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# Market Research to Determine Impact of Plain Packaging on other tobacco products

## Report

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## 1 EXECUTIVE SUMMARY

### 1.1 Background, Objectives and Methodology

The National Partnership Agreement on Preventive Health has set the aim of reducing the proportion of Australians who smoke daily to 10% by 2018. Based on recommendations by the Preventative Health Taskforce, the Australian Government announced on 29 April 2010 that it would introduce legislation to ensure all cigarettes will be sold in plain packaging by 1 July 2012. Australia will be the first country in the world to mandate plain packaging.

The objectives of plain packaging as announced by the Australian Government are to:

- reduce the attractiveness and appeal of tobacco products to consumers, particularly young people;
- reduce the ability of the tobacco product to mislead consumers about the harms of smoking; and
- increase the noticeability and effectiveness of mandated health warnings.

The legislation 'will restrict or prohibit tobacco industry logos, brand imagery, colours and promotional text, other than brand and product names in a standard colour, position, font style and size'. Following market research for cigarette packaging the Department of Health and Ageing (the Department) commissioned research on the impact of plain packaging in regards to tobacco products other than cigarettes. This included premium cigars, roll your own tobacco (RYO) and cigarillos / little cigars.

The primary aims of this round of market-testing were focused on evaluating the performance of plain packaging designs for RYO tobacco, cigarillos/little cigars and premium cigars (single cigars) on the measures that were tested in earlier plain packaging research. The key measures tested were overall appeal, quality of tobacco, ease of quitting, perceived harm to health and noticeability of graphic health warning. Based on the initial hypotheses of the research and results from earlier plain packaging testing, the research sought to test the hypotheses that a plain packaging pack would:

- have lower appeal;
- have lower perceived quality of tobacco;
- be perceived as harder to quit; and
- have higher perceived harm to health.

Although no previous testing had been conducted comparing the noticeability of a 75% graphic health warning on branded packs and plain packaging packs, initial hypotheses were that a plain packaging pack could result in higher noticeability of graphic health warning.

A predominantly quantitative methodology was used for cigarillo / little cigar and RYO smokers. For RYO smokers, this consisted of an online survey with n=209 RYO smokers across Australia. For cigarillo / little cigar smokers, a self complete quantitative questionnaire was administered through five qualitative discussion groups with n=30 cigarillo / little cigar smokers. In addition, two qualitative discussion groups were conducted with RYO smokers.

The methodology for premium cigar smokers was qualitative due to the difficulties in recruiting large numbers of this group in Australia. Eight qualitative in-depth face-to-face interviews were held with smokers of premium cigars. The research program ran from 27 July to 1 August 2011. The qualitative discussions were held in metropolitan areas of New South Wales, Victoria and Queensland.

Consistent with previous rounds of research the plain pack mock up products used in the research were branded as 'Mayfair'. This brand name was chosen as there is currently no other similarly named tobacco product in the Australian market and there would be no latent association with the brand name among the research audiences.

## 1.2 Roll Your Own Smokers

### Attitudes and Behaviours to Tobacco Products

The qualitative group discussions with RYO smokers demonstrated that they were a more homogenous group in their attitudes and behaviour than both cigar and cigarillo smokers. RYO tobacco was chosen by these respondents over pre-manufactured cigarettes for a number of reasons, primarily that it:

- tastes better than pre-manufactured cigarettes;
- costs less than pre-manufactured cigarettes;
- affords some 'distinction' from pre-manufactured cigarettes; and
- lasts longer than pre-manufactured cigarettes.

RYO smokers tended to have a relationship with a particular brand and held strong associations with others, both positive and negative. They tended to have tried a number of brands and so have some knowledge of brands they preferred or disliked.

### Reactions to Plain Packaging of Roll Your Own

The results from the quantitative pack evaluation comparison show that a plain packaging RYO pack design were in line with the hypotheses for overall appeal, quality perceptions, ease of quitting and highest perceived harm to health. Overall, the Mayfair plain pack was seen to be the least attractive than current branded packs. It was seen to be:

- the least appealing pack overall;
- to contain the lowest quality cigarettes;



- be the pack which contained cigarettes that would be the hardest to quit;<sup>1</sup> and
- the pack which was seen to contain the second most harmful cigarettes, after White Ox.

#### *Appeal, quality and harm to health*

In the qualitative research respondents universally found that the plain pack design, including colour, font and layout, was unappealing and unattractive. The plain pack colour gives off the impression of a low quality and harmful product, and there are no pre-existing brand associations which smokers can attribute to it which would distract them from the graphic health warning. For RYO smokers low quality was consistently equated with increased harm.

#### *Ease of quitting*

The perception from respondents was that the plain pack would be harder to quit if taken up than the majority of the other brands. This was due to their feeling the product contained a strong tobacco which would only be smoked by highly 'addicted' smokers. As such they felt that those who did smoke it would find it harder to give up. This perception contributed to the low appeal of the plain pack for respondents.

While the White Ox pack was seen to be the second least appealing pack, contain the second lowest quality cigarettes and be the most harmful to health, it was also seen to be the easiest to quit. This was in contrast to previous studies where those packs deemed less appealing, to have lower quality cigarettes and be more harmful to health were seen to be harder to quit. This difference appears to be a result of differing interpretations of the question and the qualitative discussions found that some respondents would answer this question thinking about which brand is easiest to quit as the one they felt least palatable and would least want to smoke themselves. Others considered the question in regards to which brand they felt was the most 'addictive' and therefore hardest to quit.

#### *Noticeability of health warnings*

In the quantitative research the noticeability of the health warning did not seem to differ significantly across pack designs (including plain packaging) when a 75% health warning coverage is used. At 75% health warning coverage, there was also no evidence that higher contrast between the background pack colour and health warning would result in higher noticeability of the health warning. Qualitatively the findings indicate that the size of the graphic health warning at 75% of the front of pack is so large as to be unavoidable. As such respondents found it hard to differentiate against which pack background or brand they felt the graphic health warning stood out the most. Given the size of the graphic health warning they felt it stood out similarly across the different pack backgrounds.

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<sup>1</sup> The qualitative discussions made clear that the way in which RYO smokers interpreted the question was the determinate of how they answered the question. Many thought the plain pack to contain low quality and high strength cigarettes which they felt would only be smoked by highly addicted smokers who would therefore find them the hardest to quit. Therefore they felt this pack would be hardest to quit as they answered the question from the point of view of a plain pack smoker.



Overall, the qualitative findings demonstrated that the plain RYO pack will strongly communicate to smokers the product contained within is harmful to health and undesirable.

### 1.3 Cigarillo Smokers

#### Attitudes and Behaviours to Tobacco Products

Two distinct types of cigarillos / little cigar smokers were identified. The first of these were those who also smoked premium cigars as well as cigarillos / little cigars, rather than cigarettes or other tobacco products. Cigarillos / little cigars were chosen by these respondents over cigars as a means of enjoying the taste of cigar smoke, while not being as expensive or taking as long to smoke. These cigarillo / little cigar smokers would often enjoy a full size premium cigar with others in a social setting. This group tended to be very similar in attitudes and behaviours to more frequent premium cigar smokers (discussed later in this report).

The other type of cigarillo / little cigar smokers were typically also cigarette smokers or had been so in the relatively recent past. This group claimed to smoke cigarillos for a number of reasons:

- they taste better than cigarettes;
- felt they smoked fewer cigarillos than they would smoke cigarettes, therefore felt to be not as bad for their health;
- the act of smoking a cigarillo held an element of occasion;
- for a small few it was associated with a sense of status, with it being perceived as more refined / sophisticated than smoking cigarettes.

Cigarillo smokers in this study tended to have established brand relationships, only smoking specific brands. That said, while there was some sense that some brands were of higher quality than others, cigarillo smokers did not generally have a large amount of previous knowledge of brands other than their preferred brand.

#### Reactions to Plain Packaging of Cigarillos / little Cigars

The quantitative results indicate the cigarillo packs which were seen to be less appealing were also seen to contain lower quality cigarillos and be more harmful to health. There were mixed responses in terms of which packs were harder or easier to quit. The larger packs (square boxes) were seen to have the most noticeable health warnings whilst the narrower rectangular packs had the least noticeable health warnings.

In the quantitative testing, the plain packaged tin was seen to be:

- the least appealing pack;
- the pack containing the lowest quality cigarillos; and
- the third most harmful to health out of six packs tested, after Café Crème and Wee Willem, the brands seen to be second and third least appealing.



On the measure of ease of quitting, there was no obvious consistency in how the different packs were ranked on perceived ease of quitting and the Mayfair pack was seen to contain cigarillos that were easiest to quit.<sup>2</sup> This result appeared to be influenced by varied interpretation of the question, as seen for RYO smokers.

By nature of being a larger pack, hence a larger health warning relative to rectangular packs, the Mayfair plain package pack (square) was also seen to have a more noticeable health warning than the rectangular shape packs and was considered to be the pack with the third most noticeable health warning of the six packs tested.

The qualitative discussions made clear that cigarillo smokers have strong associations with particular brands, both positive and negative. They consistently found the Mayfair plain pack to be unappealing and unattractive which was strongly tied to perceptions of low quality. It was felt the plain packaging has a significant effect in lowering the appeal of cigarillo smoking.

#### 1.4 Premium Cigar Smokers

##### Attitudes and Behaviours to Tobacco Products

Smokers of premium cigars differed considerably in their attitude to cigars compared to smokers of other tobacco products. Smoking cigars is felt to be a choice rather than an addiction or habit. It is seen as a luxury and occurs most often in conjunction with a specific activity, for a specific occasion, or in a specific location.

The research found two very different types of cigar smokers. The first of these, more frequent cigar smokers, were often extremely knowledgeable about the different types of cigars, and regularly smoked different brands of cigars for enjoyment and as a learning activity. Preference for a specific brand was driven by a combination of factors such as best value for money, the amount of time available to enjoy the cigar, the company and the perceived quality of the tobacco used in the cigar. The brand name and variant of the cigar provides an indication of this type of product information. The more frequent cigar smokers interviewed did not smoke any other tobacco product.

The less frequent smokers of premium cigars in the study tended to smoke a premium cigar about twice a month on average (smokers who smoked cigars less frequently than this were excluded from participating in the study). Some of the less frequent cigar smokers were smokers of other tobacco products, including cigarettes. While they felt driven by habit to smoke cigarettes, cigar smoking was seen as an occasional pleasure. Their cigar smoking was generally associated with a specific activity, such as a card game, or a specific occasion such as a success at work. These cigar smokers were less knowledgeable about premium cigars and how to determine quality so were more influenced by brand names. They were more likely to assume quality based on origin, rather than have more detailed understanding of difference that the more frequent cigar smokers had.

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<sup>2</sup> The qualitative discussions made clear that similarly to RYO smokers the way in which cigarillo / little cigar smokers interpreted the question was the determinate of how they answered the question. The Mayfair was seen as the easiest to quit as it was the pack that participants felt was least palatable and that they would least want to smoke themselves.

All smokers of premium cigars claimed to not inhale the tobacco smoke. Inhaling smoke from a premium cigar, or any cigar type product, was perceived as something only the naïve or inexperienced would do. The pleasure of the cigar was felt to be in tasting the smoke.

