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Findings for Tobacco Packaging
Study (Theme 4)

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CAVEAT: QUALITATIVE STUDY

This qualitative study is intended to provide insights and directions and not a quantitative, precise assessment. The comments made pertaining to the qualitative phase in this report are based on information gathered from a small sample of participants and may not be representative of the overall population. Conclusions pertaining to the qualitative phase should be viewed as hypotheses requiring further quantitative substantiation. We shall not have any responsibility or liability for any business decision made in reliance on the information contained in this report.

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Executive Summary

This report focused on Theme 4 of the study and covered the evaluation of standardised packaging on other tobacco products, which included cigar, cigarillo, pipe tobacco, ang hoon, and beedies.

Applying the findings from previous themes (i.e. the standardised packaging design with pack colour Pantone 448C, 75% GHWL size, and black text on yellow background side-text warning), mock ups were designed for other tobacco products and tested against respective existing branded packs on the market.

Current smoking behaviour

Cigarettes

Almost all participants smoked cigarettes daily, at about half a pack to one pack a day. While some participants smoked less due to health reasons or to avoid smoking in front of their children, the majority smoked more due to work stress, increase in affluence compared to schooling days, and influence from social circle.

Participants mostly started out smoking cigarettes first, before others introduced them to other tobacco products. Some also felt curious towards other products, and thought that there would be no harm trying since they were already smoking.

Nevertheless, most participants preferred to smoke cigarettes because:

- It is widely available
- It is smoked by many
- It has a wide variety of flavours to cater to different preferences
- Its price range is affordable
- It can be finished relatively quickly (in 3 to 4 minutes)
- It does not require any preparation

Cigar

All participants were aware of cigars, and most had tried it before. Participants were motivated to try due to its premium image. Due to its high cost and the lengthy duration to finish smoking, participants could not afford to smoke cigars frequently.

Participants typically smoked cigars during gatherings with friends, parties, or business meetings. While a rare few purchased cigars in Singapore before, most would only buy them when being overseas or from duty-free shops.

Cigarillo

Awareness of cigarillo was very low and some participants confused it with roll-your-owns or beedies. Cigarillos were notable for having different flavours, such as vanilla or chocolate. It was akin to an upgraded version of cigarette, whereby it tasted like cigar, but was much smaller and took less time to finish smoking.

Female participants may retain the cigarillo tins to be used as cases for cigarettes or jewellery. Cigarillo was typically smoked in a gathering of other cigarillo smokers.

Pipe tobacco

Confusion existed among participants on the differentiation between pipe tobacco and ang hoon. It appears that the layperson definition of 'pipe tobacco' is more related to the use of the 'pipe device' itself, rather than the leaves. They generally can smoke other forms of loose leaves (not necessarily pipe tobacco leaves) with their 'pipe device'. Nevertheless, some noted that ang hoon leaves were not suited to be used in a pipe, due to it being too harsh and not fitting within the pipe.

Participants rarely saw smokers use pipe tobacco as it is difficult to find the pipe, find good quality pipe tobacco, troublesome to prepare the pipe tobacco for smoking, maintain the pipe after cleaning, and carry the pipe around. Instead, participants would mostly smoke pipe tobacco at home.

Perception of a typical pipe tobacco smoker differed across participants; some perceived that only the much older generation would smoke this, while others opined that pipe tobacco was smoked by English gentlemen.

Ang hoon

All participants have tried ang hoon before, and some used it as an alternative to cigarettes when they have a tighter budget since it is cheaper. Despite being cheaper than cigarettes, participants generally would not choose ang hoon over cigarettes because it is troublesome to prepare and it is associated with the stigma that ang hoon smoker has no money.

Some participants were aware of machines to help prepare ang hoon, but the stigma associated with ang hoon kept them from picking up ang hoon. One participant carried around both ang hoon and cigarettes, and smoked pre-rolled ang hoon when he had very little time to finish smoking a stick.

Beedies

Low to moderate awareness was observed for beedies, with awareness mostly from Malay and Indian participants. Beedies carried worse stigma than ang hoon, and beedies smokers may be looked down upon.

Beedies was typically associated with foreign workers from Bangladesh or India. Participants who smoked beedies more regularly usually had co-workers or friends who smoked beedies. Despite the stigma, these participants would still smoke beedies if offered.

While some disliked the taste and smell of beedies, others defended it to be an acquired taste, or that it tasted like weed.

Role of packaging during purchase

Packaging mainly informed participants of new products or flavours that entered the market, as it would look different from existing products.

Testing of plain pack against branded packs

Cigar

For the box packaging, a large group of participants found the standardised packaging to be appealing, as the matte finish and dark colour made it look classier, which suited the image of cigars.

Some felt that the box for the standardised packaging looked harmful because the darker colour meant a stronger taste, while others felt that the colour was associated with poison and disease.

For the single tube packaging, slightly more participants felt that the standardised packaging was less appealing and less likely to smoke, because it looked plain and dull, hence was not appealing. As such, the standardised pack's GHWL also stood out less.

Cigarillo

As none of the participants recognised Neos (the brand of mock up tin A), preference between the two was based on their preference for matte or glossy finish, bright or dark colour, as well as the flavour associated with the smell of the cigarillo inside.

Participants mentioned that selection of cigarillo was usually based on smell, as the shop staffs would also offer them the cigarillo to smell before purchasing. In general, there was a slight preference towards standardised packaging, being more appealing since its matte finish did not make the GHWL stand out.

Pipe tobacco

Standardised packaging for pipe tobacco was rated as the least appealing and least likely to be smoked, as the pack colour had negative appeal, and did not convey any information on the flavour like the other two packs (red and beige).

On the other hand, the Butterfly brand (pack B) was perceived to be of lowest quality, as it was a well-known low/mid-tier quality product. Red packaging by Harvest (Pack A) was associated with stronger taste, and more participants also found it appealing, hence it was regarded to be more harmful to health and harder to quit. The red packaging was also more striking, so the GHWL stood out most.

Ang hoon

For ang hoon, participants relied mostly on the colour-coding system of cigarettes and the brand to deduce the pack that they would like to smoke. Pack A was preferred for its well-known brand Storm King, Pack B (red colour; Muay Thai brand) was preferred by reds flavour smokers, and Pack C (green colour; Strong 75 brand) was preferred by Menthol flavour smokers. Participants could not relate the pack colour of the standardised packaging to existing variants/flavours in the market. The standardised packaging colour was dull and felt unreliable, so participants found it least appealing, least likely to smoke, and had lowest perceived quality.

Pack B's (red colour; Muay Thai brand) GHWL stood out most, as the red colour was striking and associated to danger.

Beedies

The standardised packaging for beedies was least appealing, least likely to smoke, had lowest perceived quality, and most harmful to health. This was because the packaging did not convey any information such as the number of beedies within, unlike the other two packs. The lack of information made participants feel that it may be contraband, and did not feel safe to smoke it.

Comments on GHWL

While participants felt that the GHWL was believable, it did not have any effect on them, as some did not feel it would affect them, while others provided counter-arguments of smokers who were healthy, or non-smokers who got cancer.

Recommendation of standardisation for other tobacco products

Standardised packaging for cigar (single tube), pipe tobacco, ang hoon, and beedies were least appealing, and least likely to smoke, so HPB may consider to launch the standardised packaging for these tobacco product lines.

For the standardised packaging of cigar (box) and cigarillo, HPB may consider changing the matte finish of the packaging to reduce the classier look that the matte finish conveys.

Research Background and Introduction

The usage of tobacco products has always been a widespread concern worldwide. Singapore adopts a multipronged strategy comprising taxation, legislation, public education, collaborative partnerships and provision of smoking cessation services to reduce smoking prevalence in Singapore.

A public consultation on standardised packaging was carried out from 29 December 2015 to 29 March 2016 to seek public views on this measure. In addition, Health Promotion Board (HPB) has commissioned *Consulting Group - Asia Insight* to carry out a research project to gather local evidence on the technical specifications for standardised packaging of tobacco products. Findings from the research study will be used to determine the optimal layout for standardised packaging suited for local settings.

