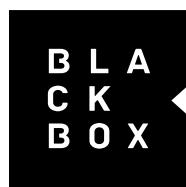


Research Study on Singapore Residents' Perceptions and Behaviours in Relation to Tobacco Packaging

Prepared for:



Prepared by:



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List of acronyms

HPB	Health Promotion Board
FGD	Focus Group Discussion
MOH	Ministry of Health
SES	Socio Economic Status

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Executive Summary

1. The Health Promotion Board (HPB) commissioned this study to better understand 1) the perceptions of current branded packaging of non-cigarette tobacco products and 2) the reactions towards standardised packaging when compared against current branded packaging. Qualitative research in the form of 15 Focus Group Discussions (FGDs) were organised to answer the above research questions.

Perception of branded packaging

2. Overall, branded packaging for non-cigarette tobacco products were perceived by most participants as appealing and attractive. Packaging that came with large white surfaces were perceived as representing a 'clean and healthy' image. For some packaging such as cigars, the designs served to take attention away from the graphic health warning labels. Participants also shared that most of the packaging came across as high-end, classy and trendy which made them think that the products within would be of premium quality.

Appeal and attractiveness of standardised packaging when compared to branded packaging

3. Standardised packaging, when compared to branded packaging, received mostly negative sentiments from participants across all product categories. The standardised packaging products were, on the whole, perceived as less appealing, low-end, and fake. Participants felt that the dark colours and the generic appearance of the packaging reduced the perceived quality and affected the authenticity of the product itself, especially in the case of cigars.

4. There were some deviations from the overall perception that standardised packaging was less appealing and less attractive than branded packaging. A minority of participants from the cigars and pipe tobacco group preferred darker colours as they associated darker colours with stronger flavours. In respect to beedies, less than half of the participants for one of the two sets preferred the standardised packaging, when compared to the pink branded packaging.

Harm to health perceived from standardised packaging as compared to branded packaging

5. There were instances where participants felt that certain products were perceived as healthier, either due to the design of the packaging (e.g. some participants felt that packaging which came in white represented health) or their perception of cigars being healthier as they were wrapped in leaves, and thus contained fewer chemicals. However, standardised packaging helped to negate these perceptions as participants felt that the packaging made the contents within appear more harmful, especially since the packaging was accompanied with larger images and/or text warnings.

Noticeability of health warnings on standardised packaging as compared to branded packaging

6. All the participants shared that the graphic health warning labels were more noticeable on standardised packaging than on branded packaging due to the increase in size. The darker colours of the standardised packaging made the warning labels appear more prominent. Some participants shared that the large size of the graphic health warning labels would act as a deterrence in their purchase of tobacco products as it affected the status associated with the purchase of products such as cigars and pipe tobacco. Participants shared that the graphic health warning labels took over most of the packaging and they had no choice but to look at them, resulting in feelings of 'disgust' and 'gloominess'.

Conclusion

7. Findings from the qualitative study show that branded packaging of tobacco products acts as advertising platforms to attract consumers. They tend to create misperceptions of 'safety', 'health' and 'novelty' by using creative designs to either take attention away from graphic health warning labels or invoke curiosity amongst consumers to try different variations of the same products through the look and feel of packaging that represents different flavours or additives.
8. The findings also suggest that standardised packaging would contribute towards:
 - Reducing the overall appeal and attractiveness of these tobacco products;
 - Increasing the perceived harm that these tobacco products pose to health; and
 - Increasing the noticeability of graphic health warnings.

These findings are supportive of the broader public health objectives of standardised packaging, which are:

- Reducing the attractiveness of tobacco products;
- Eliminating the effects of tobacco packaging as a form of advertising and promotion;
- Reducing the ability of tobacco packaging to mislead consumers about the harmful effects of smoking (including on the relative difference in harmful effects between products);
- Increasing the noticeability and effectiveness of graphic health warnings; and
- Better informing smokers and non-smokers of the risks associated with tobacco use.

1 Project background

1. HPB has commissioned a qualitative study on standardised packaging in relation to non-cigarette tobacco products. The current study utilised solely qualitative methods (i.e. in the format of focus group discussions (FGDs)) and was used to assess Singapore residents' perceptions and reactions towards standardised packaging when compared against current branded packaging for non-cigarette tobacco products, specifically for cigars, cigarillos, pipe tobacco, ang hoon/roll-your-own and beedies.

1.1 Policy objectives

2. The Singapore Government is considering introducing standardised packaging and enlarged graphic health warnings for tobacco products sold in Singapore as further measures in its overall tobacco control strategy. Standardised Packaging (SP) for tobacco products, also known as "plain packaging" or "neutral packaging", refers to the strict regulation of promotional aspects of tobacco packaging and the standardisation of packaging elements. This includes removing all logos, colours, brand images, and promotional information on the packaging, other than brand names and product names (variants) displayed in a standard colour and font style. Standardised packaging is often accompanied by the incorporation of prominent mandatory health warnings.

3. The policy objectives of standardised packaging as announced by the Singapore Government are to:

- Reduce the attractiveness of tobacco products;
- Eliminate the effects of tobacco packaging as a form of advertising and promotion;
- Reduce the ability of tobacco packaging to mislead consumers about the harmful effects of smoking (including on the relative difference in harmful effects between products);
- Increase the noticeability and effectiveness of graphic health warnings; and
- Better inform smokers and non-smokers of the risks associated with tobacco use.

4. The policy is intended to operate alongside other existing and possible future tobacco control measures (such as increased taxation and public education) to contribute towards meeting the Government's obligation under the FCTC, promote public health through the reduction of the prevalence of smoking in Singapore, and thereby constitute a significant step towards Singapore's long-term goal of becoming a tobacco-free society.

1.2 Research objectives

5. The primary aim of the current study is to assess consumer perceptions and reactions towards standardised tobacco packaging when compared against current branded packaging for non-cigarette tobacco products. The research objectives of the study are to examine:

- Perceptions of current branded non-cigarette tobacco products
- Reactions towards standardised packaging when compared against current branded packaging in terms of:
 - Overall appeal and perceived attractiveness
 - Perceived harm to health
 - Noticeability of graphic health warning labels

2 Research methodology

6. To fulfil the research objectives, 15 FGDs were held with regular smokers of five non-cigarette tobacco products: cigars, cigarillos, pipe tobacco, ang hoon, and beedies. Qualitative research was selected for this study to develop an in-depth understanding of the behaviours, perceptions, and attitudes towards standardised vs current branded packaging for each non-cigarette tobacco product.

7. Recruitment criteria included the following:

- Singaporean or Permanent Residents
- Mixture of ages but over 18 years old
- Mixture of gender
- Mixture of ethnic composition
- Regular users (i.e. used product at least once a week)

8. Exclusionary recruitment criteria were used to avoid recruiting participants that would bias the results, such as those working in healthcare, advertisement/creative agencies, market research agencies, and public relations. Potential participants who had participated in other studies on tobacco were also excluded.

9. For cigars, cigarillos, and pipe tobacco, participants with a diverse mix of age, gender, and ethnicity were recruited. As ang hoon and beedies were generally smoked by people of Chinese and Indian ethnicity respectively, recruitment over-sampled for these two ethnicities over a more balanced mix. It was noted that most users of non-cigarette tobacco products also smoked cigarettes, although this was not one of the recruitment criteria.

Table 1: Product segments and recruitment specifications

Segment	# of Groups	Participants	Specification
Cigars	3	8 to 10 per group	Age 18 and above, good mix of races across those who smoke cigars weekly
Cigarillos	3	8 to 10 per group	Age 18 and above, good mix of races across those who smoke cigarillos more than once a week, smoke premium or economy cigarillos
Pipe tobacco	3	8 to 10 per group	Age 18 and above, good mix of races across those who smoke pipe tobacco more than once a week
Ang Hoon / Roll Your Own	3	8 to 10 per group	Age 18 and above, more Chinese participants than other ethnic groups, smoke ang hoon more than once a week
Beedies	3	8 to 10 per group	Age 18 and above, more Indian participants than other ethnic groups, smoke beedies more than once a week

2.1 Qualitative discussion guide

10. A discussion guide was developed for use during the qualitative discussions for each tobacco product category and was approved by HPB before use. The general structure of each guide was as follows:

- Introduction
- Understanding existing tobacco use and purchase behaviour
- Relationships with brands

- Testing perceptions towards branded vs standardised packaging in terms of:
 - Appeal of tobacco packaging and perceived attractiveness of tobacco products
 - Perception of harm to health
 - Noticeability of graphic health warning labels.

11. The full discussion guide can be found in Annex I – Discussion Guide.

2.2 Stimulus

12. A mix of showcards containing images of non-cigarette tobacco products and actual packaging of non-cigarette tobacco products were shown for all product categories except for beedies, where a mock-up of the physical packaging was shown to participants. The showcards and the mock-up of the physical beedies packaging were created by a graphic designer. The showcards used can be found in Annex III – Stimuli Pictures.

2.3 Qualitative analysis

13. A thematic analysis model was used for the qualitative research. This involved analysing participant views and opinions across groups in each product category to find common themes and patterns in response to the different stimuli shown, until a saturation point was reached, i.e. no new findings emerged for each product category.

3 Key findings

3.1 Cigars

3.1.1 Description of participants

14. Most of the participants for the cigar FGDs were male, ranged between 25 to 45 years of age and belonged to the higher income bracket. They valued status, and enjoyed expensive pastimes such as collecting watches, drinking whisky, and travelling.

15 Participants shared that cigars were different from other tobacco products in that they were smoked in different settings or events, rather than merely to serve a smoking habit. Participants had been introduced to the product during business events or when drinking high-end alcoholic drinks, such as whisky or wine with peers. The main motivation for continuing with cigar-smoking was that cigars lasted a long time, so it was possible to extinguish the cigar and return to it later instead of finishing it in one go. Another major reason for smoking cigars was the aromatic smell. Cigars were also perceived as being “natural” and “healthier” than cigarettes as they are wrapped in leaves (thus perceived as containing fewer chemicals) and the smoke was not inhaled.

“The fragrance, it's a very attractive kind of strong smell, like very strongly kind of stuff. The best thing is you don't have to inhale in.”

