Title: How tobacco companies in the United Kingdom prepared for, and responded to, standardised packaging of cigarettes and rolling tobacco

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ABSTRACT

Introduction As a result of the Standardised Packaging of Tobacco Products Regulations and Tobacco Products Directive, all packs of cigarettes (factory-made and hand-rolled) in the United Kingdom must be drab brown, display pictorial warnings on the principal display areas, and contain no less than 20 cigarettes or 30 grams of tobacco. The legislation was phased in between May 2016 and May 2017. Our objective was to monitor pack, brand and product changes pre- and post-implementation.

Methods Our surveillance of the cigarette market involved a review of the trade press, a monthly monitor of online supermarkets, and regular visits to stores, from May 2015 to June 2017.

Results Pre-standardised packaging there were changes to the pack graphics (e.g. redesigned packs and limited-editions) and pack structure (e.g. re-sealable inner foil), and the issue of a number of re-usable tins. Post-standardised packaging, changes included newer cigarette pack sizes for some brand variants (e.g. 23 and 24 packs). Changes to the branding pre-standardised packaging included brand extensions, and post-standardised packaging included brand and/or variant name change, often with the inclusion of colour descriptors, and brand migrations. Product changes pre-standardised packaging included the introduction of novel filters (e.g. filters with two flavour-changing capsules, tube filters, firmer filters, and filters with granular additives). There was non-compliance with the legislation, with slim packs, which are not permitted, on sale after standardised packaging was implemented.

Conclusions Our findings highlight the need to monitor developments in markets introducing standardised packaging, and have policy implications for countries considering this measure.

INTRODUCTION

Packaging has long been an important marketing tool for tobacco companies, but with many countries implementing comprehensive bans on tobacco advertising, promotion and sponsorship, the pack has become the key marketing driver.[1] Even for countries that no longer permit the open display of tobacco products within the retail environment, the packaging remains a crucial communications tool for tobacco companies given its ability to function beyond the point-of-sale; indeed it is the role of packaging, post-purchase, that is most important for continued relationships with the brand.[2]

Some countries have attempted to reduce the promotional power of the pack by introducing plain (or standardised) packaging. Following Australia in December 2012 and France in January 2017, the United Kingdom (UK) became the third country to fully implement standardised packaging. The Standardised Packaging of Tobacco Products Regulations[3] and the Tobacco Products Directive (TPD),[4] which was incorporated into UK law through the Tobacco and Related Products Regulations,[5] were phased in between 20th May 2016 and 20th May 2017. This legislation requires cigarettes and rolling tobacco, which constitute most of the tobacco market in the UK, to come in drab brown coloured packs. These drab brown packs must also display pictorial health warnings on at least 65% of the principal display areas; these warnings must be at least 52mm wide and 44mm high. In addition, one general warning (Smoking kills – quit now) and one information message (Tobacco smoke contains over 70 substances known to cause cancer) must cover at least 50% of the secondary display areas, start from the bottom of the pack, and have a minimum width of 20mm. By specifying minimum dimensions for the warnings and information message the legislation means that slim cigarette packs are not compliant. Cigarette packs must be cuboid shaped, although bevelled or rounded edges are permitted. Tobacco products are not allowed to feature any other markings or financial incentives (including price-marks), or information which promotes a product or encourages consumption by creating an erroneous impression about its characteristics (e.g. that it is less harmful than other brands) or any reference to taste, smell or flavour. The legislation also sets a minimum pack size of 20 sticks for factory-made cigarettes and 30 grams for hand-rolling tobacco.

