

**EMBASSY NO.1, REGAL  
AND  
SUPERKINGS:  
BRAND REVIEW**

**QUALITATIVE RESEARCH**

**PRESENTATION NOTES**





# **EMBASSY NO.1, REGAL AND SUPERKINGS: BRAND REVIEW**

## **QUALITATIVE RESEARCH**

### **PRESENTATION NOTES**

**To: ITL and LHS**

**Date: 23 June 1998**

## **BACKGROUND AND OBJECTIVES**

uncertainty over the future of tobacco advertising and marketing

review of brands in order to inform medium-to-long-term marketing strategies

qualitative research programme to "audit" three ITL brands: Embassy No 1, Regal and Superkings

specifically to investigate:

- purchase behaviour, consumption and relative loyalty
- rational product benefits
- emotional benefits of brand
- user imagery
- brand personality

research is specifically diagnostic rather than developmental

## METHOD

4 standard length focus groups per brand (8th-16th June 1998)

### *Embassy No 1*

1	x	18-22	female	C1C2	Birmingham	1	x	18-22	male	C2D	Manchester
1	x	25-35	female	C2D	Manchester	1	x	25-35	male	C1C2	Birmingham

### *Regal*

1	x	18-22	female	C2D	Newcastle	1	x	18-22	male	C1C2	Cardiff
1	x	25-35	female	C1C2	Cardiff	1	x	25-35	male	C2D	Newcastle

### *Superkings*

1	x	45-54	female	C2D	Nottingham	1	x	45-54	male	C1C2	London
1	x	25-34	female	C1C2	London	1	x	25-34	male	C2D	Nottingham

6 respondents per group users of ITL brands; 2 respondents users of competitive brands  
(B&H, Silk Cut, Marlboro & Raffles, Berkeley 100s)

## PURCHASE PROCESS

65 %    single 20 packs                      18%    single 10 packs                      17%    2+ 20 packs

bulk purchase for price savings & convenience

resistance to bulk purchase due to cash-flow & consumption control (cf. 10 packs)

58%    CTN/corner shop                      12%    supermarket                      6%    petrol station

6%    off-licence                      16%    anywhere                      4%    grey market

mainly daily purchase except petrol/supermarket

20%    solus                      30%    + newspaper                      20%    + glucose-boost product

16%    + grocery items                      7%    + chewing gum                      7%    + other

grey market Newcastle:	Regal and ryo	£2 x 20	£20/£22 x 200	
	Nottingham	No 1, B&H, S'kings	£2.30-£2.50 x 20	£21 x 200
	London	NB not S'kings	£20 x 200	
	Cardiff	no experience	(C1C2 ??)	

few familiar names

Superkings

Raffles

Marlboro

Berkeley "red/blue/green" use of colour code to designate variant

Regal Regal Kings/Regal King Size (Newcastle)  
Regal King Size/Embassy Regal (Cardiff & Manchester)

No 1 Embassy No 1/Number Ones (esp Regal smokers)/Embassy (not regional)  
Embassy Red = filter

Benson & H B&H/Bensons/Benson/Bennies (not regional)

Silk Cut Silks (London)

Lambert & B Lamberts/Lambert & Scuttler/Lammie Bammies/Larrys & Barrys

use of/seeking out cut-price shops is sporadic

price sensitivity is generally higher amongst Superkings smokers

recognition/identity

no problems with pack recognition at p.o.s.

NB leading brands in their areas: multi-facing eye-level racks

distinctiveness of mainstream premium packs

Superkings in London can be recessive (pack? racking?)

cello-wrap

noticed generally post-purchase

- \* price discounts (esp. Superkings and L&B)
- \* promotions (Silk Cut competition; No 1 snooker cue promo; Gratis catalogue)
- \* stick quantity (vending machines)

presents no threat to premiumness (since generally not price-led for Regal/No1)