The research study consists of four themes of investigation (FGD) and a Quantitative Survey:

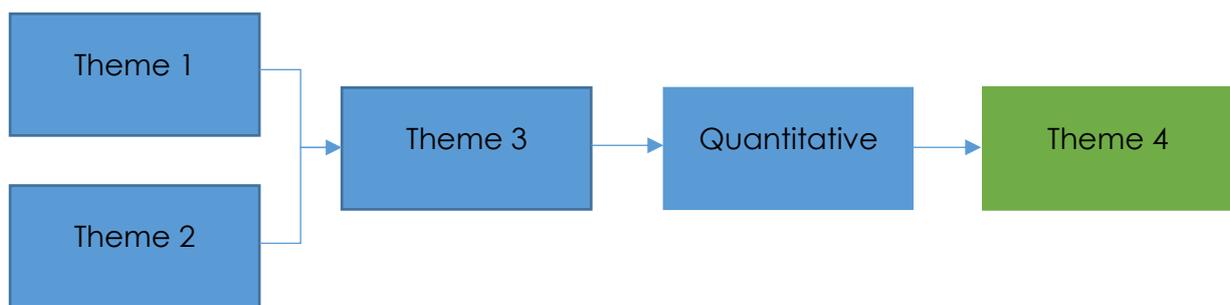


Figure 1: Study Flow

Theme 1: Determining the most effective pack colour, pack type and side text warning label of cigarette packaging to reduce the attractiveness and appeal of the cigarette pack

Theme 2: Identifying the most effective Graphic Health Warning Labels (GHWLs) for cigarette packs

Theme 3: Overall layout of a cigarette pack in the form of a mock-up prototype based on findings in Theme 1 and 2

Quantitative: Validation of shortlisted elements from Theme 3 across Singapore's general population.

Theme 4: Extension to other tobacco products, such as cigar, cigarillo, ang hoon, pipe tobacco and beedies

This report focuses on Theme 4 of the study and will cover the evaluation of standardised packaging on other tobacco products, which includes cigar, cigarillo, pipe tobacco, ang hoon, and beedies.

The objective of Theme 4 is to determine the effectiveness, reception and impact of standardised packaging when applied to other tobacco products, aside from cigarette boxes.

Prototypes for other tobacco products were developed based on findings from the previous themes; the prototypes adopted the Pantone 448C pack colour, had graphic health warnings at 75% of the packaging and had side-text warnings with black text on a yellow background (where applicable). The prototypes were tested against other existing products/packaging across nine focus group discussions (FGDs) with participants from various demographic profiles:

- Smoking status on other tobacco products
- Age
- Gender
- Race
- Social economic status (Household income)

This report will share the findings from the focus group discussions, and present the pros and cons for consideration.

Research Methodology

The standardised packagings were evaluated over nine focus group discussions (FGDs). The duration of each session was two and a half hours.

Detailed breakdown of group profile:

Group	Profile	Number of Participants	Date / Time of FGDs/ IDIs
T4-1	Cigar smokers, aged 30 years and above, Chinese	9	22nd August 2016, 1900 to 2130
T4-2	Cigar smokers, mixed age and race	8	20th August 2016, 1000 to 1230
T4-3	Cigarillo smokers, mixed race and age	8	20th August 2016, 1400 to 1630
T4-4	Pipe tobacco smokers, mixed race and age, male	9	20th August 2016, 1700 to 1930
T4-5	Pipe tobacco smokers, mixed race and age, female	9	19th August 2016, 1900 to 2130
T4-6	Ang hoon smokers, aged 30 years and above, Chinese	9	18th August 2016, 1900 to 2130
T4-7	Ang hoon smokers, mixed race and age	9	17th August 2016, 1900 to 2130
T4-8	Beedies smoker, aged 30 years and above, Malay and Indian	9	16th August 2016, 1900 to 2130
T4-9	Beedies smoker, younger, Indian	10	15th August 2016, 1900 to 2130

All discussions took place in English, covering the research scope as defined in the discussion guide (Appendix A). Participants were also asked to complete worksheets at various stages of the discussion to determine their personal ratings on the standardised and branded packaging of the respective tobacco products. A sample of the worksheets used can be found in Appendix B.

To prevent any bias in the order of exposure to the stimulus, or primacy/ recency effects, the test packs were rotated in the order below:

Pack Labelling

Pack Label	Pack represented				
	Cigars	Cigarillos	Pipe tobacco	Ang Hoon	Beedies
A	Cohiba (Box)	Neos	Harvest	Storm King	Ganesh
B	Montecristo (Box)	Standardised Packaging (SP)	Butterfly	Muay Thai	Seyadu
C	Standardised Packaging (Box)		Standardised Packaging (SP)	Strong 75	Standardised Packaging (SP)
D	Cohiba (Single Tube)			Standardised Packaging (SP)	
E	Standardised Packaging (Single Tube)				

Rotation Information

Rotation Version	Presentation Order				
	Cigars	Cigarillos	Pipe tobacco	Ang Hoon	Beedies
1	A,B,C; D,E	A,B	A,B,C	A,B,C,D	A,B,C
2	B,C,A; E,D		B,C,A	C,D,A,B	B,C,A

Group Number	Respondent Profile	Rotation Version
T4-1	Cigar smokers, ≥ 30 years old, Chinese	1
T4-2	Cigar smokers, mixed race and age	2
T4-3	Cigarillo smokers, mixed race and age	1
T4-4	Pipe tobacco smokers, mixed race and age, male	1
T4-5	Pipe tobacco smokers, mixed race and age, female	2
T4-6	Ang hoon smokers, ≥ 30 years old, Chinese	1
T4-7	Ang hoon smokers, mixed race and age	2
T4-8	Beedies smoker, ≥ 30 years old, Malay and Indian	1
T4-9	Beedies smoker, younger, Indian	2

Notes on Analysis

Please note that all quantitative analysis in this report are based on a small sample size, hence should only be taken as indicative and not conclusive.

Current Smoking Behaviour

Cigarettes

Aside from a handful of participants who preferred to smoke other tobacco products, majority of participants smoked cigarettes every day.

On average, they smoked about half a pack to one pack a day, which they considered to be the normal range for an average smoker. A few mentioned that they were smoking less than half a pack (less than 10 sticks), and they identified themselves to be a more casual smoker, or that they were trying to reduce smoking.

Reasons for wanting to reduce their smoking behaviour were usually because of their children, to avoid smoking or smelling of smoke in front of them, or for personal health reasons.

"It's very difficult for me to smoke sometimes because I have kids, I don't want to smoke in front of them. So I will hide, I get so fed up sometimes. So I only do it during office hours, basically, so I don't bring my cigarettes home, then it's only during weekends, but I try not to smell in front of them. So gradually when you start having such habits, you kind of cut down, and then I go into very light ones nowadays."

- Ang hoon, aged 30-39, female, Chinese

"I understand that as I get older I have to decrease. it's just health lor."

- Cigar, aged 30-39, female, Chinese

"Health reasons la, getting older. (meaning?) Stamina and other stuffs ya. (So you cut down?) Cut down ya."

- Beedies, aged 18-29, male, Indian

However, more commonly, many participants mentioned that they smoked more over time, as they usually started around secondary school, and had financial constraint and restriction from smoking openly then.

"During school days when you are broke...Schooling time got no money so have to share"

- Beedies, aged 18-29, female, Indian

"Last time in school also you cannot openly smoke, so you have to like ration, hide. Now adult already you can smoke anywhere, as and when what."

- Cigarillo, aged 20-29, female, Chinese

"For me is actually increase, I still remember the time when I started smoking, was around 15 or 16 years back. Then after that, Singapore law changed, all soft pack and hard pack, 20 sticks. When it changed to 20 sticks; when you got more cigarette you normally also smoke more, that's why la."

- Pipe tobacco, aged 30-39, male, Chinese

Coupled with increased stress or business necessity from work, most participants smoked more frequently. Over time, their social circle was also surrounded by other smokers, which tended to encourage them to smoke even more.

"Naturally sales type of job ah, attracts smokers."

- Ang hoon, aged 30-39, male, Chinese

"But for me even though I stopped drinking, but still smoke a lot during especially working hours, working time, some stressful vibe then I really smoke a lot."

- Pipe tobacco, aged 30-39, male, Malay

*"I'm always hanging out with my friends, so all of them smoke then they tend to offer me cigarette as well, because they are always there smoking, I'm always there and joining them."
- Pipe tobacco, aged 18-29, female, Malay*

Almost all participants started out smoking with cigarettes first. This was because other smokers tended to offer them cigarettes first, and only offered them the other tobacco products once they know that the participant was a smoker.

*"People always offer cigarettes first."
- Beedies, aged 18-29, female, Indian*

*"Only after we smoke cigarettes then we will know about other stuffs."
- Pipe tobacco, aged 18-29, female, Chinese*

Some participants also mentioned that they asked to try out the other tobacco products when they saw other smokers smoking them, as they were curious about a tobacco product that was different from what they had tried before.