Australia was the first country to introduce plain packaging. Scollo et al[6] identified five market trends before, and following, plain packaging being introduced in Australia. First, tobacco companies used the packaging to reassure consumers about product quality and taste through explicit written labels and implicit graphic designs emphasising that while the pack was changing the product would remain the same. Second, tobacco companies often revised brand variant names by including colour descriptors, using evocative terms, or making them longer, possibly to displace more of the brown pack space with lettering.[6] Third, tobacco companies appealed to price-conscious consumers through the introduction of 'super-value' brands, extra length cigarettes, and larger packs offering a cheaper cost-per-cigarette or 'bonus' cigarettes. Fourth, tobacco companies brought new products to the market, such as cigarettes consisting of tobacco mixed with mint leaves, and several new brand variants with flavour-changing capsules in the filter. Finally, they rationalised their product portfolios by removing less popular brands and pack sizes with low market share.[6]

Similar to Scollo et al[6], in this study we use our routine surveillance of the cigarette market in the UK, which is dominated by Japan Tobacco International (JTI) and Imperial Brands, with approximately 80% of the market between them, with Philip Morris and British American Tobacco (BAT) each having less than 10% market share,[7] to explore how tobacco companies responded to the Standardised Packaging of Tobacco Products Regulations and TPD.

METHODS

Three approaches to data collection and routine surveillance were undertaken between May 2015 and June 2017: (1) A review of the trade press; (2) An audit of supermarket websites; and (3) Visits to retailers. Employing multiple strategies helped us to understand pack and product developments, including the brands on offer.

Review of trade press

Paper issues of four magazines produced for retailers of tobacco products, such as off-licenses, supermarkets, convenience stores, petrol/gas stations and wholesalers, were reviewed: *The Grocer* (a weekly magazine), *Convenience Store* (a fortnightly magazine), *Forecourt Trader* and *Off Licence News* (monthly magazines). A search for tobacco content was also made on the website www.TalkingRetail.com. The collection was reviewed and relevant data extracted into a table, including the citation, any brand data, the tobacco manufacturer, and the product and pack developments featured. Analysis of the trade press provides important insight into developments within the tobacco market and the ways in which tobacco companies promote their products.[1,8]

Audit of supermarket websites

An audit of supermarket websites was conducted. The audit sampled the four largest supermarkets that sell tobacco products in the UK (Tesco, Asda, Morrisons, and Sainsbury's) and which account for approximately 70% share of the general grocery market.[9] The audit was conducted on the same dates each month (23rd - 25th). At each visit the product name, price, and item listing details (including product image) were captured using screengrabs and data indexed in a table. The strength of using supermarket websites is that data is convenient and accessible, no purchase is necessary, a large range of products can be analysed and tracked, and images can be taken without disruption to the retailer.[10]

Visits to retailers

Informal visits to retailers in Scotland were undertaken by the research team. These visits occurred once a month and, although retailers were selected by convenience, included supermarkets, independent retailers, convenience stores, forecourt traders, and off-licenses in both urban and suburban areas. The purpose of the visits was twofold: 1) to purchase packs identified as of interest through the trade press or supermarket websites, and 2) to allow informal discussion with retailers about their knowledge of new products, pack developments and brand changes. As the nature of any discussion with retailers was informal, no pre-set questions were used. Instead, discussions were purposively based on known pack, product or brand developments and any other examples that retailers suggested that we may be interested in. Research has identified retailers as important for understanding tobacco company practices.[11]

RESULTS

Packaging

Graphical design: With respect to changes to the pack graphics, eight pack redesigns were observed between May 2015 and March 2016 for brands or brand variants of cigarettes (Camel Blue, Chesterfield, Marlboro Touch, Natural American Spirit) and rolling tobacco (Amber Leaf Signature Blend, Golden Virginia, Holborn, Marlboro Gold). These redesigns were typically aimed at modernising the brand, communicating a premium experience and quality, or drawing on a brand's heritage.[12-14] Limited-edition packs were introduced for at least five cigarette brands between May 2015 and April 2016. Interestingly, limited-edition packs were introduced for at least six cigarette brands between May and July 2016, with five of these owned by JTI, see Figure 1. As all packs produced after 20th May 2016 had to be in standardised packs, and we were unable to obtain any of these limited-edition pack designs in shops until June 2016, tobacco companies, and particularly JTI, had clearly planned for these packs to appear on the market after the start of the phase-in period.