Superkings = part of brand offer

## PROFILES

**Regal Newcastle males:** electrician, lab assistant, fitter, assistant pub manager, ship repairer, coalman, rent collector, builder

open, friendly, sharp, not losers, no resentment

**Regal Newcastle females:** machinist, hairdresser, student, shop assistant, care workers

initially reserved, but bright, sharp, self-deprecating

**Regal Cardiff males:** security guard, salesman, barman, assistant shop manager, students

reserved, lacking self-confidence, but intelligent

**Regal Cardiff females:** dental nurse, child minder, shop assistant, lab technician, student, museum assistants

shy, average intelligence, conservative, not "party animals"

No1 Birmingham males: housing supervisor, car salesman, builder, cook, office workers,  
factory supervisor

ordinary, down-to-earth, open but conservative

No1 Birmingham females: housewives, student, nursery nurse, shop assistant, care workers

not given to much self-reflection, but quite outgoing despite shyness

No 1 Manchester males: artisan, chef, barman, office clerical, baggage handler, graphic designer,  
shop assistant

optimistic, see selves as sophisticated, aspirational within realistic limits

No 1 Manchester females: housewives, domestics, care assistants, administrative workers

mix of aspirational and accepting, self-deprecating

## CONSUMPTION PATTERNS

female 25-35	16 per day	12 years	Regal	9/10 years	No 1	6/15 years
male 25-35	22 daily	13 years	Regal	13/14 years	No 1	6/13 years
female 18-22	14 daily	6 years	Regal	6/7 years	No 1	4/5 years
male 18-22	16 daily	6 years	Regal	4/6 years	No 1	3/5 years

Regal is frequently a starter cig to which loyalty is intense (esp. Newcastle);

new vitality for No1 suggested; not a starter cig in the eighties (but becoming so) so loyalty not as deep

60% have pre-Regal history (however brief):

30% include B&H      others = SC, L&B, Marlboro, Park Drive, Gold Leaf

70% have pre No 1 history:

50% include B&H      16% Silk Cut      others = Marlboro, Dunhill, L&B, JPS, Regal

switching rationales:

- \* less strong/less harsh (esp. cf. B&H)
- \* peer group/family conformity
- \* consumption control (esp. cf. Silk Cut)

## RATIONAL DESCRIPTORS/BENEFITS

### *Regal & Embassy No 1*

- product satisfaction

not as harsh as B&H	smoothness of smoke	balance of mild & strong	consistent smoke
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- product quality

doesn't burn throat	doesn't burn quickly	well-packed/compact	reliable
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no leaking smoke	no crackling/sparking	paper & filter (cf. cheap)	premium price
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"untampered with" (no filter holes, no toasting, fewer chemicals)

- widespread availability

- constant loyalty scheme

### product differentiation:

cf. B&H      not so harsh, no twigs, moister tobacco

cf. S Cut      strong enough to taste

cf. M'boro    not so harsh, different tobacco & process

## *Marlboro*

- strong unpleasant smell
- strong, unacceptable taste (heavy on chest)
- different tobacco?/different process

BUT evidence, esp. from younger males, that Marlboro variants, esp. Lights, are acceptable and not strongly differentiated - a potential threat?

## *Silk Cut*

- no taste delivery
- no nicotine hit
- physical discomfort through effort to draw
- low-tar
- no sense of smoking
- so smoke too much
- "tampered with" (esp. Regal)

### ***B&H***

- too strong/too harsh
- bitter taste
- over-tightly packed
- too dry
- thicker smoke

### ***Regal users on No 1***

- difference? stronger? milder? confusion? but premium

### ***No 1 users on Regal***

- stronger than No 1
- lesser quality/cheaper version of No 1 but remains premium

**No1 = more acceptable substitute for Regal smokers than vice-versa**

## BRAND MAPPING

No 1 users	Regal users	No 1 users
<i>popularity</i>		<i>market sales</i>
B&H	Regal	B&H (No 1 - young male Manch)
No1 (male)/ SCut (female)	B&H	No1/SCut (B&H)
SCut (male)/ No1 (female)	No 1 (Cardiff)/ SCut (female Newc)/ M'boro (male Newc)	SCut/No1 (SCut)
M'boro (older)/ Regal (younger)	SCut (Cardiff)/ No 1 (Newc)	M'boro
Regal (older) M'boro (younger)	M'boro (Cardiff) M'boro (female Newc) SCut (male Newc)	Regal

regional, age and gender variations demonstrate micro-community currency role of cig brands