Male, Chinese, 36 to 45 age group

16. Participants also associated cigar smoking with a desired lifestyle, stating that it was linked to ‘manliness’, ‘social status’, and ‘maturity’. Cigars were usually purchased online, from abroad, in duty-free shops or in specialty shops and bars. Product preferences and brands that participants smoked were highly dependent on the occasion, as smokers would select which brand to smoke depending on where and with whom they were smoking it. For example, if they were smoking with a client, more expensive brands like Cohiba would be used, while a cheaper alternative such as Davidoff may be smoked at home or with peers. Some examples of situations where cigars were smoked included:

- At home where cigars were smoked to unwind, either alone or with peers or family members

“It's like my family gathering because I have a cousin that loves to smoke cigar. So whenever he flies to other country, then he will bring some back then we will try it.”

Male, Chinese, 36 to 45 age group

- In restaurants or bars where cigars were an accompaniment to whisky or other high-end alcoholic drinks

“We will sometime hit like the cigar bars where you can actually smoke inside, drink some whisky.”

Male, Chinese, 46 to 60 age group

- Smoked in business settings, such as during meetings or when signing contracts, to bond with clients or celebrate achievements

“You see the purpose of smoking cigar for me is to get close to certain customers, so I believe when they pass me some expensive cigar, I dare not pass them my Davidoff”

Male, Chinese, 36 to 45 age group

3.1.2 Perception of current branded packaging of cigars

17. Participants were shown showcards of cigar packaging, then asked for their feedback on perception of current branded packaging in terms of appeal and attractiveness.

Table 2: Branded packaging for Cigars

Branded Packaging	Set 1	Set 2	Set 3	Set 4	Set 5
					

18. Most participants did not have specific brand preferences and were willing to try different cigars for the sake of novelty. For those that had specific brand preferences, the main reasons for choosing those brands over others were based on the following criteria:

- Availability / ease of purchase;
- Reliability of quality;
- Value compared to other cigars (for self-consumption); and
- Smell and taste.

19. Availability and ease of purchase played a big role in brand preferences (for personal consumption), as being able to purchase a product right away, without having to order online and wait, was a large motivator. For value, participants preferred products that were not too pricy but also “strong enough” in taste and aroma. For quality, some participants complained about the quality control of certain cigar brands, as they had a higher incidence of faulty cigars (would not light, knot in the middle, hard to suck, etc.) than more reliable brands like Cohiba. Smell and taste also played a role but were not as prevalent as the first 3 criteria.

“Obviously, number one is the accessibility, you don't have to go online and find and import ... I would say ease accessibility.”

Male, Chinese, 36 to 45 age group

“Like some cigars are not reliable. Like you smoke halfway, they keep dying. I don't know is it like the storage process or some other problems. Or sometimes you buy a cigar, you cannot suck it. There's like a knot in the cigar, so it's basically gone to waste. So there are certain brands that I would avoid because of the experience.”

Male, Chinese, 45 to 60 age group

“I mean they are strong enough. It's overall, good cigar but in terms of price, it's fraction of the price because I think they are made in the Dominican Republic instead of Cuba.”

Male, Chinese, 26 to 35 age group

20. For participants with brand preferences, it is likely that they would switch to other brands (for personal consumption) if they were readily available, were of good value, had reliable quality, and had good enough taste and aroma.

Set 1**Branded Packaging**

21. Participants indicated that the wooden box of cigars was a familiar sight as they associated it with the look and feel of cigar packaging. The wooden box was equated with good quality and contributed to the overall experience of smoking a cigar. Products with such packaging were perceived as being premium and high-end. The box looked sturdy and made the logo visible and catchy.

“For as long as anybody who smoked cigar should know, a wooden box is made for a cigar”

Male, Chinese, 46 to 60 age group

“So it’s the quality of the packaging...the first glance you know that, eh, that’s a quality of product. They take the time and effort to make a box for that...it looks hand crafted, very premium.”

Male, Chinese, 35 to 46 age group

Set 2**Branded Packaging**

22. The packaging was perceived as trendy, colourful and attractive. The whiteness of the packaging coupled with the floral imagery made people think of Christmas. It also served to take attention away from the graphic health warning labels on the packaging.

“It feels like a fruity taste. More of a festive Christmas season kind of thing”

Male, Chinese, 36 to 45 age group

“Actually I didn’t notice that [open-heart surgery graphic], I was attracted by the leaves”

Male, Chinese, 18 to 25 age group

“...I feel like, they are trying to be trendy and hip, and like going more into the healthier, vegan style”

Male, Chinese, 26 to 35 age group

Set 3



23. Participants found the white colour of the packaging to be classy and professional. The whiteness of the packaging contributed to its 'clean and healthy' image and was perceived to contain cigars of premium and good quality. As a result of its perceived image, participants felt that the taste of the cigar would be smooth and light.

"To me, it's always about the colour. White always feel high class."

Male, Chinese, 26 to 35 age group

"Aesthetically pleasant. You can see what is inside. They pack the cigars inside, and then if this is opaque or dark right, you can't see whether the cigars is damaged or not..."

Male, Chinese, 36 to 45 age group

Set 4



24. The branded tubes were perceived as clean and high-end by most of the participants. Most perceived the design on the tubes to be traditional and easily recognisable. The colour of the tube along with the imagery contributed to a sense of familiarity, and this was sufficient to entice participants to make a purchase even without logos.

"It's more vibrant, there's more colour combination. There's a little bit of those checkered dots design. It gives a feeling of classiness. Or rather, more expensive sticks"

Male, Chinese, 36 to 45 age group

"The perception is this is a high-end product [because of] the colour combination-the white, the red. The way the label is affixed."

Male, Chinese, 36 to 45 age group

"It's a very familiar design and colour [Cohiba yellow and black]. So you know, we are creatures of habit. We will go back to something that we know of"

Male, Chinese, 46 to 60 age group

Set 5



25. Findings for the cigar stick were similar to that of cigar tubes, i.e., most participants perceived the band on the cigar stick to be classy and well-designed. The brand and design was easily recognisable and made people perceive the stick to be manlier and with more of a European design.

"I will definitely buy this. This looks very traditional I feel...looks like a high-end product"

Male, Chinese, 36 to 45 age group

"I find that it looks more authentic, gives you a more like European style"

Male, Chinese, 26 to 35 age group

3.1.3 Reactions towards standardised packaging when compared against current branded packaging

Table 3: Branded and standardised packaging for Cigars

	Set 1	Set 2	Set 3	Set 4	Set 5
Branded Packaging					
Standardised Packaging					

26. Typically, when a standardised version of the various packaging types was shown to participants, it drew largely negative sentiments. Participants were asked for their feedback for the standardised packaging when compared to current branded packaging in terms of:

- Overall appeal and perceived attractiveness;
- Perceived harm to health; and
- Noticeability of graphic health warning labels.

Appeal and perceived attractiveness

27. Overall, standardised packaging inspired more negative feelings from participants than branded packaging did and was generally described as the less appealing packaging option.

Set 1

Branded packaging	Standardised packaging
	

28. The qualitative findings showed that standardised packaging was perceived as less authentic, cheap, and contained cigars of low quality. Some participants thought that the packaging contained cigars of a generic brand as the lack of brand imagery did not provide any information on product history.

"[Branded packaging] looks like very hand crafted, very premium. Rather than [standardised packaging], it looks cheap"

Male, Chinese, 34 to 45 age group

"The first glance you know that, eh, [branded packaging is] a quality product. They take the time and effort to make a box for that"

Male, Chinese, 46 to 54 age group

Set 2

Branded packaging	Standardised packaging
	

29. The majority of the participants felt that standardised packaging reduced the appeal and attractiveness of cigars. The lack of branding coupled with the large health warning labels made participants think of the packaging as part of a 'quit smoking' ad campaign and not associate it with a cigar box. Some participants also shared that they would feel negative having it in their possession as it would affect their image and affect how others would view them.

"Maybe I feel ashamed carrying this. If like my friends or my girlfriend see...my parents, see even the box telling you to quit already"

Male, Chinese, 18 to 25 age group

"It does not look elegant at all"

Male, Chinese, 26 to 35 group

"Boring, dull...The warning picture is large."

Male, Chinese, 26 to 35 group

30. However, a few participants did express preference for standardised packaging instead. This was due to their preference for darker colours as they associated darker colours with stronger flavours which impacted their preference when purchasing tobacco products. In addition, the participants shared that they perceived Set 2 (i.e. branded packaging) to be too 'feminine' or 'childish'.

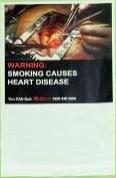
"I am always comfortable with something black and dark. Just simple and plain. Yeah, not too much design and patterns"

Male, Chinese, 46 to 60 age group

"[branded packaging] looks like some kind of kiddy, kind of woman, kind of cigar or something [whereas standardised packaging looks like] plain and simple. No nonsense. You just know that the packaging is what you get."

Male, Chinese, 36 to 45 age group

Set 3

Branded packaging	Standardised packaging
	

31. Similar to the other standardised packaging types, set 3 (i.e. standardised packaging) was perceived as less clean, less attractive, and containing cigars of lower grade than branded packaging. It reminded some participants of a rubbish bag because of the dark colour, even though both the branded packaging and standardised packaging were made of plastic.

"I associate this packaging now with very sub-standard quality"

Male, Chinese, 36 to 45 age group

"the Ziplock bag, [the standardised package one on the] right, it looks like a rubbish bag"

Male, Chinese, 36 to 45 age group

"[Standardised packaging] is more of unappealing, the [warning] picture is so big"

Male, Chinese, 26 to 35 age group

Set 4

Branded packaging	Standardised packaging

32. Standardised packaging greatly reduced the attractiveness and appeal of cigars. The packaging made some participants think of smoking charcoal because of the colour of the packaging.

“Because like dark colours usually you will associate with more sinister type of thing”

Male, Chinese, 36 to 45 age group

“The design is very dull, full black colour”

Male, Chinese, 26 to 35 age group

Set 5

Branded packaging	Standardised packaging

33. The plain standardised band on the cigar sticks appear less authentic, cheap and of low quality. Some participants shared that the cigar stick might be fake or those from generic brands.

“[standardised packaging] looks like a replica, a knock-off”

Male, Chinese, 36 to 45 age group

“It looks like they did not spend any time on the design, appears low quality”

Male, Chinese, 26 to 35 age group

Perceived harm to health

34. The qualitative findings were similar across all standardised packaging types, that the darker colour of the packaging together with the large health warning labels made participants feel that the cigars in standardised packaging were more harmful to health than those in branded packaging. They associated the dark colours with words like ‘death’ and ‘toxicity’.