Figure 1: Limited-edition cigarette packs purchased during the phase-in period

Structural design: Philip Morris International introduced a re-sealable foil called 'Pro-Seal' for all Marlboro variants in July 2016 in order 'to keep the last cigarette as fresh as the first'.[15] Pro-Seal differs from BAT's innovative and successful Reloc pack in that it is attached to the inside of the lid and is not manually re-sealable, instead opening and closing with the pack (Figure 2). It was noted within the trade press that Pro-Seal was 'designed to give the premium cigarette brand more of an edge despite the plain packaging environment',[16] with nothing in the regulations preventing the foil from being used in this way.

Figure 2: Innovative use of the inner foil: Dunhill Reloc and Marlboro Pro-Seal

Various brands of rolling tobacco have pouches that are re-sealable after opening, with the intention to maintain the freshness of the tobacco for longer. While re-sealable pouches of rolling tobacco are not new to the UK market,[1] their design allows consumers the opportunity to cut off the flap that contains both the pictorial warnings. The result is a re-sealable pouch displaying only the general text warning on one side and the information message (upside-down) on the other, see Figure 3.

Figure 3: Amber Leaf rolling tobacco re-sealable pouches (front and back), featuring text-only messages, with the flap containing both the pictorial warnings removed

While bevelled and rounded-edged standardised cigarette packs are compliant with legislation in the UK (Figure 4), slim packs are not. The slim packs for Alluvé Lilac, Alluvé Green, Silk Cut Choice, Vogue Bleue and Vogue Original Green, all on sale in June 2017, were non-compliant because the width of the lateral surfaces of these packs (12mm) was less than the minimum required (20mm).

Figure 4: From left to right, standardised cigarette packs with rounded or bevelled edges (compliant), and a slim pack with the width of the lateral surfaces (12mm) less than that required (20mm) (non-compliant)

Tins: From April 2016 to January 2017, all four leading tobacco companies introduced limited-edition embossed tins for certain rolling tobacco variants (Golden Virginia 50g in April 2016; Cutters Choice Extra Smooth 12.5g in May 2016; Amber Leaf 12.5g in June 2016) or cigarette variants (Marlboro Gold and Marlboro Red 10 packs in January 2017), see Figure 5.

Figure 5: Tins for rolling tobacco and cigarettes issued between April 2016 and January 2017

Pack size: Prior to May 2015 most cigarette brands came in more than one pack size, with packs containing 10 cigarettes very common within the value, mid-priced and premium segment. Premium cigarette brands also came in packs containing 20 cigarettes, whereas most value or mid-priced cigarette brands came in packs containing 19 cigarettes (e.g. Berkeley, Carlton, Chesterfield, JPS, Lambert & Butler, Mayfair, Players, Richmond, Royals, Sovereign, Sterling, Windsor Blue, Winston) or 18 cigarettes (e.g. Ashford, Pall Mall, Rothmans). Despite the forthcoming ban on packs containing less than 20 cigarettes, from May 2015 on tobacco companies continued to introduce brands or brand variants in packs of 18 or 19 (e.g. 18 packs of B&H Blue King Size and 19 packs of Carlton Menthol Superkings).[17] They also used 17 packs for the first time, which were introduced for the Sovereign range in October 2015 in order to remain at the forefront of the 'super value' segment[18,19]; 17 packs were subsequently introduced for the Sterling range in November 2015, B&H Blue and Sky Blue in February 2016,[20] and the Rothmans range in March 2016.

As with cigarettes, most rolling tobacco brands come in more than one pack size, with standard pack sizes at the start of the study period 12.5g, 25g and 50g. Prior to May 2015 most rolling tobacco brands included packs containing less than the smallest of these pack sizes: 5g (Himalaya), 8g (Golden Virginia Smooth), 9g (Gold Leaf, Holborn Smooth, JPS Silver, Sterling) and 10g packs (Amber Leaf Signature Blend, Cutters Choice A True Blend, Cutters Choice Exquisite Blend, Cutters Choice Smooth, Pall Mall). Although packs containing less than 30g were banned as of May 2017, from May 2015 on tobacco companies continued to introduce packs with less than 12.5g for new brands or brand variants (e.g. 8g packs for Pall Mall and Players Red, and 9g pack for JPS Players). BAT brought the first 30g pack to market in August 2015 for Cutters Choice Extra Smooth.[21]

There were some changes to the number of cigarettes in packs that occurred only after they came in standardised packs. BAT introduced larger pack sizes for some brand variants (e.g. Pall Mall Double Capsule XL 23 pack; Rothmans XL 24 pack), see Figure 6, which may have been to aid brand differentiation or lower the price per stick.