*"He (father-in-law) was smoking beedies at home, so I was telling my husband what did your dad smoke like so strong, then I look at it, it's some little tiny with the dry leaves and wrap with the kind of red threads, you know, he say "You can try la if you want to try"."
- Beedies, aged 30-39, female, Malay*

However, despite their adventurous nature, most participants still smoked cigarettes instead of the other tobacco products because of the following reasons:

- It is widely available
- It is smoked by many
- It has a wide variety of flavours to cater to different preferences
- Its price range is generally affordable and does not give the 'cheap' image
- It can be finished relatively quickly (in 3 to 4 minutes)
- It does not require any preparation

*"Anytime you want to buy cigarette packs, I finish already then just go 7-Eleven just buy."
- Pipe tobacco, aged 18-29, female, Malay*

*"Convenient ah, like he said, you go off for few minutes, time tight faster smoke and go back"
- Pipe tobacco, aged 40-49, male, Chinese*

*"Because you see cigarette you just open the pack then can just smoke already what."
- Ang hoon, aged 30-39, male, Chinese*

Cigar

All participants were aware of cigars, and most had tried them before. Participants tried cigars out of curiosity due to its premium image, as depicted in movies. Some participants likened the idea of smoking a cigar to wine tasting. Participants also mentioned that cigars were usually paired with liquors such as whiskey.

*"Basically like wine tasting like that."
- Pipe tobacco, aged 30-39, male, Chinese*

*"Whiskey and cigar good, it's a very good combination."
- Cigar, aged 30-39, male, Chinese*

However, cigars are very expensive in Singapore, and it would take an hour or more to finish smoking one tube of cigar. As such, most participants only smoked it a few times a month.

"Because the duration to finish cigar is around 2 hours is very long especially, so normally our chill out session then will have a cigar, if not the duration is too long to finish cigar already."
- Cigar, aged 30-39, male, Chinese

Usually, they smoked it at parties or gatherings with friends, where they had more time to relax and slowly smoke the cigar. Even then, participants usually shared one box of cigar with friends as it was too much for one person to finish. Participants also mentioned smoking cigars for celebration, or business meetings.

"Because initially I was exposed to cigars through my boss, because every time we get a big project, then after that we will have a night out, then we will go to boss's place and then he will give us whiskey, uh, together with cigar, so it's like a celebrating mood la."
- Cigar, aged 30-39, male, Chinese

While some had only tried it from friends, others had purchased cigars before, in tubes or boxes. However, cigars were rarely purchased in Singapore. Instead, they usually purchased them overseas or from duty-free shops in airports.

"In the past I used to buy at Takashimaya, they used to have one. Half the time if I'm flying in from elsewhere I also buy from DFS."
- Pipe tobacco, aged 30-39, male, Chinese

Participants shared that the way to smoke cigars differ from cigarettes; cigars are not meant to be inhaled, instead they are supposed to keep the smoke in their mouth and taste it. Choking was a common experience for those who tried it for the first time.

"There's no deep inhale, because it's, you're gonna get cough, you will cough if you inhale it."
- Ang hoon, aged 40-49, female, Chinese

"That's what happened when I inhaled in, I go blank haha."
- Cigar, aged 30-39, male, Chinese

Image of cigar smokers

Participants generally associated cigar smokers with businessmen, Caucasians, people with wealth and status, and mafias. However, it may also be perceived as the person trying to act above his or her own means.

"The wannabe atas."
- Beedies, aged 18-29, male, Indian

"Rich man, ang mohs"
- Beedies, aged 30-39, female, Malay

"More of the middle age to older age, at least middle age and above, won't be youngsters la, and working class."
- Cigar, aged 30-39, female, Chinese

"Usually filthy rich. And some also smoke for style la, like I (want to have) style also mah like brandy ah style also la."
- Cigar, aged 40-49, male, Indian

Brand awareness

Brand awareness was low, even among participants who had purchased cigars before. This was because participants relied on the shop staff for recommendation on

the more popular cigars. Some also felt that the difference between cigar quality was determined by the country it was manufactured at, as opposed to its brand. Nevertheless, a minority of participants were more acquainted with the different brands, such as Cohiba, Davidoff, Monte Cristo, and Vegas 5.

"Last time I used to go to the cigar shops the owners will introduce what, ask you what, like light finish or whatever fragrance, that kind, so you won't know what brand is that, and where it's from."
- Cigarillo, aged 30-39, female, Chinese

"Usually I mean we know Cuba cigar is the good one, good one."
- Ang hoon, aged 30-39, male, Chinese

If staff was not available to provide recommendation, participants relied on the cigar's flavour, smell or packaging. Participants were also restricted by their budget, and usually did not have much choice within their budget range. For those who may be purchasing it as gifts, the packaging played a part in their choice. At duty-free shops, besides packaging, price was also used in determining which cigar to purchase.

"I just choose the midrange price one, the price range"
- Ang hoon, aged 30-39, male, Chinese

"Normally you present it as a gift then during the meeting they will consume it as well."
- Cigar, aged 30-39, male, Chinese

"I think packaging also play an important role, to attract the consumer"
- Ang hoon, aged 30-39, female, Chinese

Cigarillo

Awareness of cigarillo among participants was the lowest among the five tobacco products. Many had not heard of cigarillo before, and some might had confused it with roll-your-owns or beedies, based on the description of the tobacco product.

(On Cigarillo) "The flavours and it's not like smoking paper, it's literally a cigar paper, it just that it comes with a filter"
- Cigar, aged 18-29, female, Malay

"You can add the amount of tobacco la, how thick you want or how lighter you want."
- Cigar, aged 40-49, male, Indian

Cigarillo was notable for having different flavours, such as vanilla, or chocolate. It was described as a hybrid between a cigar and a cigarette, whereby it tastes like a cigar, but at a length and size like a cigarette. It would take about 15 to 20 minutes to finish smoking one stick of cigarillo, and was also more affordable compared to a cigar. As such, it was akin to an upgrade of a cigarette.

"That's the one that usually comes with flavours, got chocolate, vanilla, banana?"
- Pipe tobacco, aged 30-39, female, Indian

Female participants tended to keep the cigarillo tin boxes for other purposes, such as keeping their cigarettes, or keeping jewellery.

"I use as jewellery box after that."
- Cigarillo, aged 30-39, female, Chinese

Like a cigar, cigarillo is not meant to be inhaled. It has also been described to be like wine-tasting, in that you are supposed to let the smoke linger in your mouth for a while. Depending on whether the crowd or friends smoke cigarillo or not, participants will smoke cigarillo in a gathering.

"Like wine like that you have to linger awhile"
- Cigarillo, aged 30-39, female, Chinese

Brand awareness

Only those who were recruited for being cigarillo smokers, and a minority of cigar smokers were aware of cigarillo brands. Some brands mentioned were Davidoff, Good Times, Shorter Sweet, Macanudo and Romeo Y Julieta.

Pipe tobacco

Understanding of pipe tobacco was rudimentary for some participants, especially among the younger participants. Some participants were under the impression that any tobacco smoked with a pipe would be pipe tobacco, while the same tobacco if rolled on your own would be ang hoon. Other participants pointed out that certain tobacco were harsher, and so could not be used with pipe tobacco.

"You can put the Drum in pipe also."
- Beedies, aged 40-49, male, Indian

"Drum, the tobacco is too fine."
- Beedies, aged 40-49, male, Malay

The older participants still knew of or remembered pipe tobacco smokers who were from the older generation. However, most agreed that they seldom see anyone with a pipe anymore. For those who knew of older generation who smoked pipe, their association of pipe tobacco was generally more negative.

"Only ah pek ah, don't have already, I don't see ah pek smoking pipe also"
- Cigar, aged 30-39, female, Chinese

Main barriers to smoking pipe tobacco lie in the difficulty to find a pipe, find pipe tobacco leaves, carrying a pipe around, preparing pipe tobacco for smoking and maintaining the pipe after smoking.

"You have to carry the pipe everywhere you go, then very 'ma fan' (troublesome), then you must throw away the ash then must clean it, very 'ma fan' (troublesome)."
- Pipe tobacco, aged 18-29, female, Chinese

(On pipe making noise) "Noisy because probably the tobacco inside is not packed properly."
- Cigarillo, aged 40-49, male, Chinese

However, one participant who regularly smoked pipe tobacco mentioned that smoking pipe tobacco required careful maintenance of the pipe, such that it would absorb the tobacco oil or essence after multiple use, and make subsequent smoking experience better. The participant also mentioned that it helped him smoke less since it was inconvenient for him to bring the pipe around with him, and most would not do that.

"I mean to maintain a pipe, the pipe is yours to have. You have to, you nurture the pipe, long period of time they have the kind of pipe oil, the tobacco oil, that's when, when you mixture with it there's a different feeling."

- Pipe tobacco, aged 50-59, male, Chinese

Image of pipe tobacco smokers

Two images of pipe tobacco smokers were described, one being the older generation of uncles, and another being English gentlemen, much like what was depicted by the cartoon "Popeye". Regardless, both images sided towards pipe tobacco smokers being older males.

"I think is more of the great grand pa, is not the grand pa already."

- Cigar, aged 30-39, female, Chinese

"It's very English thing la... I will say for gentlemen, 'cause it looks very classy. You also need to have knowledge about the leaves also, like what leaves is it."