No 1 users	Regal users	No 1 users	Regal users
<i>stand-out</i>		<i>pack appeal</i>	
B&H	Regal (Newc)	B&H (Brum)/ M'boro (Manch)	SCut (female)/ M'boro (male)
M'boro	n o	M'boro (Manch)/ B&H (Brum)	Regal
No 1	p a t	SCut (male) No 1 (female)	No 1
Regal (Brum) SCut (Manch)	t e r	SCut (female)/ No 1 (male)	B&H (male)/ M'boro (female)
Regal (Manch) SCut (Brum)	n	Regal	SCut (male) B&H (female)

NB low rankings for Regal from No 1 smokers

high rankings for Regal from Regal smokers reflects loyalty

appeal of Marlboro packs reflects growing interest

brand identity is closely associated with packs and can only continue to be

blue/red stripe is only memorable/identifiable feature of Regal/No 1 packs

crown/crest is recessive, secondary signifier and insufficient for brand identification

## EMOTIONAL BENEFITS

### *Embassy No1 & Regal*

- currency role

social acceptability    social conformity    participation

- popularity

- down-to-earth straightforwardness

for everyman    people like me (ordinary)    no airs & graces

- reassurance

quality    reliability    reputation    tradition    longevity

- nostalgic connection (early loyalists)

personalisation    "old friend"    pride in choice (generic?)

- not other brands

B&H - becoming passé    S Cut - wimpish    M'boro - posing    Regal - old brand

NB context of rather macho attitude to smoking

*Regal only*

- badge value
  - in work "real" traditional/manufacturing work
- irreverence
  - sourced from advertising campaigns ??
- confirmation of regional identity (Newcastle)
  - symbolises Geordie pride

## USER IMAGERY

<i>Silk Cut</i>	<i>Marlboro</i>	<i>B&amp;H</i>	
females (pregnant)	students	males	
homosexuals/wimps	foreigners	heavy smokers	
social smokers	Americans (cowboys)	Regal users	No 1 users
not serious	bikers	older	lads culture
health-conscious	rock biz people	hard/macho	loutish
quitters	posers	heavy-drinking	pliss-heads
(not trustworthy)		blue collar	wide-boy
		Southern	Cockney

**NB** the white-collar, aspirational, businessman imagery traditionally attaching to B&H is now residual  
the gold is tarnished; B&H is no longer a signifier of sophistication

**Embassy No 1**

**Regal**

*Regal users*

*No 1 users*

*Regal users*

*No1 users*

older

young

Northern

much older

Southern

working-class

folkloric North

white collar (Cardiff)

ordinary Joe

male

honest/down-to-earth

heavy smoker

moderate appetites

seeks to conform

not image-conscious

self-motivated not seeking approval

***No 1 IS***

straightforward

traditional

dependable

British & English

(a laugh)

***ISN'T***

weird

rough

rich

cheeky

old-fashioned

taste/quality/popularity/sociability

***Regal IS***

practical

straightforward

British & English

a laugh

clubby

traditional

***ISN'T***

classy

weird

stylish (esp Newc)

old-fashioned

pretentious

taste/sociability/popularity

## IN SUMMARY

Both Embassy No1 and Regal have very similar profiles:

straightforward/honest

down-to-earth

unpretentious

everyday

middle of the road

everyman (not posh)

not aspirational ( NB Manchester No 1)

not fashion-/image-led

(Regal) fun/irreverent

Product strengths

smooth/medium strength

availability

premium quality

Major emotional benefits

conformity

participation

NB decline of B&H

rise of Marlboro (esp. Lights)

## **SUPERKINGS PROFILES**

**Nottingham females:** housewives, cleaners, cook, school assistant, childminder

**rough, unfocussed, insecure, brazen, inarticulate**

**Nottingham males:** computer technician, nurse, decorators, stock controller, shop assistant, caretaker

**bright, open, straightforward, down-to-earth, limited articulacy**

**London females:** MBA student, hospital administrator, salesperson, computer trainer, fashion stylist, assistant manager BBC, secretary, airline groundstaff