### Reactions to Plain Packaging of Premium Cigars

More so than the more frequent smokers, the less frequent smokers take particular interest in the branding and packaging of cigar tubes. Their smoking is largely driven by social occasions within which the 'presenting' or giving of cigars can play a major role in the perceived appeal. The branding also has a strong effect on their perceptions of quality in regards to their purchases and as such the plain packaged tube has a marked effect on the perceived appeal of cigar smoking. It significantly deglamourises the event and reduces their appeal as gifts or when presenting them to friends. The lack of brand association for the plain packaged products, in contrast with existing products, leaves them nothing 'to go on' bar the colour of the tube. This was described as 'muddy', 'tar like' and highly unappealing. This lack of appeal is strongly tied to a perception of low quality.

For more frequent and connoisseur cigar smokers the tubes did not have the same impact in terms of lowering appeal or attractiveness of cigar smoking. This is because they judge the quality of a cigar on criteria other than the branding, which can include the type of tobacco, the roll, the age and particular country and region of origin. The brand name is taken as a sign of authenticity or legitimacy of the product. This information is most often contained on the cigar band. As such a plain pack band (which did not display any information) obscuring the branded band has a more significant impact as it deprives them of the product information which they use to inform their purchases. This lowers the desirability of any given particular cigar as they are unable to verify the product they are receiving as opposed to lowering the overall appeal of cigar smoking which remains high.

For both types of cigar smoker there was little perceived need to 'quit' smoking. They did not see themselves as 'addicted' to their habit in the same way they perceived cigarette smokers to be 'addicted'. As there was no perceived 'addiction' there was also no need to quit. Both types of cigar smoker also had low perceptions of any health risks connected with their cigar smoking, which further contributed to the lack of perceived need to quit.<sup>3</sup> As most did not smoke daily but rather weekly or once every two weeks they also did not feel their frequency of smoking warranted concern about health implications or a need to quit.

Although there was little perceived need to quit, less frequent smokers felt that if cigar smoking is made to be less appealing, and products to be seen as lower quality, it would be easier to quit. As much of their cigar smoking was occasion based and current branding played an important role in the purchasing and appeal of cigar smoking at those occasions, the plain packaging did increase their perceived ease of quitting. However, for frequent smokers the plain packaging had minimal effect on their perceptions of the ease of quitting as it did little to lower the overall appeal of cigar smoking.

In relation to cigar packaging, the impact of plain packaging on noticeability of health warnings was not tested in this research.

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<sup>3</sup> This is talked about in detail in the report on graphic health warnings.

## 1.5 Conclusions

The clear evidence emerging from both the quantitative and the qualitative findings points to the plain packaging colour and design, across RYO, cigarillos and premium cigars, as:

- minimising appeal and perceptions of quality; and
- maximising perceptions of harm to health.

There were varying impacts of plain packaging on perceptions of 'ease of quitting'. Products in plain packaging can be viewed as being 'harder to quit' if seen to be a stronger more addictive product (if one is already smoking them) or as 'easier to quit' if seen to be so unappealing that one would not consider smoking them. There were also differences across the product and audience range. For example, whereas less frequent premium cigar smokers felt the plain packaging significantly lowers the appeal and suitability for specific occasions (such as gift giving) and were thus more likely to quit, frequent premium cigar smokers felt largely unaffected by plain packaging and therefore unlikely to quit because of it.

In terms of ease of quitting for RYO and cigarillo smokers, although there was no consistency in the plain pack performance quantitatively ('hardest to quit' for RYO and 'easiest' to quit' for cigarillo smokers) the qualitative research suggests that these 'extremes' are driven by low desirability of the pack.

The only area where the plain pack did not perform consistently better than other packs was on the impact of noticeability of the health warnings for RYO and cigarillo / little cigar smokers. When the graphic health warning has 75% pack coverage, plain packaging had limited additional impact on the noticeability of health warnings for RYO and cigarillo / little cigars. The findings indicate that once a 75% coverage is used the health warning was very noticeable regardless of whether the pack was branded or not. The impact of plain packaging on noticeability of health warnings for cigars was not tested in this research. However, given the strong effect plain packaging had on all other measures this is not to say that it should not be implemented or that this would reduce the effect on those other measures.

As with other plain packaging research, existing associations had a significant impact on how smokers viewed particular brands. In particular, packaging is a significant means of informing these perceptions. This is the case for RYO, cigarillo / little cigar and less frequent premium cigar smokers. For more frequent cigar smokers, rather than the packaging it is the cigar bands which act as markers of legitimacy and carry essential product information, in particular for single sale loose cigars. As such, introduction of the plain pack band was felt likely to lower the ability of consumers to purchase products they felt informed about and felt confident were legitimate. This suggests a need to make product information available by some other means at and after point of sale.

Overall, the quantitative and qualitative results indicate that in minimising the existing brand associations by introducing plain packaging measures, the proposed Mayfair plain pack performs strongly on the key measures identified by the Department across the products under research, in particular in reducing overall appeal and perceived quality of tobacco, and increasing perceived harm to health.

## 2 BACKGROUND

### 2.1 Previous Research

The Department of Health and Ageing is planning on revising or updating the current graphic health warnings appearing on tobacco product packaging with the intent that these changes would be implemented alongside changes addressed in the Plain Packaging legislation in July 2012.

A series of seven research studies have already been conducted to determine effective plain packaging of manufactured cigarettes. This previous market research was to assess the potential plain packaging design elements to determine which plain packaging options were optimal to achieve the policy objectives. More specifically, the research sought to identify the optimal combination of plain packaging design elements in terms of background plain packaging colours, font style and size for brand name and graphic health warning design (size and layout). In summary, the research sought to identify one plain packaging design (colour, font type, font size) that would minimise appeal and attractiveness, whilst maximising perceived harm and the noticeability of the graphic health warnings. The outcome of these seven studies was a plain packaging design for all tobacco products that would include:

- drab dark brown colour for plain packaging; and
- 'Lucida sans' font style with a maximum font size of 14pt for brand names.

Other design elements of the packaging will vary depending on the type of tobacco product due to various packaging sizes and formats.

### 2.2 The Current Need for Research

This phase of the research is to measure consumer perception and reaction to various types of tobacco product plain packaging, other than cigarette packaging, carrying the proposed new health warnings. The types of packaging that will be tested will include packaging for a range of tobacco products. This research will be qualitative and quantitative in nature. The findings will be utilised to determine the size, placement and content of the graphic health warnings to be considered for use on tobacco product packaging other than cigarettes. In addition to this, the research will also identify the optimal plain packaging design on tobacco product packaging other than cigarettes, specifically roll your own (RYO) tobacco, cigarillos/little cigars and premium cigars.

This report specifically focuses on the findings from the plain packaging design research. Findings relating to graphic health warnings are reported separately in another document.



### 3 RESEARCH OBJECTIVES

#### 3.1 Policy Objectives

The plain packaging legislation 'will restrict or prohibit tobacco industry logos, brand imagery, colours and promotional text, other than brand and product names in a standard colour, position, font style and size'. The objectives of plain packaging as announced by the Australian Government are to:

- reduce the attractiveness and appeal of tobacco products to consumers, particularly young people;
- reduce the ability of the tobacco products to mislead consumers about the harms of smoking; and
- increase the noticeability and effectiveness of mandated health warnings.

#### 3.2 Research Objectives for Plain Packaging of Other Tobacco Products

The primary aims of this round of market-testing were to determine the impact of plain packaging in comparison to existing packaging. Specifically, the research focused on evaluating the performance of plain packaging designs for RYO tobacco, cigarillos/little cigars and premium cigars (single cigars) on the measures that were tested in earlier plain packaging research. The key measures tested were overall appeal, quality of tobacco, ease of quitting, perceived harm to health and noticeability of the graphic health warning. Based on the initial hypotheses of the research and results from earlier plain packaging testing, the research sought to test the hypotheses that a plain packaging pack would:

- have lower appeal;
- have lower perceived quality of tobacco;
- be perceived as harder to quit; and
- have higher perceived harm to health.

Although no previous testing had been conducted comparing the noticeability of a 75% graphic health warning on branded packs and plain packaging packs, initial hypotheses were that a plain packaging pack could result in higher noticeability of the graphic health warning.



## 4 RESEARCH METHODOLOGY

### 4.1 Overview

There were three products of interest in this research – RYO tobacco, cigarillos and premium cigars. Different methodologies were used to address each product. The research methodology used was primarily quantitative for the RYO and cigarillo products with qualitative findings drawn from a short discussion on plain packaging conducted during qualitative group discussions for graphic health warning research.<sup>4</sup> The methodology used for the premium cigar smokers was predominantly qualitative due to the low incidence of these smokers. All research was conducted between 27 July 2011 and 1 August 2011.

Further details of the methodologies used for each product are as follows:

**RYO** - comprised an online survey of n=209 RYO smokers plus a short discussion in 2 qualitative group discussions among RYO smokers;

**Cigarillo/little cigars** – n=30 self completion surveys conducted among cigarillo smokers administered in 5 qualitative group discussions, including a short discussion on plain packaging; and

**Premium cigars** - 8 qualitative in-depth interviews among premium cigar smokers.

It should be noted that this research was conducted in conjunction with research into graphic health warnings. The findings of that research are detailed in a separate report.

### 4.2 RYO Smokers

This research targeted Australians aged 18-65 years of age who smoked roll your own (RYO) cigarettes from RYO tobacco packs at least weekly in the last 12 months. A combination of quantitative and qualitative methodologies were used.

Firstly, a quantitative online survey methodology conducted among (n=209) Australians aged 18-65 years old who were current RYO smokers. Online panel members were invited to participate in the survey and screened for age, gender and smoking status. The average time taken to complete the survey was just under 16 minutes. The survey asked respondents to evaluate six pack designs based on measures specified in the Research Objectives in Section 3.

The quantitative results were supplemented with qualitative findings from group discussions conducted for graphic health warnings research, run concurrently with the second phase of plain packaging research. These group discussions were predominantly focused on addressing the objectives for graphic health warnings research, which have been reported on separately. A short discussion around plain packaging was also conducted during the group discussions and findings have been included in

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<sup>4</sup> Research into graphic health warnings have been conducted concurrently with this research and reported in a separate document.

this report to provide further insights into the quantitative results. Although a self-completion questionnaire was administered to RYO group participants in the group discussion sessions to rank the pack designs, this was to stimulate discussion rather than to report quantitative findings as the low sample size prevents reporting of these numbers.

### Sample

The final sample size for the quantitative study was n=209 who smoked RYO cigarettes at least weekly. Soft quotas were set on age and gender to ensure representativeness and sufficient sample sizes for subgroup analysis. The table below details the sample achievements and profile this study.

Table 4.2.1: RYO Quantitative Sample Profile

Target Groups	Target Quotas	Sample size
Male 18-24 year olds	min n=30	n=24
Male 25-44 year olds	min n=30	n=34
Male 45-65 year olds	min n=30	n=44
Female 18-24 year olds	min n=30	n=35
Female 25-44 year olds	min n=30	n=35
Female 45-65 year olds	min n=30	n=35
Other Gender 18-65 year olds	No quotas set	n=0
Total	n=200	n=209

Note, due to the difficulties in recruiting 18-24 year old male RYO smokers, quotas were opened to allow for a higher sampling of other male age groups.

The qualitative discussions were conducted in metropolitan areas of New South Wales and Queensland, lasting one and a half hours in length. Two groups were conducted with RYO smokers who smoked RYO cigarettes at least once a week if not more often, and there were 4-8 respondents in each group. The groups were split by age with one comprised of respondents aged 18-30 and the other of those 30 and over. The groups were of mixed gender and socio-economic criteria was stipulated for recruitment. The sample structure of the group participants are shown in the table below.