Figure 6: Larger (more than 20 sticks) cigarette pack sizes

Branding

New brands: Some rolling tobacco brands new to the UK were brought to market, including Bentley in August 2015 and Amsterdamer in May 2017. At £9.13 for 30 grams, Amsterdamer was the lowest priced rolling tobacco product available in Asda, the only supermarket stocking this brand.

Brand extensions: New brand variants for cigarettes (JPS Triple Flow, Lucky Strike Gold) and rolling tobacco (Golden Virginia Sunrise, Golden Virginia Midnight, Natural American Spirit Yellow) were identified between July 2015 and November 2016; the two Golden Virginia variants were renamed Bright Sunrise and Bright Midnight when sold in standardised packs.

Brand or brand variant name change: There was some evidence of brand name change, e.g. Allure became Alluvé in May 2017, after the brand starting appearing in standardised packs. In this case, the brand owner (von-Eicken) may have been concerned that Allure would be considered a name which promotes the product and would therefore be in breach of the legislation. Similarly, with 'Natural' not permitted, Natural American Spirit became American Spirit in October 2016.[22]

Changes to variant name were common for most brands, as was the inclusion of colour descriptors. With flavour and taste descriptors no longer permitted, all companies changed 'Menthol' to 'Green' (e.g. Richmond Menthol became Richmond Green) and 'Smooth' typically became 'Blue', 'Bright Blue' or 'Sky Blue' (e.g. Sterling Smooth became Sterling Blue, Carlton Smooth Blue became Carlton Bright Blue, and Mayfair Smooth became Mayfair Sky Blue). For many 'Full Flavour' products, a colour descriptor was added to the name (e.g. Royals King Size became Royals Red) or additional descriptors such as 'Real' or 'Original' where colour was already included within the name (e.g. JPS Red became JPS Real Red, Superkings Black became Superkings Original Black).[23] Other variant name changes have been the inclusion of novel descriptors such as ‘Legendary’ (JPS Legendary Black).

In terms of the style of cigarette, as ‘King Size’ is standard most companies no longer included this on packs, with a few exceptions (e.g. Berkeley King Size, Mayfair King Size), but they generally included ‘Superkings’ on the pack for these products.[23] With the term ‘Superslims’ not permitted, this was removed from packs for these products (e.g. Silk Cut Superslims Choice became Silk Cut Choice).

Fewer changes were identified for rolling tobacco brands, although with ‘Smooth’ not permitted, some variant names changed (e.g. Cutters Choice Smooth became Cutters Choice Original, and Cutters Choice Extra Smooth became Cutters Choice Extra Fine).

Brand rationalisation: There was evidence of brand rationalisation, i.e. a reduction in the number of brands on offer, with a number of brand migrations post-standardised packaging, e.g. Consulate Menthol and St. Moritz Menthol are now under the Dunhill brand (Dunhill Consulate, Dunhill St. Moritz). Two other brands, Players and Windsor Blue, continued their migration to JPS, with the brand names on packs now JPS Players and Windsor Blue JPS. While these brand migrations started prior to the survey period, with the inclusion of the words John Player Special or JPS on packs of Player’s and Windsor Blue before May 2015, it is only post-standardised packaging that the change in brand name has become apparent. There are now 19 cigarette brand variants within the JPS family.

Product

New capsule cigarette variants: While cigarettes with a flavour-changing capsule in the filter were first released in the UK in 2011, with at least seven capsule brand variants available on the market prior to May 2015,[8] several new capsule variants were introduced between May and September 2015 (JPS Crushball, L&B Ice Blast, Players Crushball, Sovereign Dual). These included, for the first time, a variant with two flavour-changing capsules (menthol and spearmint) in the filter (Pall Mall Double Capsule),[24] see Figure 7.