“The thing is they emphasise more on this image, so it actually it’s very- when it looks bigger, it looks like it’s more harmful”

Male, Chinese, 26 to 35 age group

“The word on the side. The yellow quite distasteful. Yeah I don’t like to – black and yellow is- unless you put yellow on the Ferrari, looks good. You put on cigar packaging, it looks negatively striking”

Male, Chinese, 36 to 45 age group

"It's too poisonous. It just looks so dull and so dirty. It makes me feel the inside the cigar, like a bit dirty like that. Which makes it more harmful, I guess."

Male, Chinese, 36 to 45 age group

Noticeability of graphic health warning labels

35. All participants shared the same sentiments, that the image and text warning on standardised packaging were more visible. Health warnings were described as more shocking and very noticeable. The bigger warning labels on standardised packaging would make them less likely to buy and was a turn-off. The lack of logo and imagery and the presence of the health warnings was a deterrence in showing off the products to other people. Some participants even commented that the health warnings would cause them to quit smoking.

"Make it very clinical, and it's frankly very graphic"

Male, Chinese, 36 to 45 age group

"You can see more details [in standardised packaging] compared to the white one. The picture is bigger, so if you stare at it for long, you will feel very disgusted"]"

Male, Chinese, 46 to 60 age group

"[standardised packaging] is more in your face, like it's telling you if you smoke this one, you will die"

Male, Chinese, 36 to 45 age group

"And [standardised packaging] is even worse than the first one. This one has nothing but health warnings. So when I looked at it, like it went quit, quit, quit now"

Male, Chinese, 36 to 45 age group

3.2 Cigarillos

3.2.1 Description of participants

36. Most of the participants for the cigarillo FGDs were males, between 26 and 45 years of age, and in the high income bracket. Participants were also divided into those that purchased premium cigarillos and those that purchased economy ones. Cigarillo users value the image and status associated with smoking premium cigarillos but also valued novelty as they like to try the different flavours available.

37. The participants shared that they had been first introduced to cigars but had not liked the taste of the cigars or did know how to smoke them properly. They were then introduced to cigarillos by their peers or business associates and clients.

38. The participants voiced out several reasons for smoking cigarillos:

- Convenience: cigarillos were faster to smoke than cigars; do not require any special equipment in order to be smoked and can be finished in one sitting, unlike cigars which may require several sittings in order to finish.
- Have a milder taste as compared to cigars
- Are available in many different flavours.
- Associated with the same lifestyle as that of cigars, i.e. high end, maturity etc. Similar to cigars, they were perceived as being more refined and sophisticated as compared to smoking cigarettes.
- “Healthier” than cigarettes as you don’t inhale the smoke

39. Cigarillos were mostly smoked at home, in professional settings or when relaxing with peers. They were used to relax and unwind. Some users commented that they smoked cigarillos when they wanted something stronger than cigarettes in places such as wine bars.

“I usually smoke when I chill out with my friends. Sometimes even over poker, with whisky, we can smoke. We usually meet once a week.”

Male, Indian, 36 to 45 group

“Depends, sometimes more [than once a week] because if my friends want to hang out again at the bar. Everyone is smoking, and it is nice at the bar, you meet a lot of people”.

Female, Chinese, 26 to 35 group

3.2.2 Perception of current branded packaging of cigarillos

40. Participants were shown showcards of cigarillo packaging before being asked for their feedback on perception of current branded packaging in terms of appeal and attractiveness.

Table 4: Branded packaging of Cigarillos

Branded packaging	Set 1	Set 2
		

41. Cigarillos were purchased in a wide variety of locations, including online, from abroad and retail shops. The product and brand preference are based on the quality and characteristic of the product, with smoothness of the taste and flavour being the primary selection criteria. Majority of the participants commented that Davidoff was their personal favourite as it was described as smooth with a nice aftertaste. However, they shared that they were not loyal to a particular brand as they smoked cigarillos mainly for the purpose of trying different flavours.

“The taste is important...I will prefer the cigarillo [when compared to more expensive cigars]. The reason is I can taste the flavour which is sweeter and creamier.”

Male, Chinese, 26 to 35 group

“When I go like Malaysia then they have like those kind of cigarette shops. They got so many different types of different kinds of cigarillos. So, every time I will just pick...by the flavours...I just try different types.”

Male, Chinese, 26 to 35 group

“Davidoff products are smooth...it’s very enticing.”

Male, Chinese, 36 to 45 group

Set 1

Branded Packaging


42. The wooden box was perceived as being elegant and classy and made tobacco products attractive. It was easily recognisable by the participants due to the presence of the logo and the seal on the packaging.

“I will go with the wood, it’s more antique feel and very classy”

Male, Chinese, 26 to 35 age group

"For me it's the wording '100% tobacco' and the quality' seal" which equates with good quality"

Male, Chinese, 36 to 45 age group

Set 2

Branded Packaging



43. The tin packaging was perceived as classy, stylish and familiar. The word 'chocolate' primed people for smoking and made them think about the flavour of the cigarillos inside the packaging.

"It's better presentation rather than cigarettes. It's like when you open it, you have that feeling, wow"

Male, Malay, 26 to 35 age group

"...the font, the colour scheme, and also the way it is put as well. The selection gives it a level of sophistication, prominence"

Male, Chinese, 36 to 45 age group

3.2.3 Reactions towards standardised packaging when compared against current branded packaging

Table 5: Branded and standardised packaging for Cigarillos

	Set 1	Set 2
Branded packaging		
Standardised packaging		

44. Again, when a standardised version of the various packaging for cigarillos were shown to participants, it drew largely negative sentiments. Participants were asked for their feedback of the standardised packaging when compared to current branded packaging in terms of:

- Overall appeal and perceived attractiveness;
- Perceived harm to health; and
- Noticeability of graphic health warning labels.

Overall appeal and perceived attractiveness

45. For both sets, participants shared that the standardised packaging was badly designed and appeared to be a fake or imitation product. It was perceived as having cigarillos that were cheap and of lower quality and reminded participants more of a cigarette box; thus implying that the tobacco product had been stripped off its refinery and sophistication due to the colour of the packaging.

"For me, it differs from the original packaging and duller colour will actually not attract me that much. Whereas a shinier or brighter colour will attract me to try. Duller colours might be like they change packaging or maybe this might not even be real"

Male, Chinese, 18 to 25 age group

"...because packaging is really important. If you put effort into your packaging, everyone knows. First impression's better. If this is something I have not tried before, looking at the two, there's more effort gone into this, in the design [branded packaging], so it probably has a better product."

Male, Chinese, 26 to 35 age group

"The colour, the presentation of it. The overall aesthetics of it. I really think that [branded packaging], the designer of the tin or this box, has put more effort into it. Colour scheme, the font. It is designed to attract, even with the health warning over there."

Male, Chinese, 26 to 35 age group

"Do you know why I want to choose [branded packaging]? The chocolate with the cursive and when you compared with [standardised packaging]. Cancer mean, people will think that you are smoking cancer mean. The chocolate word is so small who can see that?"

Male, Chinese, 36 to 45 age group

46. On the other hand, there were a small number of participants who expressed preference for both sets of the standardised packaging as they shared that it looked 'sleek' and 'simple', and it was also a matter of personal preference of the colour of the particular packaging.

"Simpler as in the nice kind of simple, yeah. Because [branded packaging] looks very complicated. I don't like it, it looks like chewing gum"

Male, Indian, 26 to 35 age group

"Sleek design. And it looks like actually a small box of chocolate"

Female, Chinese, 26 to 35 age group

"Personal preference of the colour, it feels clean."

Male, Chinese, 36 to 45 age group

Perceived harm to health

47. Majority of the participants shared that the dark colour of the packaging drew their attention towards the large graphic health warning labels as well as the health information that was printed against the yellow background as it made them appear more striking. Participants used terms such as 'rat poison', 'chemicals' to describe the packaging and associated it with a 'pest control box' due to the colour.

"I have lost a few loved ones; this packaging magnifies the health issues and will constantly remind me that you will be next"

Male, Chinese, 46 to 60 age group

"When I see [standardised packaging], immediately, I feel more threatened. Three-quarter of the whole thing is that gory scene..."

Male, Chinese, 26 to 35 age group

"This looks like someone typed it out on Microsoft Word, using Arial and stuck it on there. It looks like I would actually die if I smoked this. The colour makes me think of rat poison. I've been wondering what does it remind me of, why am I so disgusted by the colour? And now I realize, it looks like rat poison or that mosquito coils. Similar colour."

Male, Chinese, 26 to 35 age group

Noticeability of health warning labels

48. All participants commented that the image and text warning were much more noticeable on the standardised packaging. The image was hard to ignore due to its size and was described as overwhelmingly disgusting and was considered a turn-off. The image also contributed to the overall 'gloominess' of the packaging because it covered most of it.

"the picture still so big. Black colour enhances the picture"

Male, Malay, 36 to 45 age group

"When I see [standardised packaging], immediately, I feel more threatening, definitely. I don't see anything else other than the small hero chocolate, right? Three-quarter of the whole thing is that gory scene like you mentioned."

Male, Chinese, 36 to 45 age group

"If I take this package right, and then I see it, I will think twice about whether I want to buy or not. Because the picture is quite big, the warning sentence is also quite big also. So I might not choose this."

Male, Chinese, 26 to 35 age group

So it's overwhelming. This one the pictures, the surgery pictures...overwhelms the box, actually"

Male, Chinese, 18 to 25 age group

3.3 Pipe tobacco

3.3.1 Description of participants

49. Almost all participants for the pipe tobacco FGDs were male and ranged from 26 to 45 years of age. Most participants had high income and valued activities and pastimes that show their status and individuality, such as traveling, going to the gym, and drinking whisky.

50. Participants were introduced to pipe tobacco by family members or close business associates. The main motivation to continue smoking pipe tobacco was that it was a niche activity, was viewed as being refined and “gentlemanly”, and required a certain skillset to properly pack and light a pipe. The fact that pipe smoking was less common than smoking cigars or cigarillos made pipe smokers appreciate it more. A few participants mentioned smoking ang hoon in their pipe to save on costs.

51. Participants generally smoked pipe tobacco alone or with close family members or peers. On other occasions, participants would default to smoking what others around them were smoking, such as cigarettes or cigars.

- Pipe tobacco is smoked predominantly in the home

“That depends on the location you’re in. At home, after work, with a nice whisky, I smoke a pipe”

Male, Chinese, 36 to 45 age group

- Pipe smoking is generally done alone, as it is not a common pastime for many

“After a hard day’s work, I will usually stay at home and relax by myself, you know, chill myself down.”