Table 4.2.2: RYO Qualitative Sample Structure

Group	Smoking behaviour	Age	Location	State
1	RYO tobacco weekly or more	18-30	Metro	NSW
2		30+		QLD

### 4.3 Cigarillo/little Cigars

A quantitative self completion survey was administered to cigarillo smokers participating in group discussions under the graphic health warning research. A total of n=30 participants completed the 10 minute survey. Respondents were asked to rank a total of six pack designs including a mock up plain packaging pack (featuring the brand 'Mayfair') on the key measures addressed in the Research Objectives in Section 3.

The quantitative results were supplemented with qualitative findings from the group discussions conducted for graphic health warnings research that was run concurrently with this research project. These group discussions were predominantly focused on addressing the objectives for graphic health warnings research, which have been reported on separately. A short discussion around plain packaging was also conducted during the group discussions and findings have been included in this report to provide further insights into the quantitative results.

Five qualitative group discussions were conducted among the cigarillo/little cigar smokers. The qualitative discussions were conducted in metropolitan areas of New South Wales, Victoria and Queensland, lasting one and a half hours in length, and consisted of 4-8 respondents in each group. All the cigarillo / little cigars smokers were recruited as smoking those products at least once a week if not more often. The groups were of mixed gender and socio-economic status, and included Australian adults 18 and over. The sample structure of the group participants is shown in the table below.

Table 4.3.1. Cigarillos/little Cigars Qualitative Sample Structure

Group	Smoking behaviour	Location	State
1	Smoke cigarillos / little cigars weekly or more	Metro	NSW
2			
3			VIC
4			
5			QLD

### 4.4 Premium Cigars

In-depth interviews were conducted with eight premium cigar smokers in metropolitan areas of New South Wales, Victoria and Queensland. Each interview was conducted face-to-face and was of 40-50 minutes duration. All the respondents were recruited as willing to spend \$25 or more on a premium cigar at least once a fortnight or more frequently. There was no gender or socio-economic criteria for recruitment. The sample structure of the participants is shown in the table below.

Table 4.4.1. Premium Cigars Qualitative Sample Structure

Interview	Smoking behaviour	Location	State
1	Smoke premium cigars once a fortnight or more frequently	Metro	NSW
2			
3			
4			VIC
5			
6			
7			
8			

#### 4.5 Recruitment of Respondents

Recruitment for the online quantitative RYO survey was via online panel members.<sup>5</sup> Respondents were screened for demographic and smoking behaviour. Any respondents working in or in close contact with conflicting industries were excluded.

Recruitment for the discussion groups was completed through Interviewer Quality Control Australia (IQCA) accredited recruitment specialists. A recruitment screener including all relevant demographic variables was provided to use for recruitment. A copy of the recruitment screener is at Appendix D.

#### 4.6 Quantitative Questionnaires

There were two types of surveys used for the quantitative analysis, an online survey for RYO smokers and a self completion paper and pen survey for cigarillo/little cigar smokers. Both questionnaires asked respondents to evaluate (rate or rank) six pack designs according to the key measures outlined in the research objectives. As the cigarillo questionnaire was a paper and pen survey, the design was a very simplified version of the online quantitative survey. Full questionnaires can be found in Appendices A and B.

#### 4.7 Qualitative Discussion Guides

Semi-structured discussion guides were developed for use during the qualitative discussions with each of the target audiences and all were approved by the Department prior to use. The general structure of each guide was as follows:

<sup>5</sup> Research Now provided the online panel for this study. Research Now’s panels are research only, that is their members are contacted for research purposes only. Their panellists are recruited from multiple sources and through double opt-in process. Email invitations are sent to panellists when relevant surveys are launched and participation is voluntary. Panellists are incentivised for their completion of surveys and provided a reward consistent with the survey length. The rewards are in the form of reward points that can be redeemed for vouchers.

- introduction;
- exploring views on plain packaging of tobacco products (premium cigar smokers only);
- understanding existing smoking and purchasing behaviour;
- exploring participant relationships with brands (if any); and
- administering self completion questionnaire (for cigarillo / little cigar and RYO smokers only).

Full discussion guides can be found in Appendices A, B and C.

#### 4.8 Stimulus

A graphic designer was employed to create plain pack mock-up designs for the different tobacco products. The specifications for the plain pack mock-up designs were provided by the Department and the final materials were approved prior to their use in the research. These included:

- images of plain pack cigar tubes, loose single-sale cigars with a plain pack 'band', and a plain pack 'bag' for cigars; and
- a mock up plain packaging RYO pouch featuring the brand name 'Mayfair' plus images of 75% graphic health warning coverage on five existing branded RYO pouches;
- a mock up plain packaging cigarillo square box featuring the brand name 'Mayfair' plus images of 75% graphic health warning coverage on five existing branded cigarillo boxes;

The mock up packs were designed according to the intended plain packaging specifications and the graphic health warning design recommendations were applied to the pack images of existing brands. Each RYO and cigarillo pack featured the same graphic health warning, "Smoking causes mouth and throat cancer", which covered 75% of the front of pack. The images of mock up cigar tubes only featured the health warning statement 'Smoking cigars causes lung cancer'. The mock up cigar bag image features the graphic health warning 'Smoking cigars causes lung cancer' covering 75% of the front of the bag. Images of the stimulus used can be found in Appendix C.

Stimulus developed for testing across the range of tobacco products included a mix of actual physical mock ups and images on boards. For RYO tobacco and cigarillo packs, physical plain packaged mock ups were prepared to determine optimum layout and format for health warnings on the packaging of those products, primarily for the separately reported graphic health warning research. To achieve the plain packaging research objectives, health warnings were digitally imposed on images of existing tobacco products with the branding made visible on them in accordance with the specifications set out by the Department.

In the case of cigar tubes it was not possible to produce images of branded products that would show both the health warning in full as well as the brand. This was due to the specification that the health warning take up 60% of the circumference and 95% of the length of the tube. It was determined that images showing only the health warning or branding in part would not be useful for research purposes. In addition, time constraints meant it was not possible to create physical mock ups of cigar tubes.



Therefore, the comparison was between images of a digitally created plain packaged cigar tube with the full health warning and images of existing branded cigar tubes with no health warning.

Consistent with previous rounds of research the plain pack mock up products used in the research were branded as 'Mayfair'. This brand name was chosen as there is currently no other similarly named tobacco product in the Australian market. Therefore there would be no latent association with the brand name among the research audiences.

As mentioned above, existing branded products for RYO tobacco, cigarillos / little cigars, and premium cigars were employed as comparative products to the plain pack 'Mayfair' mock up products. These products were chosen in conjunction with the Department as representative of a range of well known and recognisable brands to which it was felt respondents would have some current association. Wherever possible, a range of colours and price points ('value', 'mainstream' and 'premium') were also selected for each product type.

#### 4.9 Analysis

##### Significance Testing

Analysis focused on identifying the best and worst packs on the criteria of appeal, quality of cigarettes, perceived harm to health, ease of quitting and noticeability of the health warning. This has been done through ordered ranking and comparisons between the existing packs and the mock up plain package design. Significance testing was also applied to test for statistical differences between different packs and different age groups, specifically to compare the performance of the mock-up plain packaging pack against existing branded packs.

##### Maximum Difference or 'Best' – 'Worst' Scaling Analysis

Maximum Difference Scaling (Max-Diff), also known as 'Best-Worst' scaling, is a technique whereby respondents are shown a subset of the possible combinations of items being tested in the study. They are asked to indicate the best and worst items (or most and least important). This approach can be thought of as a more sophisticated extension of the Method of Paired Comparisons where each item can be compared to every other item being tested. Max-Diff is appropriate when researching a larger number of test items.

The scores obtained from the survey were analysed to obtain a composite score for each dimension using Hierarchical Bayes estimation (HB). In the Maximum Difference exercise, respondents evaluated three out of the total six test packs. For each set of three packs, the respondent indicated the 'best' and 'worst' pack on a given dimension. Individual respondents' responses are analysed using HB techniques to derive attribute importance or preference scores at the individual respondent level. In this case, a single score is calculated that indicated performance of a pack in terms of the key dimensions. This is discussed in further detail in Appendix A: Roll your own (RYO).



## Weighting

As there was no population data available for RYO smokers in the public domain, the population profile for RYO smokers was derived from the quantitative data for Study 2. Using this population profile, the data from this study has been post-weighted to the RYO daily and weekly smoking population for representativeness.<sup>6</sup> Data has been weighted using age, gender and smoking frequency. Refer to Appendix A: Roll your own (RYO). It is worth noting that there was only population data available for the age bracket 45-64 years old. However as our sample included smokers aged 65 years old, weights relating to the smokers 45-64 years old were applied to the sample data for 45-65 year olds.

Data from the self completion questionnaires for cigarillo smokers was not weighted due to the low sample size. Findings from this section are reported using unweighted data and the sample may not be representative of all cigarillo smokers.

## Qualitative Analysis

A thematic analysis model was used for the qualitative research. This involves participant views and opinions being analysed to find common themes and patterns. All researchers on the project contributed to the analysis by referring to their notes and transcripts and developing hypotheses based on the interviews and group discussions they conducted. Following this all project members participated in numerous debriefing sessions to discuss and plan analysis of the results. Within these, data was collated into potential themes using all the data relevant to each and identifying frameworks for further in-depth analysis. Ongoing analysis sessions refined the specifics of each theme and ensured the analysis addressed the research objectives. This was an iterative process that continued through the writing of the report. For this project the analysis referred to the full range of data sources collected throughout the project including self complete forms used during group discussions and the notes, audio tapes and transcripts emerging from them.

A further note on the use of qualitative and quantitative research is included in Appendix E.

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<sup>6</sup> Research to determine effective plain packaging of cigarettes, Study 2

## 5 ROLL YOUR OWN (RYO)

The findings from this section of the report are drawn from the online quantitative survey (n=209). The quantitative results are supplemented by the short qualitative discussion on plain packaging conducted in the group discussions for the graphic health warning research.

### 5.1 About the Qualitative Sample

Two qualitative discussion groups were held in addition to the quantitative survey (see section 4.2 of this report for further details about the sample and methodology). These were used to explore some of the attitudes of RYO smokers to the issue of plain packaging and of how they viewed their own smoking behaviours. The findings from these shed some light on the quantitative survey results and will be discussed as appropriate throughout this section.

Overall, few participants had given the plain packaging issue much thought assuming that it would affect mostly pre-manufactured cigarette smokers. The lack of consideration for how it might be implemented on RYO packs may stem the little media attention this aspect has been given.

*"You only hear about them talking about normal packs. I don't think I've heard anything about roll your own really."*

There was in general low knowledge or active consideration of plain packaging. While the participants had heard of it there was a significantly less vehement reaction to the proposal than that recorded among cigarette smokers in previous studies, and among cigarillo smokers in this study. This somewhat reflects how RYO smokers view themselves apart from smokers of other types of tobacco, including that the proposed changes are really aimed at the pre-manufactured cigarette smokers who they feel are the main target.

