in smoking Golden Virginia to that of cigarettes (milder).

The perceived appeal of the brand to younger smokers was less evident to other brand users and the majority associated the brand with older male smokers.

"I don't think Old Holborn can appeal to the younger generation. It's because of its strength, not its image"

Unlike Golden Virginia, Old Holborn was perceived to be a male brand with all the attached brand imagery.

"Old Holborn looks bolder, more regimental than Golden Virginia"

2. Perceptions of the Current Pack

2.1 "Old Holborn" Brand Name

There was universal acknowledgement of the importance the brand name played in contributing/defining brand images. The impact of the name on the pack defined a bold, distinctive, and established brand which radiated confidence and tradition. This in turn reinforced the impression of a premier quality tobacco which had set and attained high quality standards throughout the years.

"Old Holborn is a name that's been around for ever"

*"As long as you had the name Old Holborn on the pack,
you could put the tobacco in a white pouch and people would still buy it"*

The antithesis of this was the more subtle brand imagery of Golden Virginia name which was perceived as appropriate for a mellow, lighter tobacco.

The majority believed that the "Old" in Old Holborn reflected an established brand and not one which was necessarily *"old fashioned"* or *"out of date"*. However, a sizeable minority perceived the "Old" to be in keeping with their perception of an *"older persons smoke"*. This perception was particularly evident in the younger Golden Virginia groups who believed the image of the current pack reflected their attitudes to the brand (dark, old fashioned, bland, boring).

In Detail

The font used to print the brand name was perceived to be bold and impactful with a stylised, traditional quality which added character to the name. Because of the perceived importance of the brand name the majority believed the lettering should remain large and the focus of the pack design. The gold shadow surrounding the lettering was not immediately recalled by the majority. Some respondents suggested it diluted the impact of the “Old Holborn” lettering.

The framing and shape of the brand name was also considered to be an important factor which supported the brand image. The arch was described as traditional and added a classical feel to the brand. Both these features were considered to be positive by the majority of respondents.

2.2 Image and Style - Current Pack Packaging

2.2.1 Colours

The orange and blue primary colours on the pack were perceived to be distinctive Old Holborn brand colours and easily recognisable. The colours were considered coherent with perceptions of a dark tobacco (Drum, Samson). However, the blue on the current pack was described by some loyalists and other brand users as bland and boring.

Within the window (square) of the current pack the lighter blue was described by many as “*too bright*”, and garish in colour.

2.2.2 Design

Elephant Design

The traditional elephant design was recessive and not noticed by the majority. Even some loyalists who had smoked the brand for a number of years had overlooked this design element. Some believed the elephant added a “heraldic” feel to the pack design and reflected positively the established and traditional nature of the brand .

Many suggested that a larger, bolder elephant would be more impactful and reflected the strength of the tobacco in the design.

“Like the ESSO tiger, it should be prominent”

The majority concluded that the elephant represented “some type of trademark” , although there was continued confusion as to its relevance.

A few other brand users initially identified the design as a camel and commented negatively on the message.

“I thought it was a camel. Old and tired.”

The overall reaction to the “Elephant” design was mixed, with the majority seeing more potential to emphasise the message of tobacco strength.

Leaves

The leaves within the window (square) were commented on positively. They added a “*natural*” element to the pack design and complemented the symmetrical overall design of the pack. The gold on the leaves was seen to reflect successfully the quality of the tobacco and some suggested they could be further emphasised.

Strap Line

The simplicity and directness of the strap line was identified by the majority. However, the message was considered a fairly neutral statement and not supporting the brand as much as it could. A few perceived the visual impact of the lettering diluted by the light blue background and this was thought to limit the impact of the message.

Borders

The white edges of the pack were perceived spontaneously by many to be “*tacky*” and “*cheap*” in appearance. Many perceived white colouring within a pack design to reflect a more down market, cheaper image.

Lines

The horizontal lines (rules) on the pack failed to have immediate impact, due to the dark blue background. When prompted, many commented on the perceived “*old fashioned*” image of the rules.

Style

The style of the pack was described by the majority as “*traditional*”, “*conservative*”, “*British*” and “*uncomplicated*”. Loyalists see appeal in this imagery although some believe the current pack imagery could be modernised. These loyalists would have liked to have seen the pack project a brighter image without significant departure from the fundamental design elements such as the brand name, arch, window and leaves of the current pack.

The majority saw the pack style as appealing more to males rather than females, but believed this imagery should not be diluted as it would effect the brand character (strong, bold).

2.3 Pedigree

The majority of respondents (with the exception of some loyalists) were unaware of the name of their brand manufacturer. The spontaneous perception of the manufacturer was described by some as a “*cottage industry*” type of business, although due to the size of the brand (Golden Virginia or Old Holborn respectively) many believed it was more likely to be indirectly manufactured by a larger company.