Male, Chinese, 26 to 35 age group

- When not alone, pipe smokers tend to smoke whatever their peers are smoking

“Friends, usually they smoke whatever you smoke. Usually you will hang out with the same clique that smokes the same thing ... and I only know one other person that smokes a pipe.”

Male, Chinese, 36 to 45 age group

3.3.2 Perception of current branded packaging of pipe tobacco

52. Participants were shown showcards of pipe tobacco packaging before being asked for their feedback on perception of current branded packaging in terms of appeal and attractiveness.

Table 6: Branded packaging for pipe tobacco

Branded Packaging	Set 1	Set 2
		

53. Participants in the FGDs usually purchased pipe tobacco online or abroad, and sometimes at retail shops in Singapore. Product preferences varied widely, so brand choices were not consistent

across participants. Generally, the participants tried different brands and settled on a few they liked based on the strength and flavour of the product.

54. When participants were describing the brands they prefer, they generally described the flavour profile, such as it being smooth or heavy bodied, and the aroma.

"Yes, it's very different from, you know, when you get the good one means you get the good one. The aroma is just beautiful"

Male, Chinese, 26 to 35 age group

"For me, I personally prefer a heavy bodied taste over a smooth taste."

Male, Chinese, 36 to 45 age group

55. When describing the main reasons for their brand loyalty, the participants cited risk aversion related to the cost of trying an unknown brand and tradition from having smoked the same brand(s) for a long time. Nonetheless, peer influence or impulsiveness can make people try new brands.

"I did try other brands, it's just that it doesn't suit me, you know, that kind of flavour that I want. So, really, that's kind of saying – very personal, I don't know how to describe"

Male, Chinese, 25 to 36 age group

"friend's recommendations [would make me try new brands]. If my friend says, "Look this one tastes nice. Maybe you can try." then I'm gonna try it".

Male, Malay, 36 to 45 age group

"Very seldom for any smokers, we change for fun. Unless you go to duty-free, then you say, "Hey what's this brand. It looks a bit nice. The packaging. Let's try." But I don't think we will throw 14 bucks in a normal provision shop and say, "This is 14 bucks, let me smoke something else for fun. ""

Male, Chinese, 46 to 60 age group

"For me it's from my school days. So, I've tried a few but I found this brand also is like you said, must be reliable and trustworthy"

Male, Chinese, 26 to 35 age group

56. When shown Sets 1 and 2, it was observed through the discussions that the following factors impacted participants' perceptions and reactions towards the different packaging design:

- Many had bought their products online or from other countries which resulted in their inability to recognise the retail packaging produced by the local retail stores;
- The lack of logo on branded packaging [Set 1, the logo was at the bottom which was not highly visible and for Set 2, the packaging did not carry the product logo but rather the logo for the retail shop] impacted perceptions; and
- Pipe users' preference for stronger taste which they associate with darker colours affected their reactions towards standardised and branded packaging.

Set 1



57. Participants were divided over which packaging was the most appealing, as slightly over half of all participants found the orange packaging (branded packaging) as attractive, bright, and premium, while the remaining Participants perceived it as low quality, fake, and unappealing when compared to standardised packaging.

“Orange not so sad colour, happier colour and orange with black is always-it’s quite a good mix.”

Male, Chinese, 26 to 35 age group

“The colour [on branded packaging] is brighter, it looks more attractive. The [standardised packaging] is a bit dull. It's a bit dull so I won't buy. I like brighter colours.”

Male, Chinese, 26 to 35 age group

58. Some of the other participants considered the branded packaging to be made of cardboard and considered it to contain tobacco products of lower quality and fake.

“This one, just looks ... [like] the colours don't really complement-I mean, the colours don't really complement ... the label itself is pretty dark and then there's this like bright orange and then there's this chequered pattern-the design doesn't really look very visually appealing”

Male, Chinese, 36 to 45 age group

“the colour maybe like cardboard”

Male, Chinese, 46 to 60 age group

“[branded packaging] looks like a toy”

Male, Chinese, 36 to 45 age group

Set 2



59. Majority of the participants perceived branded packaging to be genuine, pure, and perceived the taste to be light because of the white colour packaging. Participants also perceived the branded packaging as more familiar and authentic because of the logo on the packaging. Most found the contrast between the logo and the other parts of the packaging to be visually appealing.

"The branding and the white colour ... it just feels pure"

Male, Chinese, 36 to 45 age group

"I think the colours, want to compare some message, cigarettes, right, you buy white colour, mostly it's like Marlboro Light or Menthol Light, something like that. Because cigarettes, light is white- white colour is like light"

Male, Malay, 26 to 35 age group

"I choose [branded packaging] because of the brand actually. So, like I said, if let's say the brand was achieved, I will go for [branded packaging]"

Male, Chinese, 26 to 35 age group

3.3.3 Reactions towards standardised packaging when compared against current branded packaging

Table 7: Branded and standardised packaging for pipe tobacco

	Set 1	Set 2
Branded Packaging		
Standardised Packaging		

60. As before, when a standardised version of the various packaging for pipe tobacco was shown to participants, it drew largely negative sentiments. Participants were asked for their feedback of the standardised packaging when compared to current branded packaging in terms of:

- Overall appeal and perceived attractiveness;
- Perceived harm to health; and
- Noticeability of graphic health warning labels.

Overall appeal and perceived attractiveness

Set 1

Branded packaging	Standardised packaging
	

61. Standardised packaging was perceived as more coherently designed, exclusive, and established by around half of all participants. The darker colour of the packaging made these participants think that the tobacco was stronger flavoured than branded packaging. The remaining participants did not find the packaging on standardised packaging appealing, describing it as lower quality. The larger health warnings and pictures played a large part in making the packaging for standardised packaging unappealing.

“[branded packaging] colour is nice, it looks like premium brand”
Male, Chinese, 36 to 45 age group

“[branded packaging is] attractive and look friendly”
Male, Indian, 18 to 25 age group

“The product design, in my opinion at least, you know, the colour scheme is pretty uniform, and the colours used is pretty good as well, there's black and yellow, very contrasting”
Male, Chinese, 26 to 35 age group

“I just think that when it's more available to high-end premium product, they tend to have a very dark colour scheme. At least that's what I feel. Because design-wise, I think there's a lot of time, when you go high-end and premium, tends to have a very dark to it, dark colour scheme.”
Male, Chinese, 46 to 60 age group

Set 2

Branded packaging	Standardised packaging
	

62. Majority of the participants perceived branded packaging to be genuine, pure, and light tasting, mainly because of the white colour of the packaging and the familiarity and authenticity of having the logo on the packaging.

[Branded packaging] is definitely more authentic. You know, the more cheong one."

Male, Chinese, 36 to 45 group

"If you choose between these two, [branded packaging] – I mean, like there's a brand, then [standardised packaging] has nothing."

Male, Chinese, 35 to 46 age group

63. The lack of branding was the major reason participants cited for not finding the standardised packaging appealing. The packaging was described as cheap, low class, and fake. The dark colour of the packaging did make people perceive it as having a stronger flavour when compared to branded packaging.

"My friends would think I am low class if they saw me holding [standardised packaging product]."

Male, Chinese, 26 to 35 age group

"We don't know what it contains, it could be fake."

Male, Chinese, 26 to 35 age group

Perceived harm to health

64. The findings for perceived impact on health were similar across all package types. The larger picture and prominent health warnings paired with the dark colour of the packaging made participants feel that standardised packaging would have a more harmful impact on their health.

"Because of the shock treatment. No, it doesn't give you a message at all. It just frightens you without telling you why."

Male, Chinese, 26 to 35 age group

"It's just right there in your face ... I'm going to get heart disease."

Male, Chinese, 26 to 35 age group

Noticeability of graphic health warning labels

65. Most participants found that the warnings and pictures on standardised packaging were more noticeable than those on branded packaging. Standardised packaging was described as more noticeable and a turn-off, and the lack of branding and dark colour made the health warnings and labels more noticeable than on the branded packaging.

"I would choose [branded packaging] because it has less of the warning sign and ... the picture is a turn off. It was – if I don't smoke, I look at the picture, I will think twice about smoking."

Male, Chinese, 36 to 45 age group

"The image itself is smaller compared to the one on [standardised packaging]. There's no health warning compared to the one on [standardised packaging]."

Male, Chinese, 46 to 60 age group

66. For set 1 (i.e. branded packaging), a minority of participants mentioned that the lack of side text warning signs on the branded packaging made them trust it less than the standardised packaging. The reasoning was that those participants correlated the lack of information on the branded packaging

to mean that the product was not legitimate, as the Singaporean government requires all tobacco packaging to have those warnings. In other words, the warnings and pictures served as verification that the standardised packaging product was authentic.

“If you’re talking about authentic, because in Singapore all these government warnings and things have to be there, so [standardised packaging] must be authentic. If it is [branded packaging] then it’s not authentic, because it’s not from Singapore.”

Male, Malay, 36 to 45 age group

“Operation is always there. It can be a fake operation or whatever it is. But you know at the side has all the government warnings, so you think it’s less authentic.”

Male, Chinese, 36 to 45 age group

3.4 Ang hoon

3.4.1 Description of participants

67. About three quarters of the participants for the ang hoon FGD were male, ages were well distributed along the 18 to 60 age range, and most had low income. Due to the varied age groups, pastimes and activities varied widely amongst participants.

68. Participants were introduced to ang hoon by family members or peers. The main motivation for continuing to smoke ang hoon was to save money as ang hoon was more economical than cigarettes. Stronger flavour and control over the amount of tobacco in each stick were secondary reasons for continuing to smoke ang hoon. A few also mentioned that ang hoon had fewer chemicals and was thus healthier than cigarettes.

69. Participants generally smoked ang hoon on their balcony or in another place protected from the wind (which scatters tobacco and makes it hard to roll). A few also rolled and smoked ang hoon inside the house. Ang hoon is smoked alone to relax and unwind, or when socialising with peers.

- Ang hoon is smoked outside the house

“It’s very light. Once a bit of wind, it will fly everywhere. That’s why at home, I will go to my balcony there and roll. I smoke at the balcony”
Male, Chinese, 26 to 35 age group

“it’s messier at home. You roll, all the things will fly away. Initially I started to roll, my wife grumbled. The whole floor was covered in tobacco”
Male, Chinese, 36 to 45 age group

- Ang hoon is smoked to relax and unwind

“After dinner, I will slowly roll and smoke ... It’s more of a relaxing process for me.”
Male, Malay, 26 to 35 age group

“Rolling ang hoon is actually very relaxing when you are stressed, you know?”
Female, Chinese, 26 to 35 age group

- Ang hoon is smoked with peers

“If my friends and I are having a barbecue at East Coast Park, just like a gathering, then I will just bring [my ang hoon] and smoke it.”
Male, Indian, 26 to 35 age group

“You outside chill with friends or go friend’s house to chill, you take out the hand rolling one.”
Male, Malay, 18 to 25 age group

3.4.2 Perception of current branded packaging of ang hoon

70. Participants were shown showcards of ang hoon packaging before being asked for their feedback on perception of current branded packaging in terms of appeal and attractiveness.