*"It's not really for us, we're getting swept up in it, but I think people have an issue with straight cigarettes which stink more and more people smoke. So that's the target really. I hadn't thought about it affecting us too much before."*

Compared with the cigar or cigarillo smokers, the RYO smokers taking part in the research were a much more uniform audience with relatively similar views, habits and behaviors in regards to their own smoking. The reasons why RYO smokers chose to smoke RYO cigarettes rather than pre-manufactured cigarettes that were consistently voiced by the majority of respondents include:

*"A budget / cost analysis. RYO tobacco is cheaper than pre-manufactured cigarette packs and yield a greater number of cigarettes."*

*"You get so much more for your money. I can get 40 or 50 cigarettes out of a pack for half of what that would cost me with pre-made ones."*

*"Tailored cigarettes are so expensive! I get more out of my rollies for sure."*



The taste is preferable. In particular this was articulated in relation to being able to taste 'the chemicals' in pre-manufactured cigarettes, which led them state they significantly preferred RYO cigarettes.

*"They taste so much better. Once you've had them for a while and you try and normal cigarette you can just taste the chemicals in them...pretty disgusting actually."*

Feeling 'distinct' from pre-manufactured cigarette smokers. RYO smokers felt themselves, in comparison to pre-manufactured cigarette smokers, to be 'more relaxed' and 'easy going'.

*"I think roll your own smokers are a bit more chilled out, less stressed. They probably enjoy it more too because you've actually got to bother to roll a cigarette you know, you can't just pull it out the pack. If I actually bother to roll one I'm going to enjoy it you know."*

Duration. RYO cigarettes last longer than pre-manufactured cigarettes which many smokers enjoy and gives the feeling that they may smoke less because of it.

*"They definitely last longer. I can have one while my friends have two normal ones."*

*"I probably smoke less because they last longer I reckon."*

## 5.2 Overall Appeal

There was a clear divide between the packs in terms of appeal. Three packs, Mayfair (plain package), White Ox and Winfield Gold were seen to be the least appealing packs whilst Golden Virginia, Champion and Drum were the most appealing packs. The Mayfair (plain package) pack was seen to be the least appealing pack (6.7%). It scored significantly lower on appeal than three other packs, Drum (27.3%), Champion (21.7%) and Golden Virginia (21.0%). The relative appeal of the different packs was consistent across different age groups.

The overall appeal of the packs was also influenced by existing brand associations which became evident in the qualitative findings. In particular White Ox had extremely low appeal as a product and was felt to be one only consumed by people they would not want to be associated with. Most often this association was with prison populations and homeless people. It was also felt to be smoked by people who were highly addicted as it is known as an extremely strong tobacco.

*"Hobos and prisoners smoke that...not for me, never, no thanks."*

*"That stuff is so strong, you're a proper addict if you smoke that."*

The Mayfair pack performed strongly on all the measures identified by the Department. It was seen as highly unappealing and unattractive. Equally, as will be demonstrated below, the quality of cigarette was deemed as likely to be very low. The plain packaging colour and design, described as 'dull', 'tar-

like' and 'uninteresting' was primarily responsible for this perception of low quality. This was tied to the level of perceived harm to health which was high.

Table 5.2.1: RYO Overall Pack Appeal

	Pack	Study RYO Total (n=209) %	Age 18-24 years (n=61) %	Age 25-44 years (n=79) %	Age 45-65 years (n=69) %
Least appealing overall	Mayfair (plain package)	6.7	5.6	7.8	5.0
	White Ox	11.6	10.8	11.2	12.5
	Winfield Gold	11.7	16.6	11.9	9.6
	Golden Virginia	21.0 ▲	17.7▲	20.9▲	22.4▲
Most appealing overall	Champion	21.7▲	22.1▲	22.3▲	20.3▲
	Drum	27.3▲	27.2▲	25.8▲	30.2▲

P1A. Looking at these three roll you own tobacco packs, please indicate which pack you think is the...  
 Most appealing overall and the Least appealing overall?  
 Composite score calculated using both most and least scores  
 ^~ Significantly higher / lower than other age groups at 95% c.i.  
 ▲ Significantly higher than Mayfair (plain package) at 95% c.i.

The table above shows the Maximum-Differences scores for each branded pack. Each score is a composite score that is calculated based on the proportion that selected the pack as 'most' or 'least' on the dimension measured compared to the other packs. In the table, the packs with the lowest percentage scores are those that were less likely to be selected as 'most appealing' and more likely to be selected as 'least appealing'. So the Mayfair (plain package) pack which had the lowest percentage score overall (6.7%) was seen to be the least appealing whilst the Drum (27.3%), Champion (21.7%) Golden Virginia pack (21.0%) had the highest scores and were therefore more appealing. Significance testing has also been applied.<sup>7</sup>

<sup>7</sup> Significance testing has been applied to show significant differences between the Mayfair (plain package) pack compared to other packs. The solid triangle denotes that a pack scored significantly higher than the Mayfair (plain package) pack.

### 5.3 Quality of Cigarettes

In line with appeal, three packs, Mayfair (plain package), White Ox and Winfield Gold were seen to contain the lowest quality cigarettes. Golden Virginia, Champion and Drum, the packs which were seen to be most appealing were also seen to contain higher quality cigarettes.

As shown in the table below, across the total sample, the Mayfair (plain package) pack was seen to contain the lowest quality cigarettes (8.0%). The White Ox pack was also seen to contain lower quality cigarettes (10.6%) compared to the other packs. The packs which were seen to contain the highest quality cigarettes were Champion (23.9%), Drum (22.6%), Golden Virginia (21.1%) and these packs scored significantly higher than the Mayfair (plain package) pack on perceived quality.

There were some statistical differences observed for the different age groups. Older RYO smokers aged 45-65 years old were even more likely to consider the Mayfair (plain package) pack to have lower quality cigarettes with a score of 4.4% compared to 8.0% across the total sample.

Table 5.3.1: RYO Quality of Tobacco

	Pack	Study RYO Total (n=209) %	Age 18-24 years (n=61) %	Age 25-44 years (n=79) %	Age 45-65 years (n=69) %
Lowest quality cigarettes	Mayfair (plain package)	8.0	5.7	10.3 <sup>^</sup>	4.4 <sup>~</sup>
	White Ox	10.6	11.9	9.7	11.7
	Winfield Gold	13.9	22.9 <sup>▲</sup>	13.8	11.0
	Golden Virginia	21.1 <sup>▲</sup>	18.3 <sup>▲</sup>	21.0	22.4 <sup>▲</sup>
Highest quality cigarettes	Drum	22.6 <sup>▲</sup>	20.0 <sup>▲</sup>	20.6 <sup>~</sup>	27.3 <sup>^</sup>
	Champion	23.9 <sup>▲</sup>	21.3 <sup>▲</sup>	24.6 <sup>▲</sup>	23.3 <sup>▲</sup>

P2A. Now you are going to see another six screens with the same roll your own cigarette packs. We'd now like you to indicate which pack looks like it contains the...

Highest quality and Lowest quality roll your own cigarettes?

Composite score calculated using both most and least scores

<sup>^</sup><sup>~</sup> Significantly higher / lower than other age groups at 95% c.i.

<sup>▲</sup> Significantly higher than Mayfair (plain package) at 95% c.i.

The qualitative findings reveal that the plain pack colour and design was largely responsible for the perception that the quality of cigarettes or tobacco would be very low in the Mayfair pack. The drab dark brown colour was off putting and communicated to respondents that the product contained within would likely be of poor quality.

*"It doesn't make you think 'smoke me, I'll be good'. It's off putting and looks like it'll probably just be rubbish in there."*

#### 5.4 Harm to Health

In line with previous findings from earlier plain packaging research, darker colours, in this case White Ox, Mayfair (plain package), were seen to be more harmful to health than lighter colours.<sup>8</sup> There is also evidence of a link between appeal, quality and perceived harm. Those packs seen to be less appealing and contain lower quality cigarettes (Mayfair (plain package), White Ox and Winfield Gold) were also seen to be more harmful.

As shown in the table below (Table 5.4.1), the White Ox pack was seen to contain the most harmful cigarettes (25.6%) although this score was not significantly higher than Mayfair (plain package) (20.0%). The Mayfair (plain package) was seen to contain the second most harmful cigarettes. In comparison to Mayfair, there were differences in the scores that indicated that Champion (13.2%), Golden Virginia (13.0%) and Drum (9.9%) contained less harmful cigarettes, however only the Drum pack had significantly lower scores on harm to health.

There were no significant differences in the pack evaluation ratings of perceived harm to health across the age groups. The only exception observed was for younger 18-24 year olds who rated the Winfield Gold pack lower on harm to health than the other age groups did (12.0% compared to 18.3% across the total sample).

The qualitative finding that White Ox holds some extremely negative brand associations goes some way to explaining why it was perceived as more harmful to health than the Mayfair. However, that it only does so by a small margin is testament to the perceived low quality of the tobacco, which is often equated to harm, that the plain pack would contain.

Overall, White Ox was felt by respondents to only be smoked by highly addicted smokers who most likely smoked heavily. It is also known as a very strong tobacco and as such was felt by most to be the most harmful, both by its strong nature and because of the behavioural habits of those that smoke it.

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<sup>8</sup> Study 2 Plain packaging research and Study 5 Face-to-face Plain packaging research.

Table 5.4.1: RYO Perceived Harm to Health

	Pack	Study RYO Total (n=209) %	Age 18-24 years (n=61) %	Age 25-44 years (n=79) %	Age 45-65 years (n=69) %
Most harmful cigarettes	White Ox	25.6	29.0	26.0	23.7
	Mayfair (plain package)	20.0	17.8	20.6	19.5
	Winfield Gold	18.3	12.0 <sup>^</sup>	17.8	21.7
Least harmful cigarettes	Champion	13.2	14.4	13.8	11.6
	Golden Virginia	13.0	13.7	12.2	14.3
	Drum	9.9 <sup>▼</sup>	13.1	9.6 <sup>▼</sup>	9.2

P3A. Now you are going to see another six screens with the same roll your own cigarette pack. We'd now like you to indicate which roll pack looks like it contains roll your own cigarettes that are the...Most harmful and the Least harmful to health?

Composite score calculated using both most and least scores

<sup>^</sup> Significantly higher / lower than other age groups at 95% c.i.

<sup>▼</sup> Significantly lower than Mayfair (plain package) at 95% c.i.

## 5.5 Ease of Quitting

This question was open to a degree of interpretation. In previous research, including the earlier plain packaging studies on manufactured cigarettes, those packs that were seen to be less appealing, have lower quality cigarettes and higher perceived harm to health were also seen to be harder to quit. This was not as consistent when talking to RYO smokers in this study. The qualitative discussions made clear that some respondents would answer this question thinking about which brand is easiest to quit as the one they felt least palatable and would least want to smoke themselves. Others thought about the questions in regards to which brand they felt was the most 'addictive' and therefore hardest to quit.

This may account for why there were no packs that emerged as being perceived particularly easier or harder to quit. Quantitatively, across all the packs tested, there were no statistically significant differences in the pack evaluation ratings for perceived ease of quitting, as shown in Table 5.5.1 below.

While not statistically significant, the Mayfair (plain package) was seen to contain the cigarettes that would be the hardest to quit.



Interestingly, the White Ox pack, which was seen to perform similarly to the Mayfair (plain package) pack in terms of having low appeal, lower quality cigarettes and higher harm to health, was seen to be the 'easiest' of the packs to quit (15.0%) (although again this was not statistically significant). In the qualitative discussions with RYO smokers it emerged that White Ox has some specific brand associations which likely explain why it was seen as being easier to quit.