- Cigarillo, aged 30-39, female, Indian

"Because I join this group, the Harley Davidson, sometimes the Harley Davidson riders (smoke pipe)"

- Cigar, aged 30-39, male, Chinese

Brand awareness

Given some confusion in terms of what was classified as pipe tobacco, participants often could not fully agree on whether a particular brand produced pipe tobacco. However, some brands mentioned were Marlboro, Drum, Storm King, Butterfly, Vinelli, and Captain Black.

Ang hoon

All participants have tried ang hoon before, and some smoked it more regularly than others, having it as a form of backup tobacco product in case they were on a tight budget to buy cigarettes.

"Ang hoon will last you until next month start, or until the next month starts when you get your pay then you can buy your cigarettes already."

- Beedies, aged 18-29, male, Indian

As ang hoon requires preparation to roll the tobacco leaves within a paper before it may be smoked, participants would usually smoke ang hoon at home, and when they have the time to prepare it.

Participants generally found ang hoon more troublesome to smoke due to the need for preparation. Some participants, usually females, also mentioned that you would need to lick the paper when preparing ang hoon, and they considered it unglamorous to do so.

"It's not worth the effort, I still have to pack it, I still have to see how much is the amount, roll it in a way to smoke."

- Cigar, aged 30-39, male, Chinese

"It takes time for you to roll, especially when you are rushing. When you are rushing, it's very hard for you to roll."

- Pipe tobacco, aged 30-39, male, Malay

"Not glam, very unglam, like their reason you have to buy the paper you have to buy the leaves, ya, must stick together."

- Ang hoon, aged 30-39, female, Chinese

Some also mentioned that ang hoon had no filter, and that it was too strong for them as they usually smoked Menthol flavour, which was lighter. However, a few participants were aware of a device that could help prepare ang hoon, and separate filters were sold as well for ang hoon.

"My dad has this special machine where he can make ang hoon into like normal cigarette."

- Ang hoon, aged 30-39, female, Chinese

Another barrier to smoking ang hoon was the social stigma associated with ang hoon; it was associated with 'the low class' and 'the poor'.

One participant, who was a heavy smoker and smoked both ang hoon and cigarette regularly, carried both around all the time. He explained that ang hoon could provide him the necessary satisfaction even faster than cigarette, as it was stronger and could be smoked faster. Another participant mentioned that he smoked ang hoon to exert self-control, limiting how many he could smoke since it would take time to prepare.

"I'm rolling my own, in a way, it's deterring me and stopping me from accessing too much, so more or less I can take control with how much I have per day, if not with a pack 20s, I can easily finish the whole box."

- Pipe tobacco, aged 40-49, male, Chinese

Image of ang hoon smokers

Ang hoon was perceived as the cheaper alternative to cigarette, which they smoked when they had no money towards the end of the month, during their younger days as students, or during National Service.

Furthermore, participants mentioned that there was racial segregation for the tobacco product smoked, whereby ang hoon was smoked by Chinese, "rokok gulung" was smoked by Malays, and beedies was smoked by Indians.

Brand awareness

Similar to pipe tobacco, the brands that participants were aware of for ang hoon included Storm King, Butterfly, Muay Thai, and Drum.

Beedies

Despite also being a cheaper alternative to cigarette that was available at convenience stores or mama shops, beedies carried the worst social stigma among all the other tobacco products. Participants shared that if they were found to be smoking beedies, it could result in social exclusion and a drop in social status.

"If he finds out I'm smoking beedies, he will look down on me ah. It's the name beedies, yea it's a stigma."

- Beedies, aged 40-49, male, Indian

Beedis was not widely known and it was more commonly known by Malay and Indian participants. They were usually able to describe beedies as rolled leaves with a string tied around.

While some participants had tried beedies before, few had actually purchased it. Usually, they tried smoking beedis from their co-workers or friends. Despite the stigma associated with beedies, some were still willing to smoke it if offered to smoke in the company of other beedies smokers.

"My workers all Indians, every time lunch time, "ah bang" (gesture offering beedies)."
- Beedies, aged 40-49, male, Malay

However, some participants had only tried beedies once, and were averse to the strong taste and smell that lingered long after they smoked it. On the other hand, some other participants defended beedies and said that it was an acquired taste, for those who truly appreciate tobacco, as it does not contain other chemicals like cigarettes do. A few participants also mentioned that beedies tasted like weed.

"Smell lasts very long."
- Beedies, aged 18-29, female, Indian

"Those they really appreciate beedies, appreciate tobacco, then will appreciate beedies."
- Beedies, aged 40-49, male, Malay

Image of beedies smokers

When asked to describe a typical beedies smoker, participants mentioned that they were usually foreign workers from Bangladesh and India. As it was cheap, participants used to purchase beedies instead of cigarettes when they were schooling, to get more sticks to smoke for the same amount of money.

"Back then we can buy a pack of 10 for 70 cents, but sometimes, get 70 cents right, to share several sticks, not enough, ah no enough money. You see. So get a pack of beedies sticks at 30 cents."
- Beedies, aged 40-49, male, Malay

Brand awareness

Most participants were not able to recall any specific brands for beedies, and remarked that beedies typically had no brand. However, most participants who knew of beedies were able to recognise Ganesh, mainly due to its pink colour packaging.

Other products mentioned

Besides the tobacco products mentioned, participants, usually younger ones, had also tried shisha and vape (e-cigarette) before. Young participants mentioned vape as the trendy thing now among youngsters, despite it being banned in Singapore.

"Nowadays I'm into vaping... It's like all my friends are trying it."
- Cigarillo, aged 18-29, male, Chinese

Role of packaging during purchase

While discussing their brand choice and selection, participants remarked that packaging played the role to inform them of new products that came out in the market, which they might then try. This was made known to them through a new packaging that they had not seen before, thus catching their attention.

"Like you see got different size, then you see got different colour, like you think eh not bad then you want to try."

- Pipe tobacco, aged 18-29, female, Chinese

One participant also noted that she switched the brand of cigarettes she was smoking because she spotted another packaging that looked more attractive and presentable.

"I used to take Marlboro menthol, this other one which was very smooth. Then I see (a new packaging, Virginia Slim) like, wah cool, then I try. It looks nice la, basically. And because I'm not a heavy smoker, basically then it's more like socialising, so I also want to look good in a way, so that's why I change to that."

- Ang hoon, aged 30-39, female, Chinese

Testing of Plain Pack against Branded Packs

Participants were shown a few packs, including the standardised packaging of each tobacco product tested. Participants were first shown the test packs one by one, and asked to rate them based on the packaging on the following attributes:

- Appeal
- Likelihood to smoke
- Perceived quality
- Ease of quitting
- Perceived harm to health
- GHWL stand out

They were then asked to rank the packs on the above attributes as well.

Cigar

Box packaging

Table 1 below presents the percentage of participants who disagreed or strongly disagreed that the box was appealing, contained cigars that they were likely to smoke, had high quality cigars, contained cigars that were easy to quit, and agreed or strongly agreed that the box looked harmful to health, and the GHWL stood out.

The highest percentage is highlighted with dark orange, while the second highest is highlighted with light orange.

Table 1: Attribute rating for cigar boxes

Rating - Bottom 2 box %	A 	B 	C 
Least appealing	59%	76%	47%
Least likely to smoke	53%	65%	29%
Lowest quality	47%	71%	47%
Most difficult to quit	53%	47%	71%
Most harmful to health	76%	82%	76%
Label stands out the most	71%	71%	76%

Table 2 below presents the percentage of participants who ranked the box lowest in appeal, likelihood to smoke, quality, and ease of quitting, and highest in perceived harm to health, and GHWL standing out the most.

Table 2: Attribute ranking for cigar boxes

Ranking - Ranked lowest (%)	A	B	C
			
Least appealing	47%	24%	29%
Least likely to smoke	41%	29%	29%
Lowest quality	41%	29%	29%
Most difficult to quit	29%	41%	29%
Most harmful to health	29%	18%	53%
Label stands out the most	53%	24%	24%

Overall, box A was considered by most to be the least appealing, least likely to smoke, and lowest quality, as well as having a GHWL that stood out the most. Participants mentioned that the checkered pattern on box A looked too messy and less professional in fitting to a cigar's image. Some participants also disliked the colour of the box. However, one participant noted that box A's interior was made of wood, so it made it more appealing.

*"Checker spoilt it la, and the yellow is a little bit dirty."
- Cigar, aged 30-39, male, Chinese*

*"When I open it up I can see its made of wood, rather than the rest of the ones."
- Cigar, aged 30-39, female, Chinese*

While box A was the least appealing, more participants found box B to be not appealing, as the box's colour was plain and dull. Some participants also felt that the box and the GHWL seemed to come as a set, giving the perception that the box and the brand was seemingly promoting the GHWL image and message.

*"Maybe boring, just feel that the money doesn't worth the box."
- Cigar, aged 18-29, female, Malay*

*"If there's one reason I also don't like it is because of the colour combination, it looks like the cigar is promoting oral cancer more than anything."
- Cigar, aged 18-29, female, Malay*

Overall, box C was considered appealing, as the matte design and box colour gave the feeling of a classier look, which fitted the image of cigars.