Table 8: Branded packaging for ang hoon

Branded Packaging	Set 1	Set 2	Set 3	Set 4
				

71. Participants in the FGDs usually purchased ang hoon in convenience or sundry shops ("mama stores"). A few reported purchasing ang hoon in Malaysia for the lower price and a wider variety of flavours available. Product preference within the different ang hoon brands was based mainly on aroma and taste.

72. Participants described their preferred brands as having a good aroma and smooth taste.

"The aroma is very nice. Quite solid."

Male, Malay, 18 to 25 group

"Doesn't hurt my throat, quite smooth."

Female, Malay, 26 to 35 group

73. Brand loyalty was high, but peers could convince participants to try new brands.

"If my friend says it's good, then you just go and try, you ask him to roll you one stick."

Male, Chinese, 26 to 35 age group

Set 1

Branded Packaging


74. Participants perceived the branded packaging as sleek and clean, having an even minimalist design. They also considered the product to be of high quality and expensive due to the packaging.

"[branded packaging] looks more professional, has more details, it is easy to look at."

Male, Malay, 36 to 45 age group

“For overall packaging, I want something that is really straightforward and neat, so that is why I like [branded packaging].”

Male, Chinese, 46 to 60 age group

Set 2



75. Participants described the branded packaging as attractive, elegant, and eye catching. The prominent logo makes the packaging feel more familiar and recognisable. The colour in the packaging also made a few participants think it was menthol flavoured.

“Why would I buy [branded packaging]? Because it looks more elegant.”

Male, Chinese, 26 to 35 age group

“The brand and the colour are eye catching.”

Female, Malay, 26 to 35 age group

“I am more a menthol guy. So I see [branded packaging], it’s like menthol so I will buy.”

Male, Chinese, 36 to 45 age group

Set 3



76. Participants perceived the branded packaging as attractive, bright, and premium. The logo on the packaging was also recognisable by participants.

“[branded packaging] looks bright and attractive”

Male, Chinese, 18 to 25 age group

“I like [branded packaging] because there is equal balance between the brand and the image.”

Male, Indian, 26 to 35 age group

“[branded packaging] catches my attention because I recognize the logo, Storm King is my brand.”

Male, Chinese, 35 to 46 age group

Set 4



77. Participants perceived the branded packaging as authentic and well designed. The logo and branding were described by most as impressive and made them think that it was export quality (because of the map on the package).

"[Branded packaging] is cooler. I like the map of the world very much. I think it shows that it's in the global market."

Male, Chinese, 26 to 35 age group

"The words, premium hand rolling tobacco [make the branded packaging more appealing]."

Male, Chinese, 36 to 45 age group

"[branded packaging] is a premium, high quality household brand."

Male, Chinese, 36 to 45 age group

"gives you wings when you smoke"

Male, Chinese, 26 to 35 age group

3.4.3 Reactions towards standardised packaging when compared against current branded packaging

Table 9: Branded and standardised packaging for ang hoon

	Set 1	Set 2	Set 3	Set 4
Branded Packaging				
Standardised packaging				

78. When a standardised packaging version of ang hoon was shown to participants, it drew largely negative sentiments. Participants were asked for their feedback of the standardised packaging when compared to current branded packaging in terms of:

- Overall appeal and perceived attractiveness;
- Perceived harm to health; and
- Noticeability of graphic health warning labels.

Overall appeal and perceived attractiveness

Set 1

Branded packaging	Standardised packaging
	

79. Standardised packaging was perceived as fake, an imitation, and less premium than branded packaging. The standardised packaging was also harder to read for some participants.

“[standardised packaging] reflects like imitation. Like it's not an official product”

Male, Chinese, 36 to 45 group

“You wouldn't know whether [standardised packaging] is tobacco or is it poison because the words are small. The name of the brand is small. Nothing else is stated there.”

Male, Chinese, 46 to 60 group

Set 2

Branded packaging	Standardised packaging
	

80. Most participants perceived the standardised packaging to be less visually appealing than the branded packaging as it looked less attractive and appealing.

“[branded packaging], very impressive, attractive.”

Male, Chinese, 18 to 25 age group

“I think this [branded packaging] is more attractive.”

Male, Chinese, 36 to 45 age group

"I will be very depressed with [standardised packaging]. I will quit smoking. I take the last stick and cry there."

Male, Malay, 18 to 25 group

81. A minority of participants described the standardised packaging product as a newer product with “edginess”/ “cool factor” (defiance) than the branded packaging (older smokers would buy for the sake of novelty).

"Let's say that the words and the logo was printed on the [standardised packaging], then I would choose it and smoke it in front of my friends. But without the logo and words, I would choose [the branded packaging]."

Male, Chinese, 36 to 45 group

"For me to go out to the market to see Q [standardised packaging], something like this, is like a novelty that makes me want to try it out."

Male, Chinese, 26 to 35 group

Set 3

Branded packaging	Standardised packaging

82. Standardised packaging was perceived by some participants as confusing and less recognisable than branded packaging because it had no logo or clear description of what was inside the container.

"Then [standardised packaging] is just black and don't know brown. Then just put Storm King. [The packaging] does not tell you anything."

Male, Indian, 46 to 60 group

"[standardised packaging] may contain cigarettes, it may contain tobacco. It could even contain betel nut, but [you can't tell from the packaging]."

Male, Malay, 26 to 35 group

83. Standardised packaging was also perceived as being less desirable than branded packaging for smoking with peers.

"Because [branded packaging] appeals us to buy which means we buy, we will smoke it with our friends or just smoke it by ourselves."

Male, Malay, 18 to 25 group

"[standardised packaging is like] selling you the consequences of smoking instead of selling the cigarettes"

Male, Chinese, 36 to 45 group

84 A small minority also said the packaging made them think it was a new product so they would try because of the novelty.

"I wouldn't mind trying [standardised packaging] also ... Novelty. Like never see in market before, just try."

Male, Chinese, 26 to 35 group

Set 4

Branded packaging	Standardised packaging
	

85. Standardised packaging was perceived by participants as less attractive, less authentic and worse designed than branded packaging.

"After seeing [standardised packaging], looks like some communist products, all look the same."

Male, Chinese, 36 to 45 group

"The black one looks smaller and compact. I feel that [standardised packaging] the design is half done; it is just cut and paste two different colours. I don't really like the design."

Female, Malay, 36 to 45 group

"looks like a packet of tissue"

Male, Malay, 18 to 25 group

"[branded packaging is] attractive. [makes you] smoke more"

Male, Chinese, 18 to 25 group

Perceived harm to health

86. Majority of the participants shared that the dark colour of the packaging, the prominent warnings, and the larger picture made them perceive the contents of the standardised packaging as more harmful to their health than branded packaging. Participants used terms like toxic, dangerous, and depressed when describing the packaging.

"Like that [standardised packaging], seeing it is more toxic. Like it'll damage your health more"

Female, Chinese, 26 to 36 group

"If both are lying on the table at home, then there is a child at home or young teenager who is curious about smoking, if see [branded packaging], I think he's not going to think too much and probably try. [standardised packaging] looks dangerous [so he won't try]."

Male, Chinese, 45 to 60 group

Noticeability of health warning labels

87. All participants commented that the image and text warning were much more noticeable on the standardised packaging. The health warnings took over most of the packaging and they had little choice but to look at the warnings. The warnings and labels made the product look more serious and dangerous.

[Standardised packaging] is very, very serious about the warning ... it is very intense ... Because this one [standardised packaging], the logo really plays a part and once a logo is away, this whole thing looks so serious now, you just want to look at the thing down here [the warning]."

Male, Indian, 36 to 45 group

"Yah, [standardised packaging] very dull. More like a health warning box as the health warning takes up most of the packaging."

Male, Chinese, 36 to 45 group

"[the warnings on standardised packaging] are screaming at you, louder"

Male, Malay, 26 to 35 group

3.5 Beedies

3.5.1 Description of participants

88. Almost all participants for the beedies FGD were male, aged between 18 and 25 or 36 and 45, and had low income. Younger participants were normally in school or just graduated and liked to play sports and hang out with friends. Older participants tended to spend time with their families and play sports.

89. Participants were introduced to beedies by family members or peers. The main motivation for continuing to smoke beedies was to cut down on cost, as smoking cigarettes is much more expensive than smoking beedies. Stronger flavour was identified by some participants as a secondary reason for smoking beedies. Some participants also commented that they smoked beedies because it cut their cravings for cigarettes, in addition to being healthier because of fewer chemicals and using a leaf as wrapping instead of paper.

90. Participants smoked beedies almost exclusively outside, such as in a balcony or a public area. The main reason for not smoking inside was that the smell of beedies is very strong and bothers other people who are not used to the smell. Beedies were mainly smoked to satisfy a tobacco craving at the lowest possible cost.

- Beedies smoked almost exclusively outside

“So normally, when I smoke beedies, I go downstairs and outside. I do not smoke inside the house.”

Male, Indian, 18 to 25 age group

“Outside. Usually, near my house, there’s a place to sit and chain smoke.”

Male, Chinese, 18 to 25 age group

- Beedies smoked mainly to satisfy a tobacco craving at the lowest cost

“[I smoke beedies] because they are the cheapest.”

Male, Chinese, 18 to 25 age group

“Okay, because for me, the way I look at it, it’s the cost factor. Because it’s cheap [to smoke beedies].”

Male, Indian, 26 to 35 age group

3.5.2 Perception of current branded packaging of beedies

91. Participants were shown physical products of beedies before being asked for their feedback on perception of current branded packaging in terms of appeal and attractiveness.

Table 10: Branded packaging for beedies

Branded Package	Set 1	Set 2
		

92. Beedies were purchased from convenience or sundry shops ("mama stores"). The brand preference was based almost exclusively on price, with almost no brand preferences amongst participants. In addition, because of the limited availability of brands (most shops normally carry 1 or 2 brands), participants would just ask for beedies and smoke whatever was given to them by the shop owner. Participants also mentioned that there was no taste difference between brands.