*"That's what you smoke if you're in lock up."*

*"It's just dirty. It's so strong, you only hear about prisoners or bums smoking that."*

As such respondents talked about it as something less palatable which they would avoid and therefore be easier to quit. Those that felt it would not be easy to quit based this on the strength of the tobacco. Therefore, it scored as 'easier' to quit than Mayfair as it was so undesirable but still gathered some scores of being hard to quit as it was seen as 'strong' and therefore 'addictive' or more likely smoked by 'addicted' smokers who would find it hard to give up.

Overall both the qualitative and quantitative findings suggest that respondents were likely to see all RYO cigarettes as being hard to quit. There is an acknowledgement that tobacco products are addictive and therefore by their nature hard to quit.



Table 5.5.1: RYO Perceived Ease of Quitting

	Pack	Study RYO Total (n=209) %	Age 18-24 years (n=61) %	Age 25-44 years (n=79) %	Age 45-65 years (n=69) %
Hardest to quit	Mayfair (plain package)	18.2	20.1	16.7	20.5
	Drum	17.2	14.9	18.8	15.0
	Golden Virginia	17.1	16.1	19.2 <sup>^</sup>	13.7 <sup>▼</sup>
	Winfield Gold	17.1	19.8	15.2	19.9
Easiest to quit	Champion	15.3	14.0	15.6	15.2
	White Ox	15.0	15.1	14.5	15.8

P4A. Now you are going to see another six screens with the same roll your own cigarette pack. We'd now like you to indicate which pack looks like it would contain roll your own cigarettes that would be... Easiest to quit and Hardest to quit  
 Composite score calculated using both most and least scores  
<sup>^</sup> Significantly higher / lower than other age groups at 95% c.i.  
<sup>▼</sup> Significantly lower than Mayfair (plain package) at 95% c.i.

## 5.6 Noticeability of Health Warning

The scores for 'noticeability of health warning' suggest that there were no pack designs in which the health warning stood out significantly more or less than the others. This is not a surprising finding in that all packs featured a 75% coverage health warning, coverage that is considerably larger than current health warnings and which dominates the space on the front of the pack. The Mayfair (plain package) pack did not appear to have a health warning that stood out more or less than any of the other packs, as shown in the table below (Table 5.6.1).

At 75% health warning coverage, there was also no evidence that higher contrast between the background pack colour and health warning would result in higher noticeability of the health warning. Champion with a yellow pack was seen to have the health warning that stood out the most (17.5%) meanwhile Winfield Gold which also had a lighter coloured background was seen to have the health warning that stood out the least (15.4%), as shown in the table below (Table 5.6.1).

There was only one age group which showed significantly different perceptions in terms of the noticeability of health warnings. Relative to other age groups, younger smokers aged 18-24 years old were less likely to consider the Drum pack (14.5%) as having a health warning that stood out.



Table 5.6.1: RYO Noticeability of Health Warning

	Pack	Study RYO Total (n=209) %	Age 18-24 years (n=61) %	Age 25-44 years (n=79) %	Age 45-65 years (n=69) %
Stand out the most	Champion	17.5	17.7	16.7	19.1
	Drum	17.5	14.5 <sup>~</sup>	17.8	17.9
	White Ox	17.3	18.7	17.7	16.1
	Mayfair (plain package)	16.5	16.7	17.2	15.2
Stand out the least	Golden Virginia	15.7	14.2	15.2	17.3
	Winfield Gold	15.4	18.2	15.5	14.4

P5. Now looking at these six cigarette packs, we'd like you to indicate how noticeable the graphic health warnings are on each of these packs. That is, whether there are any differences in how much the graphic health warning stands out on these different packs. To do this, we'd like you to allocate a score based on the notice-ability of each pack so that all scores add to 100.

<sup>~</sup> Significantly higher / lower than other age groups at 95% c.i.

<sup>▼</sup> Significantly lower than Mayfair (plain package) at 95% c.i.

## 6 CIGARILLO / LITTLE CIGARS

The findings in this section of the report are drawn from the quantitative self completion questionnaires (n=30). They are supplemented by qualitative findings from the short qualitative discussion on plain packaging conducted in the group discussions for the graphic health warning research.

### 6.1 About the Sample

Five qualitative group discussions were conducted among the cigarillo/little cigar smokers (see section 4.3 of this report for further details about the sample and methodology).

The qualitative research suggests that there are two distinct types of cigarillos smokers. The first of these were those that also smoked premium cigars as well, rather than cigarettes or other tobacco products. This group tended to be very similar in attitudes and behaviours as the more frequent cigar smokers. They may have a cigarillo on a daily basis or a couple of times a week. Rather than a social occasion, smoking a cigarillo was more likely to be a part of their routine, for example, what they did at the end of work every day or a couple times a week to relax. Cigarillos were chosen over cigars as a means of enjoying the taste of cigar smoke, while not being as expensive or taking as long. These cigarillo smokers would often enjoy a full size premium cigar with others in a social setting. They bought their cigarillos from specialist cigar stockists and / or directly from overseas.

The other type of cigarillo smokers was typically also a cigarette smoker or had been so in the past. This group claimed to smoke cigarillos for a number of reasons:

- perceived to taste better than cigarettes;
- reportedly smoked less cigarillos than they would smoke cigarettes, therefore it was seen as more affordable and ultimately not as bad for their health;
- the act of smoking a cigarillo held an element of occasion, which many found enjoyable and relaxing as part of a routine, such as after dinner of an evening; and
- for a small few it was associated with a sense of status, with it being perceived as more refined / sophisticated than cigarettes.

While this group identified that cigarillo smoking was likely to have health effects, these were seen to be less than would occur with cigarettes. They saw smoking cigarillos as a safer alternative to smoking cigarettes. Interestingly, while some did not inhale the smoke, other did so and were even surprised at hearing that it was not normal practice to do so.

These cigarillo smokers tended to have established brand relationships, only smoking specific brands (although this was often a matter of convenience, that is, being able to commonly buy these brands). That said, there was some sense that some brands were of higher quality than others, although this was often related to familiarity, with cigarillo smokers generally not having a large amount of previous knowledge of other brands than their preferred.



This group of cigarillo smokers customarily purchased their preferred brands from local tobacconists, with some brands available in other places that stocked cigarettes such as newsagents, bottleshops and supermarkets.

## 6.2 Overall Appeal

There appeared to be a divide between the packs tested with four brands (Mayfair (plain package), Wee Willem, Cafe Creme and Henri Wintermans) being less appealing. Meanwhile, the other two brands (Davidoff and Captain Black) were seen to be more appealing.

As shown in the table below, the Mayfair (plain package) pack was seen to be the least appealing pack (average rank 4.3 out of 6). Wee Willem, Cafe Creme and Henri Wintermans were also seen to be relatively less appealing (average ranking 3.8-3.9 out of 6). The Davidoff pack was the most appealing pack (average ranking of 2.4 out of 6) followed by Captain Black (average ranking of 2.8 out of 6). The table below shows the average ranking of each pack ordered from least appealing to most appealing.

Table 6.2.1. Cigarillos Overall Appeal

Ranked (average ranking) Total sample (n=30)		Ordered Ranking (average ranking)
Least appealing	Mayfair (plain package) (square box)	4.3
	Wee Willem (square box)	3.9
	Cafe Creme (square Box)	3.8
	Henri Wintermans (rectangular box)	3.8
	Captain Black (rectangular box)	2.8
Most appealing	Davidoff (square box)	2.4
<p>P1A-P5A. Looking at these six cigarillo packs, please rank each of these packs in terms of 'appeal', 'quality of cigarillos', 'harm to health', 'how hard it would be to quit', 'noticeability of health warning'. Please write the number '1' next to the pack you think is 'most...' and '2' next to the pack you think is 'second most ... and so on until all the packs have a number from 1 to 6 next to it.</p>		

From the qualitative discussions it was clear that respondents found the plain packaged cigarillo to be highly unattractive. The colour in particular was off putting. A number of respondents felt their cigarillo smoking distinguished them from cigarette smokers and actively reported the current packaging plays some role in this.

*"The packs look better, they're pretty cool and if you offer a chick one of those it looks good."*

*"They just look classier than cigarettes to me. its a metal tin, it's a bit more respectable."*

The plain pack, however, removed any positive associations they made with their, or any other, brand. The plain pack significantly took away from the appeal of the cigarillo packs.

*"In comparison that's horrible...it's horrible on its own too. I wouldn't want one of those."*

### 6.3 Quality of Cigarillos

Those cigarillo packs which were seen to be less appealing were also seen to contain lower quality cigarillos and visa versa. As shown in Table 6.3.1 below, the Mayfair (plain package) pack was seen to contain the lowest quality cigarillos (average rank 4.5 out of 6). Cafe Creme and Wee Willem were also seen to contain relatively lower quality cigarillos (average ranking 3.8 and 3.7 out of 6, respectively). The Davidoff pack, which was the most appealing pack was seen to contain the highest quality cigarillos (average ranking of 2.4 out of 6). The table below shows the average ranking of each pack ordered from lowest quality cigarillos to highest quality cigarillos.

Table 6.3.1. Cigarillos Quality of Cigarillos

Ranked (average ranking) Total sample (n=30)		Ordered Ranking (average ranking)
Lowest Quality	Mayfair (plain package) (square box)	4.5
	Cafe Creme (square Box)	3.8
	Wee Willem (square box)	3.7
	Henri Wintermans (rectangular box)	3.3
	Captain Black (rectangular box)	3.3
Highest Quality	Davidoff (square box)	2.4

P1A-P5A. Looking at these six cigarillo packs, please rank each of these packs in terms of 'appeal', 'quality of cigarillos', 'harm to health', 'how hard it would be to quit', 'noticeability of health warning'. Please write the number '1' next to the pack you think is 'most...' and '2' next to the pack you think is 'second most ... and so on until all the packs have a number from 1 to 6 next to it.

Emerging from the qualitative discussions it was clear that existing brand associations have a significant impact on perceptions of quality. The perceptions come from either having tried the brand themselves or having heard about them from others. However, even though they had not tried one the respondents felt that the Mayfair plain pack would most likely contain a very low quality cigarillo. This was largely communicated by the colour and unattractive design.

*"Nothing here says quality at all...its the opposite. It says 'I'm horrible, I'm brown, I taste awful.'"*

#### 6.4 Harm to Health

Those cigarillos which were seen to be less appealing and with lower quality cigarettes were also seen to be more harmful to health and vice versa, suggesting a link between appeal, quality and perceived harm. As shown in the table below, the Mayfair (plain package) pack was seen to contain the third most harmful cigarillos (average rank 3.5 out of 6) after Cafe Creme and Wee Willem (average ranking 2.9 and 3.2 out of 6, respectively). The Davidoff pack, which was the most appealing pack and seen to contain the highest quality cigarillos, were seen to be least harmful to health (average ranking of 4.1 out of 6). The table below shows the average ranking of each pack ordered from most harmful to less harmful.