*"The colour and the texture of the box, not glossy, is matte. More classy."
- Cigar, aged 30-39, male, Chinese*

*"I think because very sleek leh, I feel very sleek kind of feel it's like a Marlboro black, because I like black la so personal preference."
- Cigar, aged 18-29, male, Chinese*

It was perceived to be most harmful to health mainly because of the colour of the box. Some participants felt that box C looked harmful because the box colour was associated with stronger tobacco content, and hence more harmful. On the other hand, a few participants felt that the colour was associated with poison and disease, and it also brought out the image more.

"It looks the strongest taste, it looks most harmful to health."
 - Cigar, aged 30-39, male, Chinese

"Black, because black bloody harmful, just like the lung also black already."
 - Cigar, aged 18-29, male, Chinese

Tube packaging

Participants were also shown another set of test packs, for the stick/ tube packaging of cigars. Table 3 below presents the percentage of participants who disagreed or strongly disagreed that the tube was appealing, contained cigars that they were likely to smoke, had high quality cigars, contained cigars that were easy to quit, and agreed or strongly agreed that the tube looked harmful to health, and the GHWL stood out.

The higher percentage is highlighted with dark orange.

Table 3: Attribute rating for cigar tubes

Rating - Bottom 2 box %	D	E
		
Least appealing	41%	47%
Least likely to smoke	35%	41%
Lowest quality	41%	59%
Most difficult to quit	41%	41%
Most harmful to health	41%	41%
Label stands out the most	53%	47%

Table 4 below presents the percentage of participants who chose the tube lower in appeal, likelihood to smoke, quality, and ease of quitting, and higher in perceived harm to health, and GHWL standing out more.

Table 4: Attribute ranking for cigar tubes

Ranking - Ranked lowest (%)	D	E
		
Least appealing	41%	59%
Least likely to smoke	47%	53%
Lowest quality	47%	53%
Most difficult to quit	47%	53%
Most harmful to health	41%	59%
Label stands out the most	76%	24%

When presented in a tube packaging, selection between the 2 tubes were based on mainly two factors: matte or glossy, and brighter or darker colour. Based on their personal preference for the above two factors, participants chose whichever tube that fitted their preference. From their preference, they then chose the tube that they would smoke, with higher quality, more difficult to quit, and more harmful to health.

*"The quality, glossy the quality is better."
- Cigar, aged 30-39, female, Chinese*

*(On tube E) "This one looks like those cream ah, maybe like anti-mosquito cream."
- Cigar, aged 30-39, female, Chinese*

*"If it's appealing to me I would purchase, then I think should be good quality."
- Cigar, aged 40-49, female, Chinese*

Tube D's GHWL stood out more, because the pack was more colourful and brighter, with the glossy finish reflecting light to catch attention.

*"This one is black and yellow, then we turn over is black, so stands out more, compared to the other one black through out."
- Cigar, aged 30-39, male, Chinese*

*"Because it's glossy also, it attracts the attention to look at the whole packaging in general."
- Cigar, aged 30-39, male, Chinese*

Cigarillo

Table 5 below presents the percentage of participants who disagreed or strongly disagreed that the tin was appealing, contained cigarillo that they were likely to smoke, had high quality cigarillo, contained cigarillo that were easy to quit, and agreed or strongly agreed that the tin looked harmful to health, and the GHWL stood out.

The higher percentage is highlighted with dark orange.

Table 5: Attribute rating for cigarillo tins

Rating - Bottom 2 box %	A	B
		
Least appealing	38%	13%
Least likely to smoke	13%	0%
Lowest quality	50%	13%
Most difficult to quit	38%	50%
Most harmful to health	25%	13%
Label stands out the most	38%	25%

Table 6 below presents the percentage of participants who chose the tin lower in appeal, likelihood to smoke, quality, and ease of quitting, and higher in perceived harm to health, and GHWL standing out more.

Table 6: Attribute ranking for cigarillo tins

Ranking - Ranked lowest (%)	A	B
		
Least appealing	63%	38%
Least likely to smoke	63%	38%
Lowest quality	50%	50%
Most difficult to quit	50%	50%
Most harmful to health	50%	50%
Label stands out the most	88%	13%

Between the two tins, as tin A's brand (Neos) was not one that participants were aware of, the deciding factors were mainly on their preference for glossy or matte design, and darker or brighter colour. In the end, as tin A's GHWL stood out more due to the glossy, reflective and brighter sticker, it shifted the preference away from tin A slightly.

*"The in thing is matte, no more shiny mah, shiny very cheena already."
- Cigarillo, aged 40-49, male, Chinese*

*"Because it, the picture is not so prominent, because it's not so glossy out there, I'm not gonna like get affected by it."
- Cigarillo, aged 40-49, female, Chinese*

Nevertheless, participants mentioned that the basic content of a cigarillo between different products and tins were the same, and the difference was in its taste and flavour. As such, the appeal and design of the tin only helped them decide which to try first, but ultimately they would stick with the one with their preferred taste.

*"Taste, we didn't taste it what, you are saying based on appearance mah."
- Cigarillo, aged 18-29, female, Chinese*

On a related note, participants mentioned that specialty shops would allow them to smell the cigarillo before purchase, and so some participants also based their preference on the smell of the actual cigarillo contained within the tins. On the other hand, without any colour coding system, the tin's packaging did not convey any information to participants regarding the cigarillo, hence there was no conclusion on the quality.

*"I check by the smell then the chocolate smell is actually very attractive."
- Cigarillo, aged 30-39, female, Chinese*

*"Must taste, quality you need to taste."
- Cigarillo, aged 40-49, male, Chinese*

*"The colour coding is different, for this, there is no such thing as colour coding."
- Cigarillo, aged 30-39, female, Indian*

Pipe tobacco

Table 7 below presents the percentage of participants who disagreed or strongly disagreed that the pack was appealing, contained pipe tobacco that they were likely to smoke, had high quality pipe tobacco, contained pipe tobacco that were easy to quit, and agreed or strongly agreed that the pack looked harmful to health, and the GHWL stood out.

The highest percentage is highlighted with dark orange, while the second highest is highlighted with light orange.

Table 7: Attribute rating for pipe tobacco packs

Rating - Bottom 2 box %	A	B	C
Least appealing	39%	56%	44%
Least likely to smoke	39%	33%	50%
Lowest quality	50%	61%	50%
Most difficult to quit	56%	56%	50%
Most harmful to health	61%	44%	56%
Label stands out the most	33%	44%	44%

Table 8 below presents the percentage of participants who ranked the pack lowest in appeal, likelihood to smoke, quality, and ease of quitting, and highest in perceived harm to health, and GHWL standing out the most.

Table 8: Attribute ranking for pipe tobacco packs

Ranking - Ranked lowest (%)	A	B	C
Least appealing	22%	33%	44%
Least likely to smoke	22%	33%	44%
Lowest quality	11%	56%	33%
Most difficult to quit	61%	6%	33%
Most harmful to health	50%	17%	33%
Label stands out the most	67%	11%	22%

As pack A's brand was well-designed and pack B's brand was well recognised, participants were inevitably influenced by pack C's lack of a clear brand indication to perceive it as least appealing and least likely to smoke. This was coupled with the pack C's colour being less appealing and having negative association, so more participants considered pack C as least appealing and least likely to smoke.

"The brown doesn't tell you what flavour is it, and I don't think there's chocolate, it's not too appealing."

- Pipe tobacco, aged 40-49, male, Chinese

"Just 'lao sai' like that."

- Pipe tobacco, aged 18-29, female, Chinese

Between pack A and B, participants decided which they were more likely to smoke based on the pack's appeal to them, their preference for stronger or lighter flavour, as well as their familiarity with the brand. Flavour of pack A and B was deduced based on the pack colour, whereby red (Pack A) meant reds, while white (Pack B) meant light.

"Striking you choose the most colourful one, if all 3 I never try before I choose the most colourful one."

- Pipe tobacco, aged 18-29, male, Chinese

"Familiar with the brand if you talk about perception right, if you see the brand, the colour, it influenced you to a certain extent I guess."

- Pipe tobacco, aged 30-39, male, Chinese

"I don't like red cigarettes, like you know reds, so I see red packaging, I just very..."

- Pipe tobacco, aged 18-29, female, Chinese

Most participants agreed that pack A was the highest quality of the three, due to the pack having a more appealing colour and brand design with cherry logo, especially for females. As a result of the highest perceived quality, pack A was then perceived to be most harmful to health as the tobacco content was the highest.

"Once I find it appealing I just buy it ah."

- Pipe tobacco, aged 18-29, male, Chinese

"For me the word harvest, makes me feel like you know, very carefully harvested."