"I think for most of [the brands], the taste is almost the same."

Male, Indian, 18 to 25 age group

"[Selection is] quite limited. My Minimart only sells one brand"

Female, Chinese, 26 to 35 age group

"My shop sells one other brand, I don't know what brand that is. I never ask for the other brand because of the one-dollar difference."

Male, Malay, 18 to 25 age group

Set 1



93. About half of all participants found the branded packaging to be eye catching, cool, and authentic. The presence of a logo helped people recognise the packaging and inspired trust.

"when I started smoking beedies. Always know, pink means beedies. The colour. So if you suddenly want to change the colour and give it in a plain wrapper, I would be hesitant because I would never know if it's the same brand or same taste. So as long as it's pink, for me, I know it's beedies."

Male, Indian, 26 to 35 age group

"[the branded packaging] has a retro feel. Like you know, classic. Very cool."

Then the colour. The logo also."

Male, Chinese, 36 to 45 age group

94. The remaining participants perceived the branded packaging to be unattractive and unappealing due to the colour (pink).

"For [branded packaging], it's like fading, fading kind. This one [standardised packaging] is like, can see the contrast."

Male, Malay, 36 to 45 age group

"Pink looks not so – looks like poor quality stuff to me."

Female, Indian, 18 to 25 age group

Set 2



95. Participants perceived the branded packaging as bright, presentable, neat, and noticeable.

The colour [of the branded packaging is pleasant to the eye], the bright colour and the stripes, which is the pulling factor for me.

Male, Indian, 26 to 35 age group

"Like I said [for branded packaging], the face is there. I think it's the founder. Then of course the colour scheme [is also appealing]. That white, those red words with the yellow and black stripes, I think it looks ... yah, it looks better than [standardised packaging]."

Male, Chinese, 26 to 45 age group

96. The foreign-lettering made some participants think of export quality and made other participants less trusting of the product.

"The Indian wordings [gives me the impression that branded packaging is authentic]."

Male, Indian, 18 to 25 age group

"the [branded packaging] is in some foreign language. Yah, so makes me a bit uncomfortable."

Male, Malay, 26 to 35 age group

"When you say export quality in India, they are subjected to ISO9002 check. Then you can export, if not, cannot come. And when it comes to Singapore, somebody checks it."

Male, Chinese, 36 to 45 age group

"If you see, there's a lot of wording in Indian on [branded packaging]. You know, it's something like from overseas or what [and makes me trust it less]."

Female, Indian, 18 to 25 age group

3.5.3 Reactions towards standardised packaging when compared against current branded packaging

Table 11: Branded and standardised packaging for beedies

	Set 1	Set 2
Branded Packaging		
Standardised packaging		

97. As before, participants were shown various packaging and asked for their feedback of the standardised packaging when compared to current branded packaging in terms of:

- Overall appeal and perceived attractiveness;
- Perceived harm to health; and
- Noticeability of graphic health warning labels.

Overall appeal and perceived attractiveness

Set 1

Branded packaging	Standardised packaging

98. Over half of all participants found branded packaging to be more appealing than standardised packaging. The minority who found standardised packaging to be more appealing than branded packaging, described it as better quality, simple, streamlined, and neat. The large warning message on the standardised packaging product made the look more cohesive than that of the branded packaging product.

“[standardised packaging] looks nicer. When first look, it actually feels like a more expensive product than this pink one [branded packaging].”
Female, Indian, 36 to 45 age group

“Okay, to me, this one looks like yeah, [branded packaging] looks like dirty like that, because maybe because of the colour, yeah. Then it doesn't look appealing to me, so I prefer this [standardised packaging].”
Female, Chinese, 18 to 25 age group

99. The remaining participants perceived standardised packaging as fake and cheap and would prefer the smaller message of branded packaging.

"This one [branded packaging], original product. Compared to this other one, you don't know from where [standardised packaging came from]."
Male, Indian, 18 to 25 age group

"You wouldn't know whether [standardised packaging is] the original that you used to buy or not. Like you know, some people just do their own production and then put into that packaging and start selling. Something like that."

Male, Chinese, 18 to 25 age group

Set 2

Branded packaging	Standardised packaging
	

100. Standardised packaging was perceived as cheaper, fake, and plain when compared to branded packaging. The lack of logo was related to them feeling the product was fake and suspicious.

"The logo, the colour, the wordings [for branded packaging give the impression that this is authentic]."
Male, Chinese, 26 to 35 age group

"More legit. With the logo, it looks more trustable. Rather than this. This [standardised packaging] looks very illegal."

Male, Malay, 18 to 25 age group

101. They also mentioned that a name was not enough, and that they would like to see logos on the products.

"It's not the paper. It's the logo. [Standardised packaging doesn't have a logo], so it looks like not real. Not legit."
Male, Indian, 18 to 25 age group

"Why [standardised packaging] would look fake, one thing for me would be the name. It just put one name. [I need the logo]"

Male, Malay, 18 to 25 age group

Perceived harm to health

102. Most participants shared that the dark colour of the packaging, the prominent warnings, and the larger picture made them perceive the contents of the standardised packaging as more harmful to their health than branded packaging. Participants used terms such as causing ‘heart diseases’, ‘cheaply made’, ‘dangerous’, and ‘scary’.

“[Standardised packaging] looks more harmful to health because it looks [cheaply made].”

Male, Chinese, 36 to 45 age group

“The wording, the font is bigger and makes me think about my health. It is one of the factors that deter me from buying it.”

Male, Indian, 18 to 25 age group

“[Standardised packaging] is scary, makes me think of heart disease.”

Male, Indian, 18 to 25 age group

Noticeability of health warning labels

103. All participants mentioned that the text warnings on the standardised packaging were much more noticeable than in the branded packaging. The health warning was hard to ignore due to its size, was clear, and very visible.

“The warning letters [on standardised packaging] are so big and scary.”

Male, Chinese, 18 to 25 age group

“The health warnings on [standardised packaging] is bigger and more visible than for [branded packaging].”

Male, Malay, 36 to 45 age group

“[standardised packaging] is just like blatantly trying to tell you, you know, this is going to be bad for you”

Male, Indian, 36 to 45 age group

4 Conclusion

104. This study aimed to address the two research objectives— 1) perceptions of current branded non-cigarette tobacco products; and 2) reactions towards standardised packaging when compared against current branded packaging for non-cigarette tobacco products, i.e. cigars, cigarillos, pipe tobacco, anghoon/roll-your own and beedies. Overall, findings showed that standardised packaging garnered negative sentiments from the participants who perceived the packaging to be unappealing and/or unattractive, were more informed about the harm to health and increased the noticeability of graphic health warning labels.

Perception of current branded packaging of non-cigarette tobacco products

105. Branded packaging was generally found to be appealing across product categories because of the colours, logos, and other branding components which worked to instil a sense of familiarity on smokers and induce them to continue using the product, even though branding in itself was, in some cases, not the sole selection criteria which affected what participants choose to smoke.

106. Pipe tobacco smokers found branded packaging to be attractive, authentic, and of premium quality due to the logos and colours used. Ang hoon smokers found branded packaging to be bright, elegant, and eye catching. That said, there were some participants with a preference for the standardised packaging. This was due to the fact that some thought that it was a new novelty product that they would try.

107. Cigar smokers were influenced by the occasion and the perceived status of the cigars they smoked, generally positively correlated to the price of the cigars; brands mattered more depending on who they were smoking with and for what reason (more expensive cigars were smoked at business events or with clients for example). Cigarillo smokers were influenced more by the availability of different flavours. Participants had shared that they chose the cigarillos based on the flavours they wanted to try out and the look of packaging, mainly those that looked elegant, classy and stylish. Beedies smokers were the least impacted by branded packaging out of all product categories, as the price point is the most important criterion when selecting what brand to smoke. This is likely due to beedies smokers having generally lower incomes. Additionally, the limited availability of beedies brands in Singapore forced some smokers to buy whatever brand was available, regardless of the appeal of the packaging. Some of the participants also found the pink branded packaging of the beedies to be a turn off, as the colour was perceived to be unattractive to some of the male participants.

Standardised vs branded packaging: Overall appeal and perceived attractiveness

108. Standardised packaging was largely perceived to be less appealing and less attractive than branded packaging for all product categories. The majority of participants, when given the option, would choose to smoke from the branded packaging because of the colour and the smaller warnings and pictures. The standardised packaging products were, on the whole, perceived as less appealing, low-end, and fake. Participants felt that the dark colours and the generic appearance of the packaging reduced the perceived quality and affected the authenticity of the product itself, especially in the case of cigars.

109. There were some deviations from the overall perception that standardised packaging was less appealing and less attractive than branded packaging. A minority of participants for cigar and pipe tobacco preferred darker colours as they associated darker colours with stronger flavours. In respect of beedies, less than half of the participants for one of the two sets preferred the standardised

packaging, when compared to the pink branded packaging. This could be attributed to the fact that most of the participants for beedies FGDs were male.

Standardised vs branded packaging: Perceived harm to health

110. Most participants perceived the contents of the standardised packaging as more harmful to their health. This applied to all product categories, without any major exceptions. The combination of no branding, Pantone 448C colour, and prominent pictures and warnings all made participants perceive the products as more harmful, reminding them of poison and sickness. Some participants also shared that the colour of the packaging made them think that the products within would be of stronger flavour which would then increase the harm caused to health.

Standardised vs branded packaging: Noticeability of graphic health warning labels

111. The graphic warnings and labels were more noticeable for the standardised packaging across all product categories. The graphic health warnings (on products which had pictures displayed) were made more prominent due to the contrast caused as a result of the darker coloured packaging. The whole packaging was also described as a turn-off due to the prominent warning labels and pictures for those products with pictures.

112. Overall, the findings suggest that standardised packaging would contribute towards:

- Reducing overall appeal and attractiveness of these tobacco products;
- Increasing the perceived harm that these tobacco products pose to health; and
- Increasing the noticeability of graphic health warnings.

These findings are supportive of the broader public health objectives of standardised packaging, which are:

- Reducing the attractiveness of tobacco products;
- Eliminating the effects of tobacco packaging as a form of advertising and promotion;
- Reducing the ability of tobacco packaging to mislead consumers about the harmful effects of smoking (including on the relative difference in harmful effects between products);
- Increasing the noticeability and effectiveness of graphic health warnings; and
- Better informing smokers and non-smokers of the risks associated with tobacco use.