Figure 7: Pall Mall double capsule pack, insert and cigarette

BAT provided some retailers with posters highlighting the transition of Pall Mall from fully branded to plain packs and explaining that while Pall Mall cigarettes would still contain a capsule, the symbol on the filter which identified that it was a capsule cigarette was no longer allowed (Figure 8). Although the impact of plain packaging and the TPD on pricing is beyond the scope of this paper, the posters also show that the plain pack contains two more cigarettes, with BAT stating that ‘as the Pall Mall core range transitions to plain pack size, adult tobacco consumers will find their new 20s KS/SK packs to have the same RRP (*recommended retail price*) as the current 18 packs they purchase. That’s 10% more value for the same price’.[25]

Figure 8: Poster in shop explaining transition of Pall Mall capsule cigarettes from fully branded to plain packs

Filter innovation: A range of novel filter designs, other than capsule cigarettes, were introduced between May 2015 and April 2016. This included JPS Triple Flow, a new brand variant introduced in December 2015, which according to Imperial incorporated unique easy draw channels with granular additives in the filter and special paper that created less smoke and less smell and offered the ultimate smooth smoking experience.[26] Aside from this, a firmer filter was introduced for Marlboro Touch in May 2015[27] and tube (recessed) filters for the Pall Mall family (excluding Pall Mall Double Capsule) in April 2016,[24] see Figure 9. The ‘Taste Plus’ filters used for Pall Mall feature a tube segment which, according to BAT, offered ‘a firmer feel in hand and a richer taste experience with advanced filtration’.[25] BAT added that ‘brand equity is more than just about packaging it comprises the quality, taste, blend and smoking experience for the adult tobacco consumer’,[25] clearly attempting to reassure retailers that the tobacco category will remain important.

Figure 9: Cigarette pack inserts explaining the new 'Taste Plus' and 'Triple Flow' filters

DISCUSSION

A number of changes to the pack, brand and product were observed throughout the study period. With respect to packaging, eight pack redesigns and five limited-editions were identified in the year before the phase-in period (May 2015 – April 2016). Limited-edition packaging can help engage consumers with brands, have a lasting impact on brand perceptions, and increase the number and speed of sales.[22,28] While limited-edition packaging for cigarettes and rolling tobacco is common within the UK,[1,29] the introduction of six limited-edition packs between May and July 2016 (none of which we could find in shops until June 2016) shows that tobacco companies had prepared to exploit the phase-in period. Tobacco companies also introduced limited-edition embossed tins during the phase-in period, giving smokers the opportunity to retain these and decant their cigarettes or rolling tobacco into them post-standardised packaging.[30] There is no consistency in the length of the phase-in period for plain packaging in different countries (12 months in the UK, 9 months in France, 2 months in Australia), with our findings suggesting that tobacco companies will use longer phase-in periods to continue to promote their products.

Unlike in Australia, where cigarette packs must be straight-edged, plain packs in the UK are permitted to have bevelled or rounded-edges. This is despite tobacco industry research revealing that bevelled and rounded-edged packs are considered stylish, high-quality, elegant and classy, and more appealing than straight-edged packs.[31] Tobacco companies are not however permitted to have slim packs and, as such, some companies are in non-compliance with Section 8(2)(c)(ii) of the Tobacco and Related Products Regulations 2016[5], which states that the general warning and information message must be at least 20mm wide. Given that the general warning and information message has to be displayed on the sides of cigarette packs, slimmer packs such as Vogue, Silk Cut and Alluvé (manufactured by BAT, JTI and von-Eicken respectively), with a width of 12mm, do not meet these requirements. While the UK Department of Health's 'Tobacco packaging guidance for retailers, manufacturers and distributors of tobacco products' does not specifically mention the size of these additional text warnings,[32] it states that 'slim cigarette packs themselves are not allowed' and refers readers to the relevant regulation. The penalty for non-compliance is a fine, imprisonment, or both.[32]