- Pipe tobacco, aged 30-39, female, Indian

Meanwhile, pack B (Butterfly) was a known low/mid-tier quality brand, so it did not fare well in terms of perceived quality.

"Then we know how cheap it (pack B) is when we were poor."

- Pipe tobacco, aged 18-29, female, Chinese

Ang hoon

Table 9 below presents the percentage of participants who disagreed or strongly disagreed that the pack was appealing, contained ang hoon that they were likely to smoke, had high quality ang hoon, contained ang hoon that were easy to quit, and agreed or strongly agreed that the pack looked harmful to health, and the GHWL stood out.

The highest percentage is highlighted with dark orange, while the second highest is highlighted with light orange.

Table 9: Attribute rating for ang hoon packs

Rating - Bottom 2 box %	A	B	C	D
Least appealing	50%	28%	50%	50%
Least likely to smoke	33%	44%	39%	44%
Lowest quality	44%	39%	33%	44%
Most difficult to quit	56%	50%	44%	33%
Most harmful to health	83%	72%	89%	94%
Label stands out the most	78%	83%	72%	89%

Table 10 below presents the percentage of participants who ranked the pack lowest in appeal, likelihood to smoke, quality, and ease of quitting, and highest in perceived harm to health, and GHWL standing out the most.

Table 10: Attribute ranking for ang hoon packs

Ranking - Ranked lowest (%)	A	B	C	D
Least appealing	22%	17%	0%	61%
Least likely to smoke	17%	28%	11%	44%
Lowest quality	22%	22%	0%	56%
Most difficult to quit	33%	17%	22%	28%
Most harmful to health	11%	44%	11%	33%
Label stands out the most	33%	61%	6%	0%

Pack D was considered the least appealing pack, least likely to smoke, lowest quality, and also being the second most difficult to quit, and second most harmful to health. This was because of the colour of the pack looking dull and less reliable, and the combination with the picture made it worse.

*(Referring to pack D) "Like from what country, maybe from MIC (made in China), not reliable to me."
- Ang hoon, aged 30-39, female, Chinese*

*"It looks black, coupled with the picture looks worse, the colour and the picture combine it looks really bad ah."
- Ang hoon, aged 30-39, male, Chinese*

However, the GHWL on Pack D did not stand out, as participants mentioned the dark colour blended with the dark tone of the GHWL image. On the other hand, Pack B was most harmful, and the GHWL label stood out the most because the red colour was associated with danger.

*"Red is for danger."
- Ang hoon, aged 30-39, female, Chinese*

*"Colour red used for, danger, warning sign."
- Ang hoon, aged 40-49, female, Chinese*

Between pack A, B, and C, participants' judgment on appeal, likelihood to smoke and quality were based on the brand, the pack colour, and their own flavour preference. Pack B was preferred by participants who smoked Reds flavour cigarettes, while pack C was preferred by participants who smoked Menthol flavour cigarettes, due to the ingrained colour coding system established for cigarettes and ang hoon as well.

*"For myself, green is for menthol right, I smoke menthol, so the more menthol the better."
- Ang hoon, aged 40-49, male, Chinese*

*"this colour won't affect the ang hoon smoker, this is just a code to whether menthol or not menthol."
- Ang hoon, aged 40-49, female, Chinese*

For pack A, as the brand Storm King was well known and many had tried it before, they were able to decide whether or not they preferred it based on the taste.

Beedies

Table 11 below presents the percentage of participants who disagreed or strongly disagreed that the pack was appealing, contained beedies that they were likely to smoke, had high quality beedies, contained beedies that were easy to quit, and agreed or strongly agreed that the pack looked harmful to health, and the GHWL stood out.

The highest percentage is highlighted with dark orange, while the second highest is highlighted with light orange.

Table 11: Attribute rating for beedies packs

Rating - Bottom 2 box %	A 	B 	C 
Least appealing	42%	63%	53%
Least likely to smoke	32%	47%	53%
Lowest quality	42%	79%	47%
Most difficult to quit	37%	37%	26%
Most harmful to health	26%	53%	37%
Label stands out the most	37%	37%	32%

Table 12 below presents the percentage of participants who ranked the pack lowest in appeal, likelihood to smoke, quality, and ease of quitting, and highest in perceived harm to health, and GHWL standing out the most.

Table 12: Attribute ranking for beedies packs

Ranking - Ranked lowest (%)	A 	B 	C 
Least appealing	5%	32%	63%
Least likely to smoke	16%	26%	58%
Lowest quality	16%	42%	42%
Most difficult to quit	53%	16%	32%
Most harmful to health	11%	16%	74%
Label stands out the most	47%	21%	32%

Between the three packs, pack C was least appealing and least likely to smoke because the lack of information on the packaging made it difficult for them to determine the quality of the beedies contained within.

"Over here it says export quality (Pack B) the guys, the makers in India has made an effort to tell us this is for overseas market, at least my information is there. And there how many inside. So there's more information here. This (Pack C)... information...?"

- Beedies, aged 40-49, male, Indian

"(Pack C) Looks like contraband."

- Beedies, aged 18-29, male, Indian

In comparison, pack A and pack B included clear indication that the packs contained 25 sticks of beedies. For pack B, the packaging also listed that it was for export use, which swayed some participants into considering smoking it, as the manufacturer had likely put in more effort to ensure better quality for the export products. Despite that, pack B's overly decorated packaging, with a man's picture at the side, made the product look cheap so it ranked second in likelihood to smoke, and also lowest quality.

"Because of some wordings, it just doesn't attract me, kind of like it won't be good, one thing is the guy photo, the other is the wording from Bangladesh, so the quality also feel like that, so the thing also from Bangladesh."

- Beedies, aged 18-29, female, Indian

"Looks like what Bangla workers will smoke, its meant for them."

- Beedies, aged 18-29, female, Indian

Pack C was considered most harmful to health because the packaging did not convey any information, and combined with the dark colour tone, it made the GHWL message more obvious to participants, hence most felt that it was most harmful.

"I will say the colour not appealing, the colour is related to danger and disgust, versus pink, pink is more."

- Beedies, aged 18-29, male, Indian

"The warning logo for C looks bigger than the rest."

- Beedies, aged 18-29, male, Indian

Due to the GHWL message taking up most of the packaging, participants had a hard time deciding which GHWL stood out the most. In the end, slightly more participants felt that pack A's GHWL message stood out better due to the brighter packaging. However, as all participants recognised the brand, it was also the most likely to smoke, which participants then argued made it most difficult to quit as they would want to smoke it.

"Good quality, nice, the kick is there."

- Beedies, aged 40-49, male, Malay

Comments on GHWL

Despite being a new image, participants did not show disgust towards it or remarked that it was different from what they were used to. While the GHWL image and message were considered to be believable, participants mentioned that they had grown immune to the GHWL and were not affected by it beyond a dislike to look at it.

*"When I smoke I will avoid looking at all these disgusting pictures."
- Cigar, aged 30-39, female, Chinese*

*"If I have a pen or marker I will usually deface the picture, I will deface that sign, so you have the foetus right, I will draw it to turn it into a turnip, yea because it's just not nice to look at."
- Cigar, aged 18-29, female, Malay*

*"Don't pay attention."
- Ang hoon, aged 40-49, female, Chinese*

Participants felt that the GHWL might have effect only on new smokers, but for them, the decision to smoke, reduce smoking or quit smoking was entirely on themselves, and not influenced by such external factors.

When questioned regarding their intention to quit smoking, participants were quick to defend their smoking habits, and often cited examples of smokers who had lived until old age without any health issue, smokers who developed health issues after they decided to stop smoking, or non-smokers getting cancer as well. This led them to feel that the message sent by the GHWL was skewed and not objective.

*"I think it's quite a biased statement to me but even non-smokers get cancer as well, to me it's fate lor, so it doesn't really matter."
- Beedies, aged 18-29, female, Indian*

*"But we believe it's true of course, but we don't quite believe it will affect us."
- Beedies, aged 18-29, male, Indian*

Impact of Standardised Packaging of Tobacco Products

Some participants were aware of the implementation of standardised packaging in Australia, however none felt that the standardisation of tobacco products would have any impact on them whatsoever. At most, it may create some confusion and require some adjustment to react to the change in the way they purchase cigarette and the way shops sell cigarette, but it would only act as a temporary inconvenience rather than any real hindrance.

*"I think it's just an adjustment period, prevent new smokers, sure got Facebook one post come out, this one is what name, what name, confirm one."
- Pipe tobacco, aged 18-29, female, Chinese*

*"Point to her (shop staff) la I guess, it's harder ah, but won't stop us what."
- Beedies, aged 18-29, male, Indian*

Based on their own experience, participants mentioned that the standardised packaging would make it difficult for the shop staff selling the cigarettes, who may not know much about cigarette packs, to give them the correct brand and variant. Regardless, they felt this was a problem for the shop staff to sort out, and it was not their concern. On their part, participants would mention the brand and variant that they would like to buy, and some may check that the shop staff gave them the correct pack.