Annex I – Discussion Guide

Key Objectives:

To gain an understanding on perceptions of current branded packaging of non-cigarette tobacco products and obtain reactions towards standardised packaging when compared against current branded packaging, in terms of overall appeal and perceived attractiveness, perceived harm to health, and noticeability of graphic health warning labels.

DISCLAIMER: *The discussion guide would facilitate communication between the moderator & participants by clarifying the flow and the amount of emphasis placed on each topic. It serves as a quick reference tool for the moderator while conducting the research. It is important to keep in mind that the moderator will cover the points in the discussion guide in a natural conversational style and adapt the sequence and actual wording of the probes to the participant's responses. He/she will not read it like a script. In addition, the discussion guide may be subjected to changes derived from the responses in the discussions.*

1. Introduction (10 mins)

- Hi everyone, thank you very much for joining us today for this session.
- Before we begin, I'd like to reassure you: while we will be recording this session, your identities are confidential. All your responses will be aggregated into themes and no personal identifiers will be used.
- Just to be clear, we are not here to discuss or ask you to reveal anything that is personal to you. We just want to get your views on the various tobacco packaging available in the market, particularly for non-cigarette tobacco products such as [product type].
- Since you are the select few participating, all your opinions are very important to us. We all have different backgrounds and experiences, so it is completely normal if you have a different opinion from the people sitting next to you. What is important are your true opinions and feedback.
- Let's start off with some introductions. Please tell us your name and a bit about what you do.

2. Understanding of existing tobacco use and purchase behaviour (30 mins)

- Could you share a bit on the tobacco products that you smoke? Are there any types that you smoke often? Any that you smoke rarely?
- Have your smoking habits changed over time? What led to those changes?
- **Quick check on smoking occasions:** Can you name a typical occasion for your regularly smoked product vs. your occasionally smoked product? Where do you generally smoke it? (*Quick check for location – home or out of home, environment, company, associated products like food/drink etc.)* [tell the participants that regular is referring to using products once or twice a week whereas occasionally is less than twice a week]
- **We would like to talk more about** [regular product type]: How long have you been using [product type]?
- If you think back to when you first started, do you remember some of the reasons why you started? (*Probes: Social/peer influence, curiosity, easy access, emotional reasons*)
- What attracted you to try [product type]? (*Moderator to note if packaging played a part in influencing purchase/use behaviour, and check on how*)
- What's the reason you're still using [product type] now?

- How often do you use it? How many [product type] and how often? Earlier you shared with us a bit on your typical occasion... can you elaborate further... Where do you normally smoke/use [product type]? (*If needed, prompt for: at home, in lounges, in bars, etc.*)
- Who do you usually use [product type] with?
- How do you normally purchase [product type] and where from?
 - *If needed, prompt for: Tobacconists, cigar bars, lounges etc./ In person, over the internet?*
- Can you tell us about how the product is packaged when you purchase them?
 - **Check for cigars:** Do you purchase it as a box or single purchases? Why so, could you share more on the reasons? Are the single sale cigars ever purchase sans the packaging? (*i.e. from humidor to hand immediately?*)
- What do you like about [product type] compared to other tobacco products?
- *Probe If needed:*
 - Taste/ flavour/ strength
 - Quality
 - Perceived Harm (e.g. less harmful)
 - Convenience (e.g. no need preparation)
 - Widely available
 - Image/status (e.g. cool, high class, influence from movies, etc.)
 - Packaging (e.g. has a nice design/colour)
 - Brand (e.g. trusted brand)

3. Relationships with Brands (30 mins)

Now we'd like to find out more about the different brands of [product type] ...

- What brands of [product type] do you smoke?
- What do you like about this brand over other brands?
- *Probe and note how participants prioritise the attributes:*
 - Taste/ flavour/ strength
 - Quality
 - Perceived harm
 - Image/status (e.g. cool, high class)
 - Packaging (e.g. has a nice design/colour)
 - Brand (e.g. trusted brand)
- Have you previously tried other brands of [product type]? Are there any brands you would consider trying? What makes you interested in them?
 - What about some brands that you would not consider trying? What are the reasons?
 - What makes you not consider switching to other brands (i.e. what keeps you loyal to your current brand?)
- What other brands of [product type] are you aware of?
 - In your opinion, who smokes these brands? Can you describe to me their typical profile? What do you think their age would be? What about income status, attitude & personality, etc?
- Where do you think these people would smoke this? With whom?
- (*Moderator to get a good understanding of how smokers distinguish between different brands of [product type] – whether it is taste or other attributes. Also, moderator to note differences in the descriptors of the smokers of different brands*)

- [For cigars] What do you feel is the purpose of the band on cigars? Is it to only show the brand? Do you leave it on or take it off? Why?

4. Testing perceptions towards branded vs. standardised tobacco packaging (45 mins)

Show participants the branded and plain packs for relevant tobacco product [showcard for cigars, cigarillos, ang hoon/roll-your-own, pipe tobacco; mock ups for beedies] at the same time, pay attention to non-verbal reactions of participants. (Stimulus format could vary depending on availability of mock-ups and number of variations for certain product categories. For example for cigars, there are; 1) Cigar bands; 2) cigar tubes; 3) cigar boxes; 4) cigar bags)

Stimulus to be coded as SP (Standardised packaging) and BP (Branded packaging)

- Can you all note down the first thing you noticed on the post-it note in front of you.
- Thank you, now let's discuss more on that...what caught your attention first? Which pack stood out more? Why so? (*Probes: health warning/image, brand name, packaging colour/design*)
- What according to you all is the main difference between the 2 packs?

On appeal of packaging:

- Okay now back to the post-it notes – can you write down the code of the pack that you are most likely to buy, in a situation where you found both on the shelf? And also give us your reason, on the same post-it
- Okay now let us discuss: so, which pack is the most appealing for you and why?
- Check for the following
 - Colour, design, other attributes
 - Authenticity (due to branding or logo)
 - Smaller health warning image
 - Other reasons related to product perceptions
- Check for the less appealing pack:
 - Looks ugly/ cheap/ inferior because it has not branding or logo
 - Packaging has a larger health warning image
 - Product may be fake/ counterfeit
 - Other reasons related to product perceptions
- Okay, if you had to tell us the product that would make you want to consider smoking it, which would it be and why? And why not the other? (*Probe for reasons*)
- Okay, suppose you were smoking outside, let's say with your peers, which pack would you prefer to be seen with and why? And why not the other? (*Probe for reasons*)

[Note, if participants react similarly to both packs, strongly probe them on which packaging they find more appealing/ unappealing and why].

On quality of tobacco products

- Okay, next, write down on the post-it which pack looks more expensive to you.
- Now can we discuss? Which do you think looked more expensive? What are the reasons? Why do you say so? What does it say about the product itself?
- Probe for
 - Quality

- Taste
- Others (Health?)

[Note, if participants react similarly to both packs, strongly probe them on which packaging they find more expensive/higher quality and why].

[For participants who have not tried a certain brand, ask whether they would expect it to contain better tasting product]

On perception of harmful to health?

- Okay, next, write down on the post-it which between the two packaging, do you feel is the more harmful to your health and why?

[Note, participants may state that both are equally harmful but probe them on which they think is more harmful in comparison and check if packaging has any influence on their decision].

On ease of quitting

- If I asked you which of these packaging would prompt you to consider quitting/reducing, which would it be, you can first note your answer down and then discuss.
 - Which packaging makes you think more about quitting tobacco use?

Which packaging makes you think least about quitting tobacco use? [Note, participants may state that both are equally hard to give up but probe them on which they think is harder to give up in comparison].

On Graphic Health Warning labels

- Which of the 2 labels made you think about health more? Note down your answers.
- Now let us discuss: What do you think when you see these health warning labels? How do they make you feel?
- Which one of the two would you be more likely to read?
- Which one stands out more and why do you think that is?
- Which one stands out less and why do you think that is?
- For each, what do you notice first when looking at it – the image or the statement or both?
- What do you feel about the size of the health messages? (Probe only if not covered earlier)

THANK & CLOSE GROUP

Annex II – Recruitment screener

Specifications

Participant's Full Name _____
Address _____ Email address _____
Telephone Number _____ Interview Date: _____
Interviewer's name _____

Sample Specifications

Methodology	16* FGD or until saturation point for each product type, to switch to IDIs if we are not able to recruit sufficiently for all three sessions.																														
Number of Participants	Recruit 8 for 6-8 to show for each FGD																														
Schedule	<table border="1"> <thead> <tr> <th>Group</th> <th>Date/Time <i>(Participants would be incentivised additionally for day time groups)</i></th> <th>Profile</th> <th>Medium</th> </tr> </thead> <tbody> <tr> <td>1-3</td> <td>19 Mar</td> <td>Cigar smokers</td> <td>English</td> </tr> <tr> <td>4-5*</td> <td>20 Mar</td> <td>Cigarillo smokers (Premium)</td> <td>English</td> </tr> <tr> <td>6-7*</td> <td>20 Mar</td> <td>Cigarillo smokers (Economy)</td> <td>English</td> </tr> <tr> <td>8-10</td> <td>21 Mar</td> <td>Anghoon/Roll-Your-Own smokers</td> <td>English</td> </tr> <tr> <td>11-13</td> <td>22 Mar</td> <td>Pipe tobacco smokers</td> <td>English</td> </tr> <tr> <td>14-16</td> <td>23 Mar</td> <td>Bidis/Beedies smokers</td> <td>English</td> </tr> </tbody> </table> <p>*Number and composition of Premium/ Economy FGDs to be decided based on recruitment progress</p>			Group	Date/Time <i>(Participants would be incentivised additionally for day time groups)</i>	Profile	Medium	1-3	19 Mar	Cigar smokers	English	4-5*	20 Mar	Cigarillo smokers (Premium)	English	6-7*	20 Mar	Cigarillo smokers (Economy)	English	8-10	21 Mar	Anghoon/Roll-Your-Own smokers	English	11-13	22 Mar	Pipe tobacco smokers	English	14-16	23 Mar	Bidis/Beedies smokers	English
Group	Date/Time <i>(Participants would be incentivised additionally for day time groups)</i>	Profile	Medium																												
1-3	19 Mar	Cigar smokers	English																												
4-5*	20 Mar	Cigarillo smokers (Premium)	English																												
6-7*	20 Mar	Cigarillo smokers (Economy)	English																												
8-10	21 Mar	Anghoon/Roll-Your-Own smokers	English																												
11-13	22 Mar	Pipe tobacco smokers	English																												
14-16	23 Mar	Bidis/Beedies smokers	English																												
Target Participants:	<p>General Profile (within each group):</p> <ul style="list-style-type: none"> • Singaporean/PR • Mix of gender • Mix of age groups • Mix of ethnic composition (CMIO) 																														

Good morning/afternoon/evening, my name is _____ and I am calling from Blackbox Research. We are an independent market research company commissioned by the Health Promotion Board. The Health Promotion Board is currently working on a study to understand more about public views on tobacco packaging. Please be assured that this has nothing to do with any kind of sales or investment. All information gathered from you will be strictly confidential and only used for research purposes. We would be grateful if you could answer a few questions.