Many suggested Richard Lloyd & Sons reflected successfully the idea of a “*specialised*” manufacturer as opposed to a larger, impersonal corporation. The majority preferred the idea of a smaller, specialised manufacturer making their tobacco.

The design and impact of the manufacturer's name on the pack was perceived to be fairly discrete, not dominating pack designs and this was commented on positively. The "*Richard Lloyd & Sons*" name printed in italics was coherent with the character of the brand, both in size and style.

"It should be fancy, but you really don't want to know it's there"

2.4 Pack

The majority of respondents could not recall immediately any difference in the "feel" of the Old Holborn pack compared to the Golden Virginia pack.

When asked to compare the packs physically, the Old Holborn pack was considered to be tougher and more robust than the Golden Virginia pack, which indicated to many that the Old Holborn pack kept the tobacco fresher for a longer period.

"Old Holborn has a more protected feel to it.

Golden Virginia feels cheaper"

The Golden Virginia pack, though softer in feel, was perceived by some to be coherent the more mellow nature and taste of the brand.

2.5 Seal

The issue of the adhesive seal on the rear of the pack was spontaneously raised as an on going problem in pack design. The limited adhesive ability of the seal was perceived by many to be a recurrent problem in keeping the tobacco fresh.

3. “Graduation” Brand Concept

3.1 Smoking History

The majority of loyalists and other brand users recalled having tried several rolling tobacco brands before settling with their preferred brand. A few of the older loyalists had started with Old Holborn and remained with brand. They recalled that the variety of brands available was limited when they started smoking and Old Holborn was the accepted stronger tobacco of their day - the “*natural*” choice. Having been accustomed to the taste for a considerable time they were reluctant to experiment.

For loyalists of all ages the attraction to Old Holborn was primarily the distinctive taste and strength. Old Holborn was considered to be a strong tobacco which delivered the necessary satisfaction, unlike the mellow competitor brands (e.g. Golden Virginia).

Many of the Golden Virginia smokers had experimented with various rolling tobacco brands including Old Holborn. They had selected their preferred brand (Golden Virginia) for the mellow taste and the similarity of the tobacco to cigarettes (in terms of taste). They rejected Old Holborn on the grounds of strength, taste (some described Old Holborn as having a “sweet” taste) and smell.

3.2 Current Trends

3.2.1 Loyalists

Loyalists enjoyed the distinctive taste and aroma of Old Holborn. Due to the same social and family pressures encountered by other brand users, many also smoked cigarettes (majority B&H) at home and especially when socialising.

3.2.2 Other Brand Users

Due to family and social pressures many felt embarrassed or guilty in smoking darker, heavier tobacco at home (lingering smoke and smell). For the Golden Virginia smokers, the mildness of the tobacco enabled them to be less obvious in their enjoyment both at home and in a social environment.

For some, health considerations played a part in their selection of a milder tobacco and this was seen to be reflected generally in society by similar trends in cigarette smoking (low tar, light tobacco variants).

There was also a perceived to be an increase in the number of female rolling tobacco smokers who were generally thought to smoke the more mellow tobaccos.

3.3 The "Graduation" Concept

The concept of "Graduation" to a stronger, richer brand was rejected by the majority. From their own experience, many believed that once they had made their initial choice of tobacco they were unlikely to switch brands, unless it was for an equally mellow tobacco.

*"The only reason you change tobacco is if you get
bored of it. Then it's to something similar"*

*"If I wanted a stronger smoke than Golden Virginia, then
I would smoke a cigar"*

From their own experiences, the majority of respondents perceived the current trend was to switch down to mellow /light brand.

A few suggested the possibility that this concept might be more feasible if a lighter version of Old Holborn were introduced. Potential "graduate" smokers would then get used to the lighter version and possibly be more inclined to graduate up to the richer, stronger Old Holborn brand if they required a stronger tobacco.

*" Why not Old Holborn Light? Then they progress
up into Old Holborn"*

4. Strap Lines

4.1 Old Holborn Associations

The majority used the following words to describe Old Holborn tobacco and the qualities associated with the brand;

Old Holborn Tobacco	Old Holborn Brand
Strength	Established, Experienced
Darker tobacco	Traditional, Conservative
Distinctive taste	Market Leader
Heavy smell	Male
Quality rich tobacco	Regimental

These word associations reflected the basis upon which respondents matched the brand to their selection of strap lines.

4.2 Strap Line Examples

Respondents were asked to choose a selection of strap lines (including their favourite) which would/could be represented on pack. The strap lines chosen reflected their perceptions of the Old Holborn tobacco and brand.