*"Auntie I want sampoerna, I want, lights, I want menthol, I want reds, I want hot."
- Cigarillo, aged 30-39, female, Chinese*

As mentioned earlier, packaging helped participants identify new products in the market, so standardisation of the packaging would also make it harder for new brands and products to enter the market.

*"If you are doing a survey for smaller companies who are gonna penetrate here and they are not going to have the packaging and all that, the thing is that they're gonna die, because people will go for the brands."
- Pipe tobacco, aged 30-39, male, Chinese*

Conclusion and recommendations

Table 13 below summarises the ranking of the standardised packaging for each respective test set. A higher ranking means that, compared to the branded packs, the standardised pack was less appealing, less likely to be smoked, lower quality, more difficult to quit, more harmful to health, and GHWL stood out more.

The top rank is highlighted with dark orange, while the second rank is highlighted with light orange.

Table 13: Attribute ranking summary for standardised packaging

Ranking	Cigar (Box) 	Cigar (Tube) 	Cigarillo 	Pipe tobacco 	Ang hoon 	Beedies 
Number of packs tested	3	2	2	3	4	3
Least appealing	2 nd	1 st	2 nd	1 st	1 st	1 st
Least likely to smoke	2 nd	1 st	2 nd	1 st	1 st	1 st
Lowest quality	2 nd	1 st	2 nd	2 nd	1 st	1 st
Most difficult to quit	2 nd	Same*	1 st	2 nd	2 nd	2 nd
Most harmful to health	1 st	Same*	2 nd	2 nd	2 nd	1 st
Label stands out the most	2 nd	2 nd	2 nd	2 nd	4 th	2 nd

*No difference in ranking between the standardised packaging and branded pack.

The standardised packaging for cigar (tube), pipe tobacco, ang hoon, and beedies were the least appealing and also least likely to be smoked, compared to other branded packs. For cigar (box) and cigarillo, the standardised packaging was perceived to be appealing by a large group of participants, especially for cigarillo, where the other branded pack was not recognised, hence it did not have the brand effect to improve its appeal.

Across all standardised packaging, the GHWL stood out less, as participants felt that the pack colour was dull and did not attract their attention. Nevertheless, some participants mentioned that the dull pack colour made it easier to focus on the GHWL as it distracted them less.

Overall, standardised packagings were able to discourage participants from smoking the pack more than branded packs. For cigar (box) and cigarillo, HPB may consider adjusting the packaging matte finish to reduce the classier look that the matte finish conveys. Taking learning from participants, HPB may also consider having a red colour border around the GHWL to make it stand out more.

Appendix

Appendix A – Discussion Guide

STUDY ON PERCEPTION TOWARDS TOBACCO PACKAGING (THEME 4)

DISCUSSION GUIDE

13th August to 22nd August 2016

Note: This discussion guide is intended as a “checklist” for the moderator. Our moderator will be driven by the research objectives and is not likely to follow the script strictly. Participants’ responses may often lead the discussion in new directions or change the order of the topics.

1. Introduction & Warmup

10 MIN/ 10 MIN

Thank respondents for taking time to participate in focus group discussion.

Explain FGD procedures:

- Discussion will take up to 2.5 hours.
- The information collected would be reported collectively without identifying any individual. These collective results may be shared with other government agencies for planning and/ or educational purposes.
- Please note that this discussion is not meant to test your knowledge therefore there is no right or wrong answer as we may have different opinions and thoughts on the topic of discussion.
- We will be doing Audio recording for note-taking purpose. Do be assured that these recordings will only be used for research purpose only.
- Reminder to switch phone to silent mode. If there are any urgent calls that you must take, please let me know and step outside.

Introduce research objectives:

In today’s focus group, we will talk about tobacco packaging. However, before we begin, can you tell me some information about yourself?

- Name
- Marital status
- Family composition (married with/ without kids, age of kids)
- Occupation

- To understand their smoking habit, purchase behaviour and motivation for smoking other tobacco products

Now, I would like to understand more about your smoking habit of tobacco products.

- How many of you here smoke cigarettes? How often and how many sticks a week?
- What other tobacco products do you smoke? [**Probe on cigars, cigarillo, ang hoon, pipe tobacco and beedies**]
- How often do you smoke these products?
- How long have you been smoking these products?
- Why do you smoke these products? How did you get started? What attracted you to it? [**Note if packaging played a part in influencing purchase/ use behaviour and how**] What is it that you like about the product you smoke over the other tobacco products?
- When purchasing other tobacco products, what do you consider? [**Probe: packaging**]
- Does your smoking behaviour change over time?
- How is smoking these products different from smoking cigarettes (for those who mentioned smoking cigarettes above)? [**Probe on: do you inhale the same way you inhale cigarettes?**]
- Where do you normally smoke these products? [**Probe on: at home, at the bars, in lounges?**]
- When do you normally smoke these products? [**Probe: kill time, socialise, boredom**]
- Where did you purchase these products from? [**Probe on online or at stores? Tobacconist / cigar importers / lounge / convenience store?**]
- [**For cigars**] Do you purchase in boxes or sticks? Probe reason for purchasing in box or sticks (e.g. sticks to try different flavours etc).
- How much of these products do you purchase each time?
- Who do you usually smoke these products with?
- What brands do you smoke? [**RECORD ON BOARD**]
- Do you stick to the same brand or change? How do you decide which brand to go for? [**PROBE ON BRANDING ON PACKAGING**]
- What are other brands that you know of? [**RECORD ON BOARD**]
- In your opinion, who smoke these brands? Can you describe their typical profile? Where will people smoke this? With who? [**ASK FOR EACH BRAND**]
- [**FOR CIGARS**] What is the purpose of the brand? Does the brand of cigar matter to you?
- How are these products packed? [**Probe: box / tube / plastic wrap / bag / or not packed at all and just handed to you?**] Do you have the product with you right now? Can you show it to us? [**Moderator to clarify: we are referring to packaging at the point of purchase and not point of usage**]
- Are there casings for other tobacco products? Do you use them? Do you have one with you that you can show us?

3. Testing of plain pack VS branded packs**60 MIN/ 90 MIN**

- To gather perception of tobacco products based on packaging

For the rest of the discussion we will be focusing on **[PRODUCT THAT THE GROUP IS RECRUITED FOR]**

[SHOW PROTOTYPES ON BOARD:]

Moderator to rotate order between different profile groups

Rotation Version	Presentation Order				
	Cigars	Cigarillos	Pipe tobacco	Ang Hoon	Beedies
1	A,B,C; D,E	A,B	A,B,C	A,B,C,D	A,B,C
2	B,C,A; E,D		B,C,A	C,D,A,B	B,C,A

RATING EXERCISE (Individual Exercise) – WORKSHEET A

Moderator to make sure they do not talk and discuss before completing the exercise.

ASK RESPONDENTS TO TURN TOWARDS THE MODERATOR BEFORE EXPLAINING TO THEM ABOUT THE EXERCISE.

Now, I have some packs/tins/boxes here **[GIVE OUT PACKS 1 BY 1 TO THEM]**. Without discussing with anyone, rate these packs/tins/boxes on your worksheet on a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree:

- The pack/tin/box looks appealing to me
- The pack/tin/box contains <product> that I would most likely smoke
- The pack/tin/box looks like it contains high quality <product>
- The pack/tin/box contains <product> that are easy to quit
- The pack/tin/box looks harmful to health
- The health warning label (picture and message) stands out to me/ catches my attention

RANKING EXERCISE (Individual Exercise) – WORKSHEET B

Moderator to make sure they do not talk and discuss before completing the exercise.

ASK RESPONDENTS TO TURN TOWARDS THE MODERATOR BEFORE EXPLAINING TO THEM ABOUT THE EXERCISE.

[FOR CIGARILLOS] Now, I have two tins here. Without discussing with anyone, please choose which of these two tins do you find to be more likely smoked / higher quality / easier to quit / more harmful to health / contains graphic health warning that stands out more

[FOR OTHER TOBACCO PRODUCTS] Now, I have some packs/boxes here **[SHOW ALL]**. Without discussing with anyone, rank these packs/boxes from 1 to X **[DEPENDS ON TOBACCO PRODUCT]**, with 1 being most likely smoke / highest quality / easiest to quit / most harmful to health / contains graphic health warning that stands out most

- The pack/tin/box looks appealing to me
- The pack/tin/box contains <product> that I would most likely smoke
- The pack/tin/box looks like it contains high quality <product>
- The pack/tin/box contains <product> that are easy to quit
- The pack/tin/box looks harmful to health
- The health warning label (picture and message) stands out to me/ catches my attention

[Moderator to tabulate results on the board]

Appealing

- Which is the most/least appealing?
- Why do you say this? What did you see on the packs that made you feel this way?
- What about the other packs?