For participants recruited via recruiter's network

XXXX shared with us your contact as XXXX has shared that you have indicated your interest to participate in focus group discussions or a one-to-one interview. We are going to be organising a focus group discussion on [date] at [location of research company] to talk about regular users' views towards tobacco packaging.

For participants recruited on-site

On [Date of recruitment] at [Venue of recruitment] you were approached by one of our recruiters and agreed to be contacted to participate in a focus group discussion or a one-to-one interview. We are going to be organising a focus group discussion on [date] at [location of research company] to talk about regular users' views towards tobacco packaging.

We would like to invite you to join us in the discussion on [date at time] to share about your views. Your participation is voluntary, and the focus group discussion should take about 2 to 2.5 hours. Just to let you know, we need a minimum number of participants before a focus group discussion can take place. If we are not able to recruit sufficient participants, the session for focus group will be cancelled and a one-to-one interview will be scheduled instead at a later date.

Section A – General Screener

1		(SA)	
Would you be interested in participating?	Yes	1	Continue
	No	2	Terminate

2		(SA)	
Gender [Record]	Male	1	Try for a mix
	Female	2	

3		(SA)	
What is your nationality?	Singaporean	1	Continue
	Permanent Resident	2	
	Others: _____	3	Terminate

4	Do you or your immediate family member(s) work in any of the following industries?		(MA)	
		Mass Media (Newspapers, TV, Radio, Magazines, etc.)	1	Terminate
		Market Research Agency or other research	2	
		Public Relations/Promotions Agency	3	
		Creative/Advertising Agency	4	
		Tobacco Industry (Manufacturers, retailers, marketing and sale of tobacco)	5	
		Healthcare Industry (Doctors, nurses, pharmacies)	6	
	Others			Continue

5	Have you attended ANY research study, including Focus Group Discussion, In-Depth Interview, face-to-face surveys, phone interviews, etc. in the past 6 months? What was the topic of this discussion/interview?		(SA)	
		Yes, topic related to tobacco	1	Terminate
		Yes, topic not related to tobacco	2	Continue
		No	3	

6	Record Age		(SA)	
	What is your age?	Younger than 18	1	Terminate
		18 to 25 years old	2	Try for a mix
		26 to 35 years old	3	
		36 to 45 years old	4	
		46 to 60 years old	5	
		Over 60 years old	6	

7	May I verify that you are...?		(SA)	
		Chinese	1	Try for a mix
		Malay	2	
		Indian	3	
		Eurasian	4	
		Others: _____	5	

8a	Do you use any of the following tobacco products currently?		(MA)	
		Cigars	1	Continue to Q8b
		Cigarillos	2	
		Ang Hoon/Roll-your-own	3	
		Pipe tobacco	4	
		Bidis/Beedies	5	
	I don't use any of the above tobacco products	6	Terminate	

8b	Which would you say is your most often used tobacco product?		(MA)*	
		Cigars	1	Continue to Q10a
		Cigarillos	2	Continue to Q9
		Ang Hoon/Roll-your-own	3	Continue to Q10c
		Pipe tobacco	4	Continue to Q10d
		Bidis/Beedies	5	Continue to Q10e
	Others	6	Terminate	

9	<i>Only applicable for those who chose option 2 in Q8b</i>		(SA)	
	How much does it cost for 20 sticks of your usual brand of cigarillos?	\$80 - \$170 (Premium)	1	Recruit appropriately for Premium/Economy segments, Continue to 10b
		\$15 - \$30 (Economy)	2	

10a	<i>Only applicable for those who chose option 1 in Q8b</i>		(SA)	
	How often do you smoke Cigars?	More than once a week	1	Continue for FGD 1-3
		Every two weeks	2	KIV for stage 2
		Monthly	3	KIV for stage 3
		I seldom smoke Cigars	4	Terminate

10b	<i>Only applicable for those who chose option 2 in Q8b</i>		(SA)	
	How often do you smoke Cigarillos?	More than once a week	1	Continue for FGD 4-7
		Every two weeks	2	KIV for stage 2
		Monthly	3	KIV for stage 3
		I seldom smoke Cigarillos	4	Terminate
10c	<i>Only applicable for those who chose option 3 in Q8b</i>		(SA)	
	How often do you smoke Ang Hoon/Roll-Your-Own?	More than once a week	1	Continue for FGD 8-10
		Every two weeks	2	KIV for stage 2
		Monthly	3	KIV for stage 3
		I seldom smoke Ang Hoon/Roll-Your-Own	4	Terminate
10d	<i>Only applicable for those who chose option 4 in Q8b</i>		(SA)	
	How often do you smoke Pipe Tobacco?	More than once a week	1	Continue for FGD 11-13
		Every two weeks	2	KIV for stage 2
		Monthly	3	KIV for stage 3
		I seldom smoke Pipe Tobacco	4	Terminate
10e	<i>Only applicable for those who chose option 5 in Q8b</i>		(SA)	
	How often do you smoke Bidis/Beedies?	More than once a week	1	Continue for FGD 14-16
		Every two weeks	2	KIV for stage 2
		Monthly	3	KIV for stage 3
		I seldom smoke Bidis/Beedies	4	Terminate

***Notes for recruiter: In case of multiple usage of products, focus on “most-often” smoked.**

If multiple products have similar usage, prioritise based on recruitment requirement per FGD

I will be sending you a confirmation email in the next couple of days to provide you with details about the discussion including the date and time and a map to [location]. The email will also give a phone number you can call if you have any questions about the discussion. [Get email address:
_____]

[Instructions if no email address] Provide details about the discussion over the phone and get participant to note down the phone number to call if they have any questions about the discussion.

[For ALL] In the meantime, please note down the following contact details:

[Contact details of research company]

The study has been reviewed by the NHG Domain Specific Review Board (the central ethics committee) for ethics approval.

If you want an independent opinion to discuss problems and questions, obtain information and offer inputs on your rights as a research subject, you may contact the NHG Domain Specific Review Board Secretariat at 6471-3266. You can also find more information about the NHG Domain Specific Review Board at www.research.nhg.com.sg.

Thanks so much for agreeing to participate. You will be suitably reimbursed for contributing your time to this study with _(incentive)_ for your time spent and valuable feedback.

Do you have any (more) questions before we hang up? [Answer any questions they might have]

Okay. I'll be sending you the confirmation email and I look forward to meeting you at [time] on the [date]!

Thank you in advance for your support and participation.

Annex III – Stimuli Pictures

Cigars

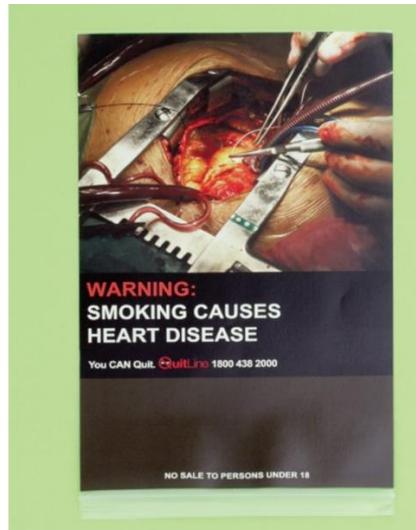
Set 1



Set 2



Set 3



Set 4



Set 5



Cigarillos

Set 1



Set 2

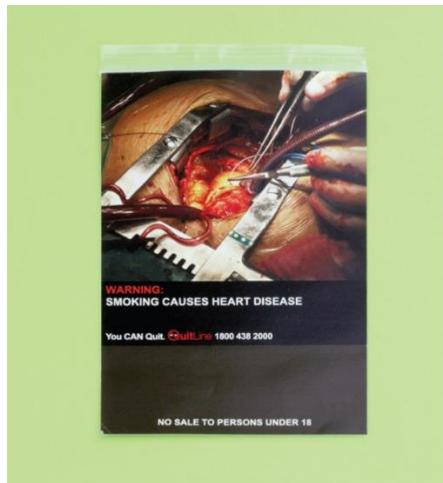


Pipe tobacco

Set 1



Set 2

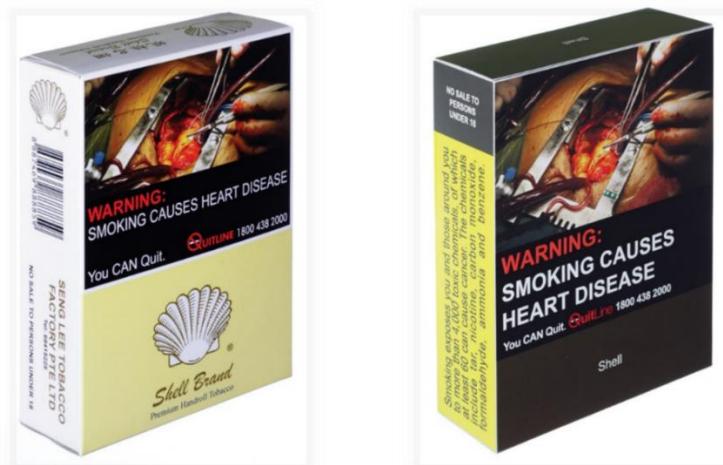


Ang hoon

Set 1



Set 2



Set 3

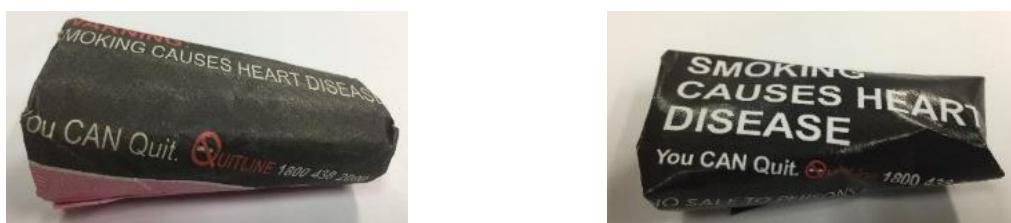


Set 4



Beedies

Set 1



Set 2