Respondents had twelve examples to choose from. Unknown to respondents, within these twelve examples there were three categories used to describe the strap line;

Product	Product + Activity	"In Control"
Greater Smoking Satisfaction	The Mellow Rolling Experience	Go Your Own Way
Mellow Smoking Satisfaction	Rolling in Flavour	The Handroller's Choice
Satisfyingly Smooth	For The Mellow Moments	When You Know What To Roll
Smoothly Satisfying	Golden Rolling Moments	
Naturally Mellow		

■ The majority spontaneously rejected the following strap lines;

- "Mellow Smoking Satisfaction"
- "Naturally Mellow"
- "The Mellow Rolling Experience"
- "For The Mellow Moment"

“Mellow” was included in all the strap lines listed on the previous page. “Mellow” was rejected as being incoherent with the Old Holborn brand.

“I see mellow meaning a lighter tobacco , Old Holborn is not mellow”

■ The following were also rejected fairly spontaneously;

- “Satisfyingly Smooth”
- “Smoothly Satisfying”
- “Golden Rolling Moments”

These were rejected by the majority because the word “smooth” was not perceived to be appropriate in describing Old Holborn tobacco;

“Old Holborn is not smooth, it has a kick”

“I find Old Holborn harsh on the throat, it’s not a smooth smoking tobacco”

The word “Golden” was immediately associated with Golden Virginia (mellow) and rejected.

■ The reactions to the following strap lines were positive;

- “Go Your Own Way”
- “When You Know What To Roll”
- “Greater Smoking Satisfaction”

“Go Your Own Way” and “When You Know What To Roll” were considered attractive by some Old Holborn loyalists and implied the user was a person of discernment and individuality.

“Greater Smoking Satisfaction” was perceived by a few as appositely describing the strength and taste of Old Holborn.

■ The following were the two most popular choices;

- Rolling In Flavour
- **The Handroller’s Choice**

“Rolling in Flavour” was considered by some to be “*clever*”. The word “rolling” could mean either; rolling your tobacco (“roll -ups”) or implying the tobacco is rolling in flavour. This strap line again emphasised the taste of the tobacco.

“**The Handroller’s Choice**” was the most popular strap line of all amongst loyalists and other brand users. It conveyed a sense of confidence and respect for the brand and the discernment of the user. Old Holborn was perceived to be an established and ubiquitous brand and did not appear to be “*trying too hard*”. The strap line supported the brand in its directness, simplicity and openness. It was not described as “*gimmicky*” or “*too clever*” and the message introduced a sense of the “*natural*” selection on the part of the user.

“Fits perfectly, everybody’s heard about Old Holborn”

“It hasn’t got flavour, mellow or any of those marketing gimmicks in it. It’s straight to the point”

5. Old Holborn New Pack Designs

5.1 Fundamental Requirements

The majority identified a number of fundamental requirements which they believed should be reflected in any new pack designs.

5.1.1 “Old Holborn” Brand Name

The majority perceived the brand name to be the cornerstone of the brand. It should have linkage to current pack design by being large, bold and traditional in style.

5.1.2 Colour

The primary colours of any new pack should have sufficient linkage to the old pack to be easily recognisable (blue and orange). These colours were universally accepted as belonging to the Old Holborn brand.

*“You must be able to recognise the pack on the shelf.
If you change the colour, old people will get confused”*

5.1.3 Tradition

The majority saw the linkage in colour and design of a new pack to the current pack as an important factor in supporting the needs of current loyalists. Other brand users also endorsed the view that any radical departure from the traditional pack image would be damaging to the brand.

5.1.4 Quality Statement

The pedigree of the brand promoted a sense of quality in the tobacco which remained consistent over the years and this was supported by the quality message on the pack.

5.1.5 Simplicity

The current Old Holborn pack is recognised by many by its simplicity of imagery.

6. Routes for New Pack Designs

6.1 Routes Overall

Respondents were shown three separate routes which were rotated across the groups (see Appendices for Rotations). The three routes were;

- Total Makeover - This route was the most radical departure from current pack design
- Facelift - This route retained some design similarities with the current pack
- Evolution - This route most resembled the current pack design

6.2 Individual Routes

6.2.1 Total Makeover

This route was identified by majority of Old Holborn and other brand users as being the most radical departure from the current pack design. It was described as looking “foreign”, and “comical” in a negative sense. Many expressed the perception that the route had gone “too far” and no longer reflected the traditional Old Holborn brand imagery.

■ The most positive aspects of the route were identified as;

Brighter Blue Packaging

This was perceived by the majority as a positive step forward from the current pack design.

Blue/Gold Margins

Compared to the white margins of the current pack, the majority believed the new blue/gold margins improved the look of pack quality.

Traditional Old Holborn Lettering

The traditional Old Holborn lettering in the name was perceived to be positive and this familiarity was important in retaining linkage to the old pack design.

Textured Vertical Lines

Many commented on the increased perception of pack quality by using the textured lines on the pack.