Table 6.4.1. Cigarillos Harm to Health

Ranked (average ranking) Total sample (n=30)		Ordered Ranking (average ranking)
Most harmful to health	Cafe Creme (square Box)	2.9
	Wee Willem (square box)	3.2
	Mayfair (plain package) (square box)	3.5
	Captain Black (rectangular box)	3.6
	Henri Wintermans (rectangular box)	3.7
Least harmful to health	Davidoff (square box)	4.1
P1A-P5A. Looking at these six cigarillo packs, please rank each of these packs in terms of 'appeal', 'quality of cigarillos', 'harm to health', 'how hard it would be to quit', 'noticeability of health warning'. <i>Please write the number '1' next to the pack you think is 'most...' and '2' next to the pack you think is 'second most ... and so on until all the packs have a number from 1 to 6 next to it.</i>		

In the qualitative discussion respondents reported that not having tried a 'Mayfair' plain pack cigarillo a number felt it was difficult to decide how harmful they would be in comparison to those known brands. In particular Cafe Creme and Wee Willem's were felt to be low quality cigarillos which were extremely 'harsh' to smoke. The majority of respondents equated 'harshness' or how 'smooth' a cigarillo was with how harmful it was. This mirrors what was found in previous rounds of research with cigarette smokers. As such they scored those brands as being the most harmful to health.

However, the plain packaging colour, font, and layout do give the impression of a harmful cigarillo. The 'muddy', 'tarry' colour was described as highly unappealing and indicating a likely cheap and 'harsh' product. This is further demonstrated by its position behind those two brands in the questionnaire results for 'low quality' cigarillos. This gives a positive indication that the plain pack will be perceived as harmful to health which is reinforced by the strong opinion that they would contain low quality cigarillos.



*"Those [Cafe Cremes] are harsh and burn your throat, they've got to be among the worst...But these Mayfairs, I've not tried one so how would I know?"*

*"The pack does look like it would be a bit cheap and nasty."*

*"Just from the colour you'd assume they were going to be harsh. It's a tar colour kind of, looks gross."*

## 6.5 Ease of Quitting

Although previous plain packaging testing with manufactured cigarette smokers showed a link between low appeal, low perceived quality of tobacco, high perceived harm to health and perceptions that a pack would be harder to quit, this was not the case with cigarillo smokers. Overall, the quantitative research found little differentiation between the different packs on ease of quitting. As with RYO qualitative findings, there were mixed perceptions about what would make a brand or pack harder or easier to quit. Some participants considered a brand or pack harder to quit if it was seen to be 'more addictive' and some considered it easier to quit if it was so unpalatable, they wouldn't want to smoke it. The interpretation may also have been influenced by the smoking behaviour of cigarillo smokers. The research uncovered two clear types of smokers, those that smoked cigarillo / little cigars almost exclusively and treated them much in the same way as normal cigarettes, and those who were more occasional cigarillo / little cigar smokers who typically smoked less often and were prompted more by occasion, thereby having different views towards addiction and ease of quitting.

As shown in Table 6.5.1 below, quantitatively, the Mayfair (plain package) pack, which was seen to be the least appealing and contain the lowest quality cigarillos, was seen to contain cigarillos which would be easiest to quit (average rank 4.0 out of 6). Meanwhile the Davidoff pack, which was the most appealing pack, seen to contain the highest quality cigarillos and be least harmful to health, was seen to be the hardest of the packs to quit (average ranking of 2.9 out of 6). The Cafe Creme pack, which was seen to be lower on appeal, quality and higher on perceived harm to health (performing similarly to the Mayfair (plain package) pack) was seen to be harder to quit relative to the other packs (average ranking 3.2 out of 6).

Table 6.5.1. Cigarillos Ease of Quitting

Ranked (average ranking) Total sample (n=30)		Ordered Ranking (average ranking)
Hardest to quit	Davidoff (square box)	2.9
	Cafe Creme (square Box)	3.2
	Wee Willem (square box)	3.6
	Henri Wintermans (rectangular box)	3.6
	Captain Black (rectangular box)	3.7
Easiest to quit	Mayfair (plain package) (square box)	4.0
<p>P1A-P5A. Looking at these six cigarillo packs, please rank each of these packs in terms of 'appeal', 'quality of cigarillos', 'harm to health', 'how hard it would be to quit', 'noticeability of health warning'. Please write the number '1' next to the pack you think is 'most...' and '2' next to the pack you think is 'second most ... and so on until all the packs have a number from 1 to 6 next to it.</p>		

It is worth noting that in the questionnaire for cigarillo smokers, they were asked to think about which pack would contain cigarillos that would be 'hardest to quit'. In the RYO questionnaire, respondents were asked the question from the perspective of being 'easiest to quit'.

Overall the qualitative discussions found that that ease of quitting was somewhat tied to perceptions of quality and perceived harm. The cigarillos perceived as less harmful and higher quality were also perceived as harder to quit. However, these views were also mediated by respondents interpretation of the questions which could lead them to answer based on the type of smoker they associated with that brand. For example, the majority did not consider Cafe Creme as attractive or high quality. However, they felt that Cafe Creme smokers were so dedicated to their brand and addicted, given that it was seen as a high strength cigarillo, that it would be harder to quit.

## 6.6 Noticeability of Health Warning

There is a clear pattern that suggests larger packs (square box vs. narrow rectangular packs) had more noticeable health warnings, by nature of being larger. That is, the larger the health warning, the more noticeable the health warning. As shown in the table below (Table 6.6.1), the square box packs (Cafe Creme, Wee Willem, Mayfair (plain package) and Davidoff) were ranked as having the most noticeable health warnings whilst the rectangular packs, which were narrower, were ranked as having less noticeable health warnings. The Mayfair (plain package) pack was rated as having the third most noticeable health warning (average ranking of 3.0 out of 6) sharing relatively similar rankings to the other square box packs tested. Table 6.6.1 below shows the average ranking of each pack ordered from most noticeable health warning to less noticeable health warning.

The Mayfair (plain package) pack did not appear to have a health warning that stood out more or less than the other square box packs. This is not a surprising finding in that all of these packs featured a



75% coverage health warning, coverage that is considerably larger than current health warnings and which dominates the space on the front of the pack.

Table 6.6.1. Cigarillos Noticeability of Health Warning

Ranked (average ranking) Total sample (n=30)		Ordered Ranking (average ranking)
Health warning stands out the most	Cafe Creme (square Box)	2.2
	Wee Willem (square box)	2.7
	Mayfair (plain package) (square box)	3.0
	Davidoff (square box)	3.1
	Captain Black (rectangular box)	4.9
Health warning stands out the least	Henri Wintermans (rectangular box)	5.0
P1A-P5A. Looking at these six cigarillo packs, please rank each of these packs in terms of 'appeal', 'quality of cigarillos', 'harm to health', 'how hard it would be to quit', 'noticeability of health warning'. Please write the number '1' next to the pack you think is 'most...' and '2' next to the pack you think is 'second most ... and so on until all the packs have a number from 1 to 6 next to it.		



## 7 PREMIUM CIGAR SMOKERS

### 7.1 About the Sample

Eight in-depth individual interviews were conducted with smokers of premium cigars (see section 4.4 of this report for further details about the sample and methodology).

Premium cigar smokers differ considerably in their attitude to cigars compared to smokers of other tobacco products. They identify their smoking of cigars as a choice rather than an addiction. Most claimed that they could, and do, easily refrain from smoking cigars if they chose to. Instead, it is seen as a luxury, or even a guilty pleasure that is an indulgence for themselves. The sense of it being a shared social experience was also highly apparent.

Interviews with premium cigar smokers indicated that premium cigar smoking is a very occasion based behaviour. Rather than driven by habit, all respondents saw it as a behaviour that was primarily undertaken and shared with others in a social situation, often in conjunction with a specific activity, for a specific occasion, or in a specific location. Some examples of these types of situations provided by respondents included:

- smoking cigars with a group of friends when they get together for a regular fortnightly or monthly activity such as playing cards or watching sports (specific activity);
- as a conclusion to the day or week, or part of a celebration, such as the birth of a child, a marriage, an employment success (specific occasion);
- as a member of a club that caters for cigar smokers, providing a place where they can enjoy smoking cigars with others and can discuss and learn about different cigars (specific location)

These prompts toward cigar smoking are not mutually exclusive from one another and cigar smokers are not exclusively motivated to smoke by one or the other. For example, some smokers who mostly smoke for specific activities such as a fortnightly card game, may also be prompted to smoke a cigar if an occasion, such as a wedding or christening, occurs.

That said, the interviews indicated there are two different types of cigar smokers. While all premium cigar smokers were recruited as smoking a premium cigar at least once a fortnight, within this there was a range of behaviours. The research encountered two distinct types of premium cigar smokers:

- those that smoke frequently (at least once if not several days a week); and
- those that smoked less frequently (once a fortnight and occasionally more often).

## Frequent Smokers

More frequent cigar smokers, those that smoked on a daily basis or a couple of times a week, were often extremely knowledgeable about the different types of cigars. These cigar smokers tended to visit specialist cigar lounges and bought their cigars from specialist cigar stockists. While they may have specific brands that they tended to smoke, they would regularly try others. In fact, trying other brands and learning about different cigars was one of the key drivers of continuing to smoke cigars. Any preference for a specific brand may be driven by best value for money, the time cigar smoker had to enjoy the cigar, the company and the perceived quality of the tobacco used in the cigar. These types of cigar smokers tended to be well aware of what constituted a quality product, and while they had associations of quality with different brands, they were also other factors that influence the quality of each cigar. They would judge a cigar based on:

- how long it had been aged;
- colour of the tobacco and the leaf wrapping; and
- region of origin.

The brand name and variant of the cigar provides an indication of this type of product information. Brand names are essential in providing cigar smokers with region of origin, and therefore the type and grade of tobacco that the product contains. However, the relationship is with 'cigars' and the notion of smoking 'cigars' rather than with particular brands. The variety, choice and experiencing of new ones is part of the appeal. This is in contrast to the vast majority of cigarette smokers who tend, as previous research has shown, to have dedicated brand associations.

None of the more frequent cigar smokers interviewed smoked any other tobacco product. Some admitted to smoking cigarettes when they were younger, but had given them up after taking up premium cigar smoking. These cigar smokers would occasionally smoke a cigarillo, but only one bought as a single sale at their preferred cigar stockist. The reason for smoking a cigarillo instead of a premium cigar was time. For example, they may only have fifteen minutes to spend relaxing with a cigar, so they choose a smaller product that takes less time to smoke.

## Less frequent smokers

Less frequent smokers of premium cigars tended to smoke these about twice a month on average. Their smoking was generally associated with a specific activity, such as a card game, or an occasion, such as a success at work. These cigar smokers were less knowledgeable about premium cigars and how to determine quality so were more influenced by brand names. However, it was apparent that again, these brand names were seen as an indication of origin of the cigar which these smokers tended to link to quality. For example, less frequent smokers consistently associated quality cigars as being from Cuba, whereas more frequent and knowledgeable smokers of premium cigars would discuss regions within Cuba and were also be able to identify high quality cigars from other countries such as Nicaragua and the Dominican Republic.



Some of these less frequent cigar smokers were often smokers of other tobacco products, including cigarettes. These cigar smokers identified cigar smoking as a different experience to cigarettes. While they felt driven by habit to have a cigarette, cigar smoking was seen as an occasional pleasure.

## 7.2 Perceived Appeal and Attractiveness

The qualitative findings suggest that the proposed plain packaging has an impact on both frequent and less frequent cigar smokers in relation to the appeal and attractiveness of cigars in comparison to how they are currently packaged. There are, however, differences in the strength of this impact depending on the types of cigar smokers involved. In general the connoisseurs and more frequent cigar smokers reported feeling that the plain packaging would be more of an inconvenience but ultimately not affect their smoking behaviour. In contrast the less frequent and more occasion based cigar smokers reported a much stronger feeling that plain packaging may have a significant effect on their smoking behaviour due to lowering the appeal of cigars.

These differences will be highlighted below as each of the plain packaging elements tested in the research are discussed.