For tobacco companies, opportunities to increase profit and revenue include pricing, efficiencies in manufacturing, lean operating processes in factories, and also brand rationalisation, which helps to reduce portfolio complexity and therefore cost.[33] Like most other leading tobacco companies, one of the market leaders in the UK, Imperial Brands, have increasingly rationalised their brand offerings, having reduced the number of brands from 250 to 184 and planning to reduce this further to 125.[33] As an example, through brand migrations the John Player Special (JPS) brand family in the UK now has 19 cigarette variants – for comparison, almost all other brands have less than 10 variants. Just as JPS has been successful in Australia following plain packaging,[34] Imperial Brands may have a similar intention for this brand in the UK.

In terms of branding, we found that the use of colour within variant names has become more common on standardised packs, e.g. 'Smooth' has typically become 'Blue' and 'Menthol' is now 'Green'. This was also the case in Australia,[6] where the inclusion of colour within variant name increased by more than 50% from 2011 to 2015.[35] Variant name change has also been used to generate interest in some existing variants (e.g. JPS Black became JPS Legendary Black) and new variants (e.g. Golden Virginia Bright Sunrise) in the UK, with this being one of the few remaining ways that tobacco companies can attempt to draw attention to their products and influence product perceptions.[36] Further research exploring consumer response to brand variant name on plain packs, and particularly in markets with plain packaging, would be of significant value.[37]

The final trend we observed was the introduction of a number of innovative filters. Tobacco industry journals highlight the increasing importance of the filter, which is one of the first things that consumers see when the pack is opened and one of the last means of communication and product differentiation.[38,39] Filter manufacturer Essentra suggests that the growth of the speciality filter segment provides reason for optimism within the tobacco industry.[40] Changes to the packaging are considered the key driver of the increased use of novelty filters, with increasingly large on-pack warnings reducing space for brand messages[38] and plain packaging reported to have heightened interest in novel filters.[41] Continued filter innovation in the UK and markets that implement plain packaging seems inevitable.

While it was our intention to provide some insight into how tobacco companies in the UK responded to legislation that has transformed the appearance of the packaging of cigarettes and rolling tobacco, it is likely that there are pack, brand and product developments that we have missed during our surveillance. For instance, it is noted that tobacco companies hired an independent company to add promotional price stickers to the cellophane post-standardised packaging, a process known as 'stickering'.[42] In addition, we did not examine how tobacco companies have used pricing in response to standardised packaging and the TPD, which merits separate assessment given that most cigarettes came in packs of less than 20 and very few brands of rolling tobacco came in 30 gram packs. Indeed, as of December 2015 most (82%) cigarette packs sold contained less than 20 sticks and most (92%) packs of rolling tobacco contained less than 30g.[24] Research is also needed to explore the longer-term response of tobacco companies to standardised packaging.

In summary, we found that prior to the phase-in period for standardised packaging in the UK, tobacco companies introduced a range of filter innovations, suggesting the growing importance of the filter in such markets.[41] Tobacco companies used the first few months of the phase-in period to introduce limited-edition packs and tins, and innovative inner foil systems, calling into question the longer time period they were granted in the UK than in France or Australia. Post-standardised packaging, variant name modification was common, often involving the inclusion of recognisable strength indicators such as Blue, Red or Green. The role of brand and variant name on otherwise plain packs merits further attention. That there was non-compliance with the legislation highlights the importance of monitoring market developments in countries implementing plain packaging.

What this paper adds

► The UK became the third country to introduce plain (or standardised) packaging, with a much longer phase-in period (12 months) than in Australia (2 months), the first country to introduce this measure.

►Little is known about how tobacco companies respond to plain packaging. We explored changes to the pack, brand and product before, and shortly after, standardised packaging was fully implemented in the UK.

► Tobacco companies introduced limited edition pack designs and re-usable tins, innovative inner foil systems, brand extensions and novel filters before standardised packaging. There was evidence of new pack sizes for some brands, new brand variants, brand and/or variant name changes, and brand migrations, once products came in standardised packs.

► There was non-compliance with the legislation, with slim packs, which are not permitted, on sale after standardised packaging was fully implemented.

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