■ Certain aspects of the route were identified as being particularly negative;

Scenes

There was considerable rejection of the scenes in the individual executions. The colours (green/yellow) were not Old Holborn brand colours. These types of colours were seen as being more appropriate for a mellow tobacco. The country scenes themselves were perceived to be incoherent in the context of rolling tobacco advertising. Some commented on the “*comical*” nature of the scenes and believed this would embarrass Old Holborn smokers, who believed themselves to be serious tobacco smokers.

“Old Holborn Name”

Any interference in reducing or altering the impact and size of the brand name on the pack was considered to be detrimental to the brand.

Green/White Banners

The banners were perceived to be too small to contribute to the pack design. They looked unsophisticated and not impactful enough to carry any message successfully. The white banner in particular was perceived to be cheapening the pack image. The green banner introduced confusion and suggested a mellow (green) tobacco.

Dark Blue Primary Pack Colours

Dark blue was perceived to give the pack a more bland feel and dampened the character of the brand.

Large Leaves

Some of the larger leaves overwhelmed the pack designs (see Appendices for example - TM 4) The impact of the leaves was considered to be too overpowering by the majority.

Richard Lloyd & Sons

The need to promote the manufacturer on the pack was perceived to be a minor (although expected) factor in overall pack design. Block capitals to advertise the name were considered to be too impactful (dominating pack design) and the majority preferred the more subtle and stylish "italics" designs.

6.2.2 Facelift

The "Facelift" route contained elements of the traditional pack design and was far better received by the majority than the "Total Makeover" route. "Facelift" was described by many as "colourful" and "eye catching" without going overboard. The simplicity, modernity and linkage to current pack design was appreciated by loyalists and other brand users.

Although there was a traditional feel to the route many younger respondents praised it for its modernity.

■ The main positives identified in the route were;

Brighter blue and Orange Packaging

The brighter blue was again perceived positively by the majority. This blended well with the orange and had distinctive linkage to the current pack.

Scroll Banner (Arch)

The majority commented positively on the scroll effect of the Old Holborn banner (arch). This added a classical touch to the design and enhanced the look of Old Holborn brand name.

Leaves

Some of leaves were prominent in these designs, but not overbearing (FL12A). Many considered them to be a positive aspect of the pack design.

Strap Line Framing

The rectangular frame for the strap line enabled the message to impact considerably. The negative aspect of the framing was the internal green colour which was spontaneously associated with mellow tobacco.

Margins

The blue and gold margins improved the look of quality in the pack design.

Spacing

The simplicity of the designs gave the feeling of space on the pack and many respondents commented positively on this design element.

■ The most negative perceptions of the route were;

Lighter Orange

The majority generally enjoyed the brighter colours. However, the lighter orange used as the predominant colour was described as “*off putting*” and “*sickly*”.

Horizontal Lines

Some executions had gold horizontal lines around the leaves and this was considered by many to be too complicated and distracting.

Large leaves

As with the previous route, the large leaves were perceived to be too distracting and diluted the brand name.

Richard Lloyd and Sons

This again was identified as a negative when represented in block capitals.

6.2.3 Evolution

The appeal of this route lay in its familiarity to the current pack design. Loyalists in particular enjoyed these designs.

"It looks like the old pack, but someone has turned the lights on"

The traditional look of the pack was seen to be enhanced by colour and design changes.

■ The following were seen as improvements on the current pack;

Brighter Primary Colours

The brighter blue and orange pack colours were more impactful and less bland than the current pack colours.

Window (square)

The window (square) remained a prominent feature of the new pack designs. The darker blue colour within the window was seen by many loyalists as an improvement on the current pack colour.

"The window is eye catching. It draws you in"

New Elephant Design

The new more dynamic elephant design was considered to be positive in the context of this pack design.

Margins

As with previous route designs the gold and blue margins were commented upon positively by the majority.

Old Holborn name and Arch

The traditional combination remained popular.

Richard Lloyd & Sons

The manufacturer name printed in italics in black was considered coherent with the design image.

■ The main negatives recalled in this route were;

Coloured packs

The majority believed the primary colours of the pack should remain blue and orange. Any other colours or darker/lighter shades of blue would undermine the established nature of the brand colours and create confusion amongst loyalists.

Traditional Elephant

A few respondents commented positively on the traditional elephant. The majority believed the design to hold little impact and relevance to the tobacco.

6.2.4 OH (Special Edition)

These designs (OH Special Edition) produced a spontaneous, negative response from the majority of respondents. "OH Special Edition" was considered to be too modern and lacked coherence with the Old Holborn brand. The shortening of the Old Holborn name was perceived to undermine the most recognised means of promoting the brand.