### Plain Pack Tube

#### *Frequent smokers*

Among more serious or frequent smokers the tubes were disregarded in terms of having any bearing on quality and were seen as a practical device for carrying cigars if necessary. Overall, many frequent smokers actually saw them as a hindrance as they could not see or smell the cigar, which were key drivers of purchase. They reported largely buying loose cigars:

*"The tubes don't mean anything to me. I want to see the cigar, the colour, texture, feel it in my fingers...all of that is obscured by the tube. I rarely ever buy them like that."*

Two versions of a digitally created plain pack mock up tube were presented, along with a number of other existing cigar tubes, as images on a board to the respondents. Images of these can be found in Appendix C. The frequent cigar smokers did report that they felt the overall appeal and attractiveness of the tubes was decreased. However, their perception on how it would affect their smoking pleasure was minimal. In general they had little to no concern regarding the packaging of cigars. Their criteria for appeal and attractiveness are based on the perceived quality of the tobacco and knowledge of the cigar's origins (not only including where it was made, but how long ago, and in what region of a particular country). They also felt that given their preference to buy loose cigars, the impact of the plain pack tube on their perceptions of appeal and attractiveness were slight.

*"Well, I don't care much for the tubes. I'm really concerned about what's in them. The appeal of a cigar is the quality of the tobacco, the roll, where it's from, is it something I've had before or not, maybe something I've been told"*



*about. All those things make much more difference than what packaging it comes in."*

However, frequent cigar smokers did feel that the plain pack tube would have an impact on their purchasing enjoyment and the appeal of cigar smoking in general. They felt it would render the tobacconists and cigar sellers less appealing and inviting as places to stop and shop. Some reported that it might push their purchases online.

*"It wouldn't be as pleasurable. Walking into a tobacconist and being surrounded by those. No thanks."*

#### *Less frequent smokers*

In contrast the less frequent smokers had a stronger reaction to the plain pack tube. Currently, cigar tubes were seen by the less frequent cigar smokers as a potential sign of a quality product, and were often felt to look 'cool' and increase the sense of occasion when smoking cigars

*"The tubes are good. They look flash. You'd give one of those as a gift, you can't really give a loose one as a gift can you."*

*"I tend to think the tubed ones are maybe a bit higher quality. They've gone to the effort. It looks nice you know."*

When presented with the plain pack tube they reported feeling the appeal and attractiveness of the tubes had been severely decreased. They reported feeling that part of the 'fun' had been removed. Standing out most was the size of the health warning which was unavoidable.

*"No, no, no, no, just no. That is horrible. It's taking all the fun out it!"*

*"That really isn't very pleasant is it. It's quite 'in your face', you can't really escape it...just dull, simply dull."*

*"The writing is massive, you've kind of got to read it it's so big...I don't want to be reminded of that."*

Less frequent smokers reported that currently the purchasing of cigars was part of the ritual and enjoyment involved in cigar smoking. They reported that the 'revealing' of the cigars on a social occasion was one of the highlights of the process. A number of respondents reported paying particular attention to the tubes and packaging, and often spending more than they would normally, in order to impress guests, friends, or to give as gifts. The plain packaged tube was felt to take away this aspect of cigar smoking which was often cited as a main driver in their smoking behaviours.

*"You know, you go into the tobacconist and they're all there lined up looking amazing and you pick out a few that look good, bring them home, and when you're mates are over that bit where you bring them out, it's about impressing them isn't it really, but it's fun."*



*"I've spent more than I wanted to because I wanted to impress someone before. I bought some really fancy cigars in a nice tube and gave them as a gift."*

*"This plain tube, you're hardly going to want to get that out and give it as a gift are you? It's horrible. You actually wouldn't want to give that to someone, not at all."*

## Plain Pack Band

Both frequent and less frequent smokers reported currently leaving the band on their cigars with none reporting that they removed it. However, there were differing perceptions of the purpose of the band, and reactions to the plain pack band were largely driven by those perceptions. As shown to respondents, the plain pack band had no warning statement or image on it but rather consisted only of the a band in the plain pack colour obscuring the branded band underneath. Both frequent and less frequent cigar smokers reported that it stands out significantly, especially in comparison to the existing bands.

### *Frequent smokers*

In contrast to the plain packaged tube it was the more frequent and connoisseur cigar smokers who had the stronger negative reactions to the plain packaged band. This audience considered the band as a vital part of their smoking experience. It was seen as the primary provider of product information and at a minimum told them about where the cigar was made, what type and brand it was. For frequent smokers the band is one of the first places they go to when looking at a cigar, so they immediately noticed the difference with the plain pack band. Therefore, it was felt that if plain packaged bands were to be implemented there would be a need to be able to ensure a means of product identification after the point of sale for single sale cigars

*"I instinctively go to look at the band to have a read of where the cigar is from, who it's made by all that stuff. So yeah, this does stand out because I'm not getting what I'm used to."*

*"If you're all there smoking you have a look at what they've got and what you've got. It is comparing, no big deal, but we probably all do it."*

*"How do I know what I'm getting then? If the band is gone I don't know where it was made, the gauge, although I can guess, who it's made by which is a mark of reliability of quality. How do I tell all that stuff!"*

*"How do I know the guy in the shop isn't selling me a \$10 cigar for \$50?!"*

For frequent and connoisseur cigar smokers the plain packaging band would have no effect on the overall appeal or attractiveness of cigar smoking, but these smokers felt the plain packaging lowered the overall perceived desirability of any given particular cigar as they could not discern any product information. Given the bands are the primary communicators of product information, including



legitimacy and authenticity, these respondents felt implementing a plain pack band would have serious consequences for their ability to make informed purchases. These smokers reported that they may try and find ways of purchasing cigars which would avoid the need for a plain packaging band, and most felt they would probably use the internet to source cigars from overseas

#### *Less frequent smokers*

The impact of cigar bands was lower for less frequent cigar smokers. The majority of less frequent cigar smokers did not feel the band added much to their smoking experience and many reported never taking any notice of it. While the plain pack band stood out as it is not what they expect and they notice the lack of a colourful or embossed band, it was not felt to be totally off putting.

*"It stands out because it's so dull, which is kind of counter intuitive, but because it's not what I'm expecting I can't help but notice it."*

*"It not very nice, it's a bit boring...but compared to that tube, I'd much rather have a plain pack band. I don't really think about the bands anyway."*

*"The band, I don't really look at it to be honest. Not sure I'd know what's on the ones that I smoke."*

*"It's not very nice though. I'd rather not have a band at all really."*

Overall, the impact of a plain packaged band on less frequent cigar smokers would appear to be relatively minimal but may somewhat lower the general appeal and attractiveness of cigar smoking.

#### Plain Pack Bag

The plain packaged bag had little overall effect on the appeal and attractiveness of cigar smoking. This was consistent for both the frequent and less frequent cigar smokers. The bag was seen as a means of carrying their cigars until the point of consumption or they could be transferred to another container. However, no one wanted to be seen carrying a bag with a large graphic health warning on it, or to have to look at the bag themselves. It did serve as a reminder of the negative effects of their cigar smoking.

*"That's not very nice but I'll just throw it away."*

*"Well, I'd rather my cigars come in a bag like that than a tube like this one, but I'd still probably chuck it as soon as I could. It is pretty nasty."*

*"It is a reminder. If the guy hands me a bag with that on, even if I do throw it away it's going to make me think even if only for a second."*



### 7.3 Perceived Quality of the Tobacco

The plain packaging initiatives clearly had an effect on the perceptions of quality among both frequent and casual cigar smokers. As with the perceived appeal and attractiveness, the way in which this manifest was largely dependent on the type of smoker.

#### Plain Pack Tube and Band

##### *Frequent smokers*

Frequent and connoisseur smokers universally reported that the plain packed tube and band made an analysis of the quality of tobacco difficult at and after the point of sale. Therefore, if at and after point of sale a means of providing product information were available, this would largely negate the concerns of frequent smokers. The information they place most emphasis on is region and country of origin, and brand name which is taken as a sign of legitimacy but not necessarily quality in and of itself.

*"I can't tell the quality without the information really. But looking at it, it doesn't look attractive or of good quality. But who knows, it could be an amazing cigar! I'd need some kind of information to go with it."*

##### *Less frequent smokers*

Less frequent cigar smokers had a stronger reaction to the plain packed tube and band in terms of perceived quality of tobacco. They felt that, in particular compared with the existing packs, the plain pack looked like it would most likely contain or be a lower quality product which was therefore much less desirable.

*"It looks nasty, probably is nasty. I mean, compare it to the nice packs and the good looking cigars, I would definitely assumed its cheaper, lower quality, not something I'd want to smoke."*

#### Plain Pack Bag

For both the frequent and less frequent smokers the plain pack bag was felt to have little or no effect on the perceived quality of cigar. The respondents universally saw it as a means of transporting their cigars which they would utilise till the point of consumption or placing in alternative storage, and that it would have no effect on how they perceived the quality of the product they had purchased. Their purchasing decisions, often based on quality, would be made without consideration for the plain pack bag.

*"The bag has no effect on quality, it's a bag...it's not going to make any difference as the cigar gets put in that after I've bought the thing!"*

## 7.4 Perceived Ease of Quitting

The effect on the perceived ease of quitting that plain packaging has is determined by a number of factors. As with the other measures the type of smoker has a strong effect. However, perhaps most significantly is a general attitude held by all the cigar smokers that their smoking behaviour was discretionary rather than habitual. That is, they did not see themselves as 'addicted' or 'addicts' as was the case with many smokers of other types of tobacco products (most commonly cigarettes). As such they did not see 'quitting' as something relevant to them.

*"I don't see myself as addicted. I used to smoke cigarettes and that was a habitual thing, I just had to have them. But cigars are different. I only get them for certain occasions...it's a treat. I see it as a discretionary choice so I wouldn't consider myself addicted."*

*"There's nothing to quit really. I'm smoking every day, I'm not addicted. Well, maybe to the occasion of it, I like coming here to have a smoke, but I don't get nicotine cravings or anything like that."*

Cigars are treated as an often 'guilty pleasure' and seen in the same light as enjoying certain types of alcohol such as whiskey or fine wines. Equally, all the cigar smokers felt their relationship was with 'cigars' (which includes the ritual, the occasion, and nuances of cigar smoking) rather than with particular brands. The variety, choice and experiencing of new cigars is part of the appeal rather than dedicated brand associations as is often the case with cigarettes. As such cigar smokers tended to have little sense of any need to quit, but rather were prompted to think about the frequency with which they smoke cigars.

*"If its' just something I'm doing now and then, like having a port or a brandy, then so be it. I don't need to quit, I don't see cigars as something that detrimental to my health."*

### Plain Pack Tube

However, there were some distinctions between the less frequent and more frequent cigar smokers. The impact of plain packaging was felt more strongly for the less frequent smokers in terms of the perceived ease of quitting cigars. A number of the less frequent cigar smokers felt that the unappealing nature and poor perceptions of quality associated with the plain packaged tube would encourage them to either think about quitting, or would decrease the frequency with which they purchase and smoked cigars. This was the case with those who reported often buying cigars on a whim or without as much pre-planning as others.