Quality

- Which contains the highest/lowest quality <product>?
- Why do you say this? What did you see on the packs that made you feel this way?
- What about the other packs?

Easy to quit

- Which would be the hardest/easiest to quit?
- Why do you say this? What did you see on the packs that made you feel this way?
- What about the other packs?
- Is being hardest to quit better or worse? Why?

Harmful to health

- Which is the most/least harmful to health?
- Why do you say this? What did you see on the packs that made you feel this way?
- What about the other packs?

Health warning label that stands out [Note: Beedies does not have image]

- Which contains health warning label (picture and message) that stands out most / least
- Why do you say this? What did you see on the packs that made you feel this way?
- What about the other packs?

[MODERATOR TO SHOW PROTOTYPE FOR RESPECTIVE GROUP]

- What do you notice when you look at this pack?
- What's the first thing that caught your attention? What else?
- What do you think about the health warning label on the pack?
- Compared to the rest of the packs, would you be more likely to read the health warning label? Why?
- **[SHOW ALL]** which of these stands out least? Why?
- Which of these will most likely make you stop and think about your smoking behaviour?
- Which of these make you consider reducing / quitting smoking?
- **[FOR EACH]** what do you notice first? Image, message or both?

- What do you think of the size of health message?

Message

- What stands out to you about the message [NOTE: REFER TO GHWL text message]? Why?
- How believable is the message? Why?
- Does this contain any new information to you?
- How do you feel when you see this message?
- What is your reaction to the image? Credible? Headline / image fit?

4. Views on standardised packaging of tobacco products 10 MIN/ 100 MIN

- To understand their perception on standardised packaging on cigarettes
- To understand their perception on standardised packaging on other tobacco products like cigars, cigarillo, ang hoon, pipe tobacco and beedies

“Standardised packaging requires all tobacco products to be placed in unattractive packaging, without any promotional information (e.g. logos, colours and imagery) and carries health warnings.”

- How do you feel about cigarette packs with no brand logo and design (e.g. same pack colour for all brand)? Why?
- How do you think standardised packaging will affect cigarette smokers? Why?
- How do you feel about other tobacco products, like cigars, cigarillo, ang hoon, pipe tobacco and beedies having packaging with no brand logo and design (e.g. same pack colour for all brand)? Why?
- How do you think standardised packaging will affect smokers of other tobacco products (non-cigarettes)? Why?

5. Summary and Closing 10 MIN/ 110 MIN

Ask casually the importance of brand in their decision to purchase a particular tobacco product.

- If all packs available in the market are all changed to one packaging, how will you choose which [TEST PRODUCT] pack to buy? How will one pack differ from another?
 - How will that make you feel?
- Out of everything you have seen today, what one thing has had most impact on you?

Before I end this session, do you have any other suggestion or opinion to share with us? If not, this is the end of our discussion. Thank you very much for your time and we value your ideas and feedback.

WRAP UP THE DISCUSSION

Appendix B – Worksheets

WORKSHEET

GROUP: _____

WORKSHEET A1

Group: _____

Based on each box that you see, please rate the extent to which you agree/ disagree to each of the following statements on a scale ranging from 1 to 5, with 1 being Strongly Disagree and 5 being Strongly Agree.

Pack A	Strongly Disagree	Disagree	Neither disagree nor agree	Agree	Strongly Agree
The box is appealing to me	1	2	3	4	5
The box contains cigars that I would most likely smoke	1	2	3	4	5
The box looks like it contains high quality cigars	1	2	3	4	5
The box looks like it contains cigars that are easy to quit	1	2	3	4	5
The box looks harmful to health	1	2	3	4	5
The health warning label (picture and message) stands out to me/ catches my attention	1	2	3	4	5

Please rate the extent to which you agree/ disagree to each of the following statements.

Pack B	Strongly Disagree	Disagree	Neither disagree nor agree	Agree	Strongly Agree
The box is appealing to me	1	2	3	4	5
The box contains cigars that I would most likely smoke	1	2	3	4	5
The box looks like it contains high quality cigars	1	2	3	4	5
The box looks like it contains cigars that are easy to quit	1	2	3	4	5
The box looks harmful to health	1	2	3	4	5
The health warning label (picture and message) stands out to me/ catches my attention	1	2	3	4	5

Please rate the extent to which you agree/ disagree to each of the following statements.

Pack C	Strongly Disagree	Disagree	Neither disagree nor agree	Agree	Strongly Agree
The box is appealing to me	1	2	3	4	5
The box contains cigars that I would most likely smoke	1	2	3	4	5
The box looks like it contains high quality cigars	1	2	3	4	5
The box looks like it contains cigars that are easy to quit	1	2	3	4	5
The box looks harmful to health	1	2	3	4	5
The health warning label (picture and message) stands out to me/ catches my attention	1	2	3	4	5

**END OF
WORKSHEET A1**

WORKSHEET A2

Group: _____

Based on each tube that you see, please rate the extent to which you agree/ disagree to each of the following statements on a scale ranging from 1 to 5, with 1 being Strongly Disagree and 5 being Strongly Agree.

Pack D	Strongly Disagree	Disagree	Neither disagree nor agree	Agree	Strongly Agree
The tube is appealing to me	1	2	3	4	5
The tube contains cigars that I would most likely smoke	1	2	3	4	5
The tube looks like it contains high quality cigars	1	2	3	4	5
The tube looks like it contains cigars that are easy to quit	1	2	3	4	5
The tube looks harmful to health	1	2	3	4	5
The health warning label (picture and message) stands out to me/ catches my attention	1	2	3	4	5

Please rate the extent to which you agree/ disagree to each of the following statements.

Pack E	Strongly Disagree	Disagree	Neither disagree nor agree	Agree	Strongly Agree
The tube is appealing to me	1	2	3	4	5
The tube contains cigars that I would most likely smoke	1	2	3	4	5
The tube looks like it contains high quality cigars	1	2	3	4	5
The tube looks like it contains cigars that are easy to quit	1	2	3	4	5
The tube looks harmful to health	1	2	3	4	5
The health warning label (picture and message) stands out to me/ catches my attention	1	2	3	4	5

**END OF
WORKSHEET A2**

WORKSHEET B1

Group: _____

Based on the boxes that you have with you, please rank the boxes in order of overall appeal, where 1 is most appealing to you, and 3 is least appealing to you.

Rank 1 for the one that is the most appealing overall and 3 for the one that is the least appealing overall

Most appealing overall – Least appealing overall

Pack	Ranking
Pack A	
Pack B	
Pack C	

Rank 1 for the one that contains cigars you will most likely smoke and 3 for the one that contains cigars you will least likely smoke based on packaging

Most likely smoke – Least likely smoke

Pack	Ranking
Pack A	
Pack B	
Pack C	

Rank 1 for the one that that contains the highest quality cigars and 3 for the one that contains the lowest quality cigars based on packaging

Highest quality – Lowest quality

Pack	Ranking
Pack A	
Pack B	
Pack C	

Rank 1 for the one that contains cigars that are easiest to quit and 3 for the one that contains cigars that are most difficult to quit based on packaging

Easiest to quit – Most difficult to quit

Pack	Ranking
Pack A	
Pack B	
Pack C	

Rank 1 for the one that looks the most harmful to health and 3 for the one that looks the least harmful to health based on packaging

Most harmful to health – Least harmful to health

Pack	Ranking
Pack A	
Pack B	
Pack C	

Rank 1 for the health warning label (picture and message) that stands out most / catches your attention most and 3 for the health warning label (picture and message) that stands out least / catches your attention least based on packaging

Stands out most / catches your attention most - Stands out least / catches your attention least

Pack	Ranking
Pack A	
Pack B	
Pack C	

**END OF
WORKSHEET B1**

WORKSHEET B2

Group: _____

Based on the tubes that you have with you, please choose the tube that is more appealing to you.

Circle the number corresponding to the tube you found more appealing (i.e. 1 for Pack D)

Pack	More Appealing
Pack D	1
Pack E	2

Circle the number corresponding to the tube that contains cigars you will more likely smoke (i.e. 1 for Pack D)

Pack	More Likely Smoke
Pack D	1
Pack E	2

Circle the number corresponding to the tube that contains higher quality cigars (i.e. 1 for Pack D)

Pack	Higher Quality
Pack D	1
Pack E	2

Circle the number corresponding to the tube that contains cigars that are easier to quit (i.e. 1 for Pack D)

Pack	Easier to Quit
Pack D	1
Pack E	2

Circle the number corresponding to the tube that looks more harmful to health (i.e. 1 for Pack D)

Pack	More Harmful to Health
Pack D	1
Pack E	2

Circle the number corresponding to the tube that the health warning label (picture and message) stands out more / catches your attention more (i.e. 1 for Pack D)

Pack	Health Warning Label Stands Out More
Pack D	1
Pack E	2

**END OF
WORKSHEET B2**