**vibrant, opinionated, imaginative, perceptive, communicative, anti-bullshit**

**London males:** personnel officer, software engineer, self-employed carpet business, office manager, musician, sales rep, interior decorator, estate agent

**cynical, slightly patronising, articulate**

## CONSUMPTION PATTERNS

female 25-34	11 daily	13 years	Superkings	18 months
male 25-34	20 daily	11 years	Superkings	30 months
female 45-54	29 daily	30 years	Superkings	24 months
male 45-54	15 daily	26 years	Superkings	24 months

NB relative recency of conversion & no evidence of use as starter cig

all have extremely varied histories, frequent switching and breaks from smoking:

B&H 53%                      SCut 22%                      Marlboro 19%                      others 56%

mainly premium brands but also cheap/budget brands (C2D)

most recent migration generally from B&H and SCut

switching rationales:

price (inc. vfm/length)                      currency                      taste (mild)

NB loyalty is far less rooted with this brand than Regal/No 1

## RATIONAL DESCRIPTORS/BENEFITS

### *Superkings*

non-premium price

milder than B&H, stronger than SCut

value for money due to length: less waste, longer-lasting

more satisfaction cf. cheaper brands

taste: not rough, smooth, easy to draw, sufficient satisfaction

widest availability within category

"they do the job"

NB interested in nicotine hit/use to relieve stress rather than quality/enjoyment

also, unfamiliarity with category and other brands

assumption in London that Raffles & Berkeley are similar to Superkings

they are seen as budget not mid-price in Nottingham, so not competitive (minimal awareness of Raffles)

*Raffles:* rougher, drier ??

*Berkeley:* dry, harsh, cheap taste ??

## BRAND NAMES AND PACKS

consequently, image/perceptions derive from names & packs

*Superkings*

honest/self-describing

down-to-earth

quality (black/gold)

straightforward

honest

**BUT**

old-fashioned/formal

*Berkeley*

pretentious

old-fashioned

posing unsuccessfully

packs

supermarket brand

poor quality/naff

absence of style

*Raffles*

posh/upmarket

frivolous

untrustworthy

death/doom (cf JPS)

dull/plain

dishonest

**BUT**

modern/slick (London fem)

both Raffles & Berkeley have redesigned recently

Superkings to consider re-design without compromising core values?

key features = black & gold, stripes, sideways brand name

## EMOTIONAL BENEFITS

### *Superkings*

- non-premium without signalling cheap (poverty)
- socially acceptable
- usable as currency
- most popular of category and first of category
- honesty & straightforwardness
- neutrality/lack of pretention in bullshit category
- sense of femininity (length - London only)

## USER IMAGERY

### *Superkings*

all ages

everyman

w-class/manual

busy people (length)

down-to-earth

sociable, outgoing,  
bit of a lad

### *Raffles*

older female

hairdresser

flash Harry

extravert

trying & failing to pose

### *Berkeley*

older downmarket female

serious smoker

cost-conscious

OR

market newcomer who  
fails to recognise codes

## BRAND PERSONALITIES

NB much deriving from pack & name

### *Superkings*

Mondeo/Mustang/Capri

m.o.r. + sporty hint

France/Spain

unpretentious/  
comfortable

### *Raffles*

Probe/Peugeot 205

superficially flash  
but naff inside

Lake District/Scotland

uninvolving/pretentious/  
superficial

**BUT**  
appeals to C1 female  
(London)

### *Berkeley*

Skoda/Reliant/Morris Minor

old-fashioned

OR "fake" 4x4 (Vitara)

Butlin's

daytime/boring/factitious

**BUT**  
appeals to C2D female  
(Nottingham)

Superkings IS:	economical	practical	straightforward	dependable	traditional
and ISN'T:	weird	rich	pretentious	classy	

## IN SUMMARY

Superkings = a value for money proposition

cheaper than premium with acceptable mild taste

Its lack of pretention (implicit in name and pack) is key to its success in a category riddled with pretention.

Raffles & Berkeley are only serious competitors in the South.