*"If I'm down the bottle-o and thinking about buying a cigar and see that. I don't think I'd buy it you know."*

*"If I'm planning on going to a wedding I'll still buy it, but otherwise, if it was just a spur of the moment thing I think that would help me not buy them."*

*"I think over time these plain packs would just make it less and less appealing and I'd probably stop after a while."*

## Plain Pack Bag

For both frequent and less frequent smokers the plain bag was felt to have a limited effect on the perceived ease of quitting. In the qualitative in-depth interviews it was clear that the large size of the graphic health warning makes it immediately noticeable and the health warning message is conveyed instantly. However, given that the bag is seen as a transportation device, and one that they would quite likely throw away instantly and therefore not engage with, any effect it might have on prompting them towards quitting is likely to be low.

### 7.5 Noticeability of the graphic health warning

Given that there are currently no health warnings on single sale cigars, the noticeability of the graphic health warnings on the mock up images presented was extremely high. Please note that the research did not test the tubes in the plain pack colour displaying a health warning against existing branded tubes which had been mocked up to include a graphic health warning. This is discussed further in section 5.8. As such, the plain pack tubes were only compared with existing products as they stand (which do not have a health warning). For that reason, the impact of plain packaging on noticeability of health warnings for cigars was not specifically tested in this research. However, some comments coming out of the qualitative interviews are included below.

## Plain Pack Tube

Given that currently cigar tubes have no health warnings on them the health warning statement on the mock up images stood out to all cigar smokers. It was seen as quite confronting in terms of the size of the health warning and how much of the tube it takes up.

*"It's full on isn't it. No room for any fun on there!"*

The size of the health warning, and the large proportion of the tube that it covers (95% of length and 60% of circumference), induced respondents to primarily comment on the health warning statement. The plain packaging element and colour became recessive. Although the plain packaging was still commented on the health warning was the dominant element.

*"I did notice there isn't anything else on the tube, but really I just keep reading the statement over and over."*

## Plain Pack Bag

The plain packaged bag was felt to have an extremely noticeable graphic health warning. This was largely due to the size of the bag and that the health warning took up 75% of it.

*"You can't help but see it really, it's pretty big....makes you think."*

*"How can you avoid it? I might not have the bag for long but I would notice that."*

The colour of the plain packaged bag also stood out.

## 8 CONCLUSIONS

The clear evidence emerging from both the quantitative and the qualitative findings points to the plain packaging colour and design, across RYO, cigarillos and premium cigars, as:

- minimising appeal and perceptions of quality; and
- maximising perceptions of harm to health.

There were varying impacts of plain packaging on perceptions of 'ease of quitting'. Products in plain packaging can be viewed as being 'harder to quit' if seen to be a stronger more addictive product (if one is already smoking them) or as 'easier to quit' if seen to be so unappealing that one would not consider smoking them. There were also differences across the product and audience range. For example, frequent premium cigar smokers felt largely unaffected by the plain packaging of cigar tubes and therefore unlikely to quit because of them. In contrast less frequent premium cigar smokers felt that the plain packaging of cigar tubes significantly lowers their appeal and their suitability for specific occasions (such as gift giving) and were thus more likely to quit.

In terms of ease of quitting for RYO and cigarillo smokers, although there was no consistency in the plain pack performance quantitatively ('hardest to quit' for RYO and 'easiest' to quit' for cigarillo smokers) the qualitative research suggests that these 'extremes' are driven by low desirability of the pack.

The only area where the plain pack did not outdo other packs was on the impact of noticeability of the health warnings for RYO and cigarillo / little cigar smokers. When the graphic health warning has 75% pack coverage, plain packaging had limited additional impact on the noticeability of health warnings for RYO and cigarillo / little cigars. The findings indicate that once a 75% coverage is used the health warning was very noticeable regardless of whether the pack was branded or not. The impact of plain packaging on noticeability of health warnings for cigars was not tested in this research. However, given the strong effect plain packaging has on all other measures this is not to say that it should not be implemented or that this would reduce the effect on those other measures.

Existing associations had a significant impact on how smokers of all tobacco products tested in the research view particular brands. In particular, packaging is a significant means of informing these perceptions. This is the case for RYO, cigarillo / little cigar and less frequent premium cigar smokers. For more frequent cigar smokers, rather than the packaging it is the cigar bands, which act as markers of legitimacy and carry essential product information, in particular for single sale loose cigars. Frequent and connoisseur smokers feel the bands are an essential means of identifying what product they want to purchase and consume. As such, introduction of the plain pack band was felt likely to lower the ability of this category of consumers to purchase products they felt informed about and felt confident were legitimate. This suggests a need to make product information available by some other means at and after point of sale.

Overall, the quantitative and qualitative results indicate that in minimising the existing brand associations by introducing plain packaging measures, the proposed Mayfair plain pack performs strongly on the key measures identified by the Department across the products under research, in particular in reducing overall appeal and perceived quality of tobacco and increasing perceived harm to health.



9 APPENDIX A: ROLL YOUR OWN (RYO)

9.1 Population targets (RYO daily and Weekly Smokers) for Weighting

The quantitative sample for the RYO component was weighted to the population profile shown in the table below for representativeness. These figures were taken from an earlier plain packaging study as data on RYO smokers in Australia was not available in the public domain.

Age, Gender and Smoking status	RYO Population data %
Daily Male Age 18-24	3.70
Daily Male Age 25-34	27.81
Daily Male Age 35-44	10.15
Daily Male Age 45-54	11.02
Daily Male Age 55-64*	3.21
Weekly Male Age 18-24	0.90
Weekly Male Age 25-44	0.98
Weekly Male Age 45-64*	0.98
Daily Female Age 18-24	5.89
Daily Female Age 25-34	9.55
Daily Female Age 35-44	6.67
Daily Female Age 45-54	7.63
Daily Female Age 55-64*	2.84
Weekly Female Age 18-24	0.53
Weekly Female Age 25-44	2.92
Weekly Female Age 45-64*	5.23

\*Note: Sample data only included 65 year olds however no population data was available for 65 years old only.  
 Data from Study 2 online total screened smokers were weighted to smoking population. RYO daily and weekly smoker profiles were then used to establish population data for this group.  
 ABS - 43640DO011\_20072008 National Health Survey: Summary of Results, 2007–2008 (Reissue) Released at 11:30 am (Canberra time) 23 Nov 2010



## 9.2 Quantitative Online Questionnaire

### SAMPLE QUOTAS (TOTAL 180)

#### AGE WITHIN GENDER:

Male 18-24 year olds	n=30
Male 25-44 year olds	n=30
Male 45-65 year olds	n=30
Female 18-24 year olds	n=30
Female 25-44 year olds	n=30
Female 45-65 year olds	n=30

#### AREA: (Soft quota based on S1c)

Sydney	2.	Regional NSW
Melbourne	4.	Regional VIC
Brisbane	6.	Regional QLD
Canberra	8.	Regional ACT
Adelaide	10.	Regional SA
Perth	12.	Regional WA
Darwin	14.	Regional NT
Hobart	16.	Regional TAS

#### SMOKER FREQ: (Count for updates from S4B cigarettes)

1. Daily (S4B\_1=1)
2. Weekly (S4B\_1 = 2)
3. Monthly (S4B\_1 = 3)

## INTRODUCTION

Thank you for taking the time to participate in this interesting survey. GfK Blue Moon is a social and market research company conducting this survey on behalf of the Australian Government, Department of Health and Ageing about a very important issue.

The information and opinions you provide will be treated as strictly confidential and will be used only for evaluation purposes. Your results will be grouped together with other respondents and your answers will not be traced back to you.



Depending on your answers, the survey should take around 15 minutes to complete. A time indicator will appear in the screen to show your progress through the survey.

**INSTRUCTIONS SCREEN**

Before we start, just a few simple instructions on completing this survey.

Please consider your answers carefully, you cannot go back during the survey. Please DO NOT use the 'back' button on your internet browser.

If you only partially complete the questionnaire, you can finish it later by clicking on the link in the original email invitation. This will take you back to where you were up to in the survey.

Should you have any technical difficulties through the survey, you can contact our helpdesk by clicking on the Member Services link located at the bottom right of your screen.

If you would like to check the legitimacy of this survey you can email [tobaccoplainpackaging@health.gov.au](mailto:tobaccoplainpackaging@health.gov.au)

**SCREENER**

ASK ALL

SC

IF S1a = 1, 2 OR 13 TERMINATE

S1a. In which of these age groups do you belong? *Please select one only*

Under 16 years old	1	CLOSE
16-17	2	
18-19	3	CHECK QUOTAS
20-24	4	
25-29	5	
30-34	6	
35-39	7	
40-44	8	
45-49	9	
50-54	10	
55-59	11	
60-65	12	
66 years and older	13	CLOSE

ASK ALL

SC

S1b. And are you? ....



Male  
Female  
Other

ASK ALL  
SC  
IF S1c=17 TERMINATE

S1c. And where do you currently live? *Please select one only*

Sydney  
Regional NSW  
Melbourne  
Regional VIC  
Brisbane  
Regional QLD  
Canberra  
Regional ACT  
Adelaide  
Regional SA  
Perth  
Regional WA  
Darwin  
Regional NT  
Hobart  
Regional TAS  
Outside of Australia



ASK ALL  
MR

IF S2a=1,2,3,8,9,10 OR 11 TERMINATE

Market research	1	TERMINATE
Advertising, marketing, public relations	2	
Media and journalism	3	
Water industry	4	CONTINUE
Energy industry	5	
Automotive manufacture or retail	6	
Teaching	7	
Medicine or healthcare	8	TERMINATE
Department of Health & Ageing	9	
Tobacco manufacturing, for a tobacco company, at a tobacconist	10	
An organisation dealing with health issues	11	CONTINUE
None of these [Exclusive]	12	

S2a. Do you or any of your close relations, work in any of the following industries? *Please select all that apply*

Market research	1	TERMINATE
Advertising, marketing, public relations	2	
Media and journalism	3	
Water industry	4	CONTINUE
Energy industry	5	
Automotive manufacture or retail	6	
Teaching	7	
Medicine or healthcare	8	TERMINATE
Department of Health & Ageing	9	
Tobacco manufacturing, for a tobacco company, at a tobacconist	10	
An organisation dealing with health issues	11	CONTINUE
None of these [Exclusive]	12	

ASK ALL  
SC

S2b. When was the last time you took part in market research, such as a survey, an interview or group discussions? *Please select one only*

In the last week	1	ASK S2C
In the last 2-4 weeks	2	
In the last 2-3 months	3	
In the last 4-6 months	4	SKIP TO S3A



In the last 7-12 months	5	
More than 12 months ago	6	

ASK IF S2B=1, 2 OR 3  
MR  
IF S2c=3 TERMINATE

S2c. And what was the research about? *Please select all that apply*

Food and Beverages (non-alcoholic)	1	
Alcoholic Beverages	2	
Tobacco or Cigarettes	3	TERMINATE
Health / Medicine	4	
Education	5	
Financial	6	
None of these	7	

ASK ALL  
MR

S3a. We also need to ensure we include a representative sample of the population, with regard to disabilities. Do any of the following apply to you? *Please select all that apply*

You have sight problems not fully corrected by glasses or contact lenses	1	THANK & CLOSE AFTER ASKING S4A
You are colour blind, colour different or have problems seeing different colours on a computer screen	2	THANK & CLOSE AFTER ASKING S4A
You have a mobility related disability e.g. arthritis, walking with a stick	3	CONTINUE
You have hearing problems	4	
None of the above	5	



NEXT SCREEN

The research we are conducting is about the packaging for roll your own cigarettes. We are looking for smokers and occasional smokers who are willing to speak honestly about how they feel about this.

Importantly, no one