6.3 Summary Of New Pack Design

The following is a summary of all the elements of the pack designs identifying examples of the positive and negative aspects of each element. Pictures of the selected new pack designs referred to in the summary can be found in the Appendices.

Primary Pack Colour

The majority of respondents rejected the non blue primary pack colours. The green pack colour of one Evolution execution immediately connected the pack with a milder tobacco. In the same route, a red pack was commented upon as looking "*similar to a pipe tobacco pack*". Other lighter and darker predominant colours throughout the routes were perceived as being variously "too strong" or "*too weak*".

The most acceptable primary blue colour was represented in the example EV1.

The textured effect of FL13 was perceived to enhance the feeling of pack quality.

Old Holborn Lettering

Respondents believed the lettering should remain as impactful as possible and therefore the large fonts (FL12A) were chosen in all the selected new pack designs. The black and yellow colour combination for lettering, in some executions, was seen as diminishing the

impact of the Old Holborn name. The black and white colour combination was chosen by the majority instead.

The gold shadow behind the lettering in the current pack design was not considered impactful enough to add to the new pack designs.

The majority of respondents did not believe in interfering with the traditional “Old Holborn” name. Any change in the name (small “Old”) was perceived negatively.

Window(square) and Arch

The window design was perceived by the majority as a traditional feature of the Old Holborn pack design. Most loyalists responded positively to keeping this design. Many commented on the improved darker blue colouring within the window. Other more radical window designs like TM were rejected.

The arch was seen by the majority as an important element in the pack design. The most favoured arch design for many was the scroll effect (FL12A), followed by the plain arch design (EV1).

Margins

The majority commented positively on the gold/blue margin designs like FL 13. The broken gold line margin designs were seen as less impactful.

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The majority believed the name of the manufacturer printed on the new pack designs should be traditional (italics) but discreet (F1 12A).

Leaves

Many perceived the leaves to add character to the pack image. The larger leaves (TM 4) were too radical in design. The smaller designs (FL 12B, EV 1) fitted in well with the overall pack design and had linkage to the current pack design.

Elephant Design

The traditional Elephant design (EV 1) was appreciated by a few loyalists. The majority believed the new design (FL13) introduced a dynamic element to the pack design which reflected the strength of the tobacco.

Strap Line Framing

The strap line framing in FL 12B was perceived to be impactful. However, many believed more consideration of the internal colour should avoid confusion (green = mellow). The strap lines on banners (flags) were seen as less impactful and unsophisticated. These were rejected by the majority.

6.4 Selected New Pack Designs

“Evolution” and “Facelift” routes were selected as coherent with the Old Holborn brand. Within these routes respondents selected their favourite executions. Respondents (majority loyalists), selected EV 1,2 and 9 from the “Evolution” route. These executions reflected the traditional design features of the current pack. Many other brand users selected FL 12A, 12B and 9 from the “Facelift” route. There was less traditional linkage to the pack in this route. Respondents perceived these executions to be modern and stylish without being too radical and unrecognisable from current brand imagery.

APPENDICES

- I RECRUITMENT QUESTIONNAIRE**
- II DISCUSSION GUIDE**
- III STRAP LINE EXAMPLES**
- IV ROTATIONS**
- V NEW PACK DESIGN EXAMPLES**

A

P

P

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D

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S

Q3. You say you smoke rolling tobacco, could I just check which brand do you buy and smoke yourself most often?

PIPE/ROLLING TOBACCO

GOLDEN VIRGINIA.....	9
OLD HOLBORN	10
SAMSON	11
AMBER LEAF.....	4
CUTTERS CHOICE	5
SWAN	6

RECRUITER INSTRUCTION

RESPONDENTS MAY RING MORE THAN ONE CODE, BUT TO QUALIFY FOR THE VARIOUS GROUPS ALL MUST RING THE CODES SHOWN BELOW AS FOLLOWS;

Groups 1 & 2 ALL RESPONDENTS MUST RING CODE 4 - GO TO **Q4**

Group 3 & 5 ALL RESPONDENTS MUST RING CODE 2 or 3 (50% of each per group) - GO TO **Q5**

Group 4 ALL RESPONDENTS MUST RING CODE 7 - GO TO **Q6**

Group 6 ALL RESPONDENTS MUST RING CODE 9 - GO TO **Q7**

Q4. You say you smoke XXXXX rolling tobacco nowadays, could I ask you about how many grams of this tobacco do you smoke a week?

LESS THAN ONE SMALL POUCH A WEEK (ie. < 12.5g)	1	CLOSE
<hr/>		
MORE THAN 12.5g BUT LESS THAN 25g (A MEDIUM SIZED POUCH) A WEEK ...	2	GO TO Q4
MORE THAN 25g A WEEK	3	

CLASSIFICATION SECTION

We need to speak to a cross section of the general public. Please help us to ensure we get an even balance by answering these final few questions.

Q1. Have you ever attended a market research group before?

YES A - Ask question 2
NO B - Ask question 4

Q2. When did you last attend a market research group discussion?

WRITE IN _____

If discussion attended in the last 12 months. CLOSE INTERVIEW. No more than 3 respondents should ever have attended a discussion before in any one group. If a respondent has attended a group discussion before - ASK Q3.

Q3. What was the subject of that discussion? WRITE IN _____

DO NOT RECRUIT IF ATTENDED A DISCUSSION ON THE SAME OR SIMILAR SUBJECT eg. cigarettes, cigars or tobacco.

Q4. What age were you last birthday? _____

Q5. How many children do you have living at home, if any, and what are their ages?

NUMBER OF CHILDREN _____ AGES _____

Q6. What is your current working/marital status?

WORKING FULL TIME	A	SINGLE	A
WORKING PART TIME	B	MARRIED/COHABITING	B
NON WORKING (not claiming benefit)	C	DIVORCED/SEPARATED	C
RETIRED	D	WIDOWED	D
UNEMPLOYED (claiming benefit)	E		
STUDENT	F		

NO MORE THAN 4 RESPONDENTS IN EACH GROUP WHO ARE EITHER STUDENTS OR UNEMPLOYED (CLAIMING BENEFIT).

Q7. What is the occupation of the main salary/wage earner (HOH) in your household?

OCCUPATION: _____
JOB TITLE/SOCIAL CLASS: _____

INTERVIEWER DECLARATION:

THIS INTERVIEW WAS CONDUCTED FACE TO FACE WITH THE RESPONDENT WHO IS NOT A RELATIVE OR FRIEND OF MINE.

INTERVIEWER'S SIGNATURE _____ DATE: _____

DRAFT DISCUSSION GUIDE JN 9725/ OH Draft I (09.12.97)

1. Background (5')

- Rules for the group
 - ... tape recorders, note takers, observers
 - ... code of confidentiality
 - ... working together, not to shout each other down. everyone to participate

2. The Status Quo (5')

- Respondents to introduce each other covering names, lifestyle, memorable event etc

Moderator to check recruitment criteria probing briefly;

- Smoking behaviour including;
 - ◆ Brand loyalty, (check repertoire RYO)
 - ◆ RYO, quantity smoked/per week
 - ◆ Smoking history

3. Market Mapping (10')

- Spontaneous sort of RYO tobacco packs with commentary (brand party), then prompt on following dimensions;
 - ◆ target audience
 - ◆ image and style
 - ◆ character of the brand
 - ◆ pedigree
 - ◆ taste
 - ◆ physical aspects of the pack (feel)

4. Old Holborn Exploration (15')

- *Using the current Old Holborn pack, discuss character of the brand and associated brand imagery including;*
 - ◆ image/style (stable)
 - ◆ target audience (incl age, male/female)
 - ◆ colour
 - ◆ lettering

- ◆ packaging
 - ◆ “Old Holborn” name
 - ◆ physical feel of the pack
- *Discuss with respondents the concept of a “graduate” brand (Old Holborn) of tobacco which “lighter” tobacco smokers move onto, in the same context as many beer drinkers start by drinking Lager and graduate to Bitter or Real Ale*
 - *Respondents to identify favourite strap lines on cards which reflect their perception of the current Old Holborn brand;*

Product	“Greater smoking satisfaction” “Mellow smoking satisfaction” “Satisfyingly smooth” “Smoothly satisfying” “Naturally mellow”
Product + Activity	“The mellow rolling experience” “Rolling in flavour” “For the mellow moment” “Golden rolling moments”
In Control	“Go your own way” “The hand rollers’ choice” “When you know what to roll”

5. Old Holborn Pack Designs (20’)

- *Respondents to be shown the three main routes,; “Evolution”, “Facelift” and “Total Makeover” using different rotations for each focus group (see Rotations).*

Within each route the moderator to explore the character of the pack presentations and pack detail;

- ◆ image/style
 - impact
 - understanding
 - character of the pack - young/old, trendy/conservative, etc.
 - target audience
 - longevity
 - linkage to old pack

- ◆ pack colours
 - background colours and colour variations (greens, reds)
 - associations
 - linkage
 - impact
- ◆ title designs -“Old Holborn”
 - lettering - style, colour, size, shadow
 - name framing - scrolls, rectangles, blocks, edges, colouring
 - framing - squares, rectangles, ovals, blocks
- ◆ design features - elephant (traditional/new), outdoor scenes, leaves
- ◆ detail characteristics - rules, margins , lines, texture. sunbursts
- ◆ strap line framing - lettering, shape, colour, scrolls, positioning, size
- ◆ RL&S - lettering, size, position

Moderator to identify preferred routes and individual presentations identifying main likes and dislikes of each selection

Once selections have been made, respondents to choose preferred strap lines which complement preferred pack presentations, giving reasons and rational.

6. Return to Market Mapping (10')

Respondents are to describe how/if their perception of the brand has changed by selecting the new pack design

7. GLOBAL EVALUATION (5')

Respondents to summarise giving overall impressions of;

- how the new pack designs/routes could affect perceptions of the brand (incl willingness to purchase) (OB users)
- how the new pack designs/routes affect impressions of the brand (loyalists)
- the aim of the manufacturer in changing the packaging of the brand

----- CLOSE AND THANK -----

Timings:

Background	5
Status Quo	5
Market Mapping	10
OH Exploration	15
OH Pack Designs	40
Return to Market Mapping	10
Global Evaluation	5
Total	<hr/> 90

STRAP LINES - JN 9725

PRODUCT

GREATER SMOKING SATISFACTION

MELLOW SMOKING SATISFACTION

SATISFYINGLY SMOOTH

SMOOTHLY SATISFYING

NATURALLY MELLOW

PRODUCT + ACTIVITY

THE MELLOW ROLLING EXPERIENCE

ROLLING IN FLAVOUR

FOR THE MELLOW MOMENT

GOLDEN ROLLING MOMENTS

"IN CONTROL"

GO YOUR OWN WAY

THE HANDROLLER'S CHOICE

WHEN YOU KNOW WHAT TO ROLL

ROTATIONS JN 9725

	1st SHOWN	2nd SHOWN	3RD SHOWN
GROUP 1 OH 35-54	Total Make-over	Evolution	Face Lift
GROUP 2 OH 25-34	Evolution	Face Lift	Total Make-over
GROUP 3 GV 35-54	Face Lift	Total Make-over	Evolution
GROUP 4 GV 25-34	Evolution	Face Lift	Total Make-over

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OLD HOLBORN

GREATER SMOKING SATISFACTION



TOBACCO SERIOUSLY DAMAGES HEALTH

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OLD HOLBORN



GO YOUR OWN WAY

TOBACCO SERIOUSLY DAMAGES HEALTH

TM

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OLD HOLBORN



ROLLING IN FLAVOUR

TOBACCO SERIOUSLY DAMAGES HEALTH

Richard Lloyd & Sons



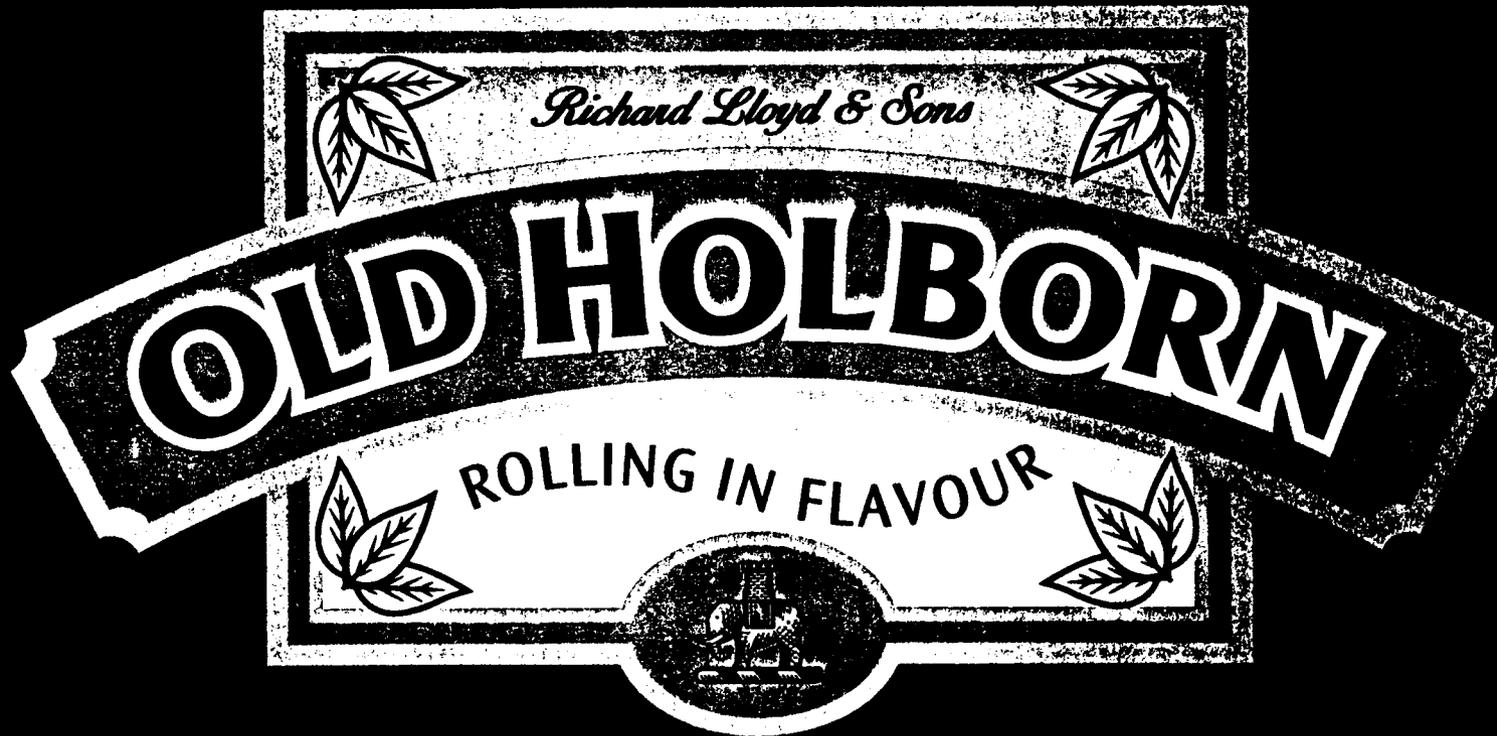
ROLLING IN FLAVOUR

TOBACCO SERIOUSLY DAMAGES HEALTH

Richard Lloyd & Sons



TOBACCO SERIOUSLY DAMAGES HEALTH



TOBACCO SERIOUSLY DAMAGES HEALTH

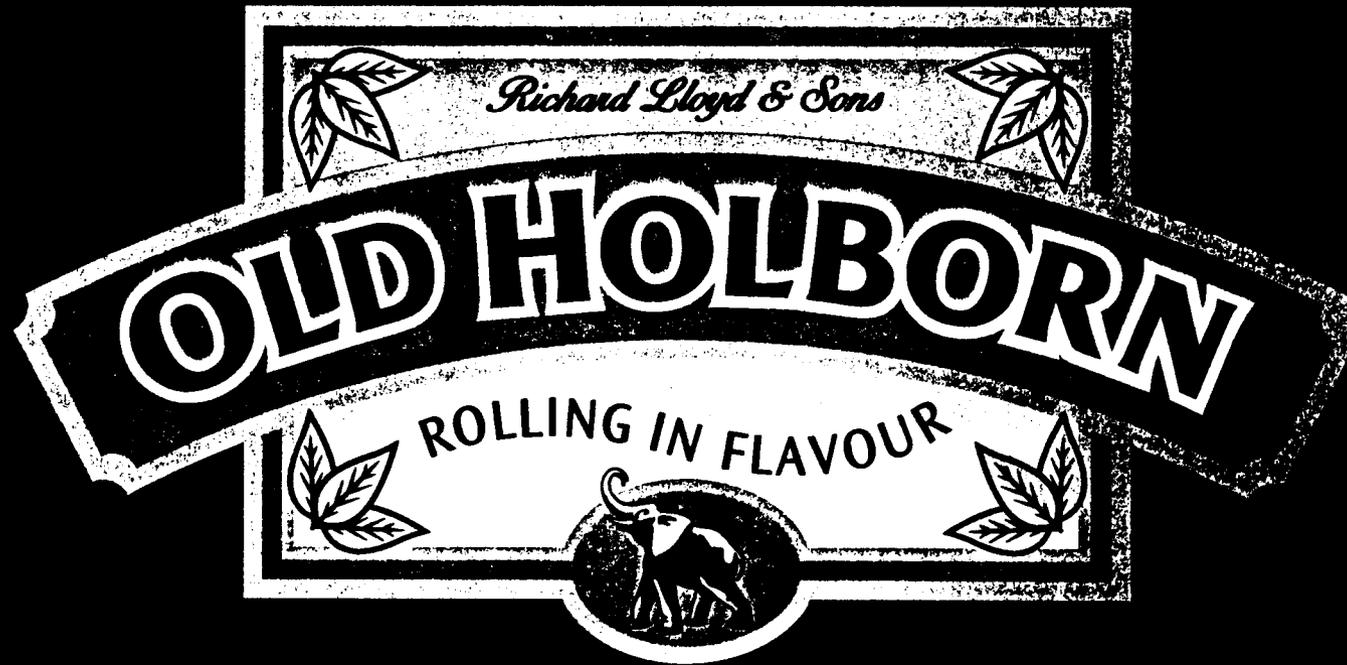
Richard Lloyd & Sons

OLD HOLBORN

ROLLING IN FLAVOUR



TOBACCO SERIOUSLY DAMAGES HEALTH



TOBACCO SERIOUSLY DAMAGES HEALTH

OLD **H**OLBORN

SPECIAL
EDITION

TOBACCO SERIOUSLY DAMAGES HEALTH

O.H. SPECIAL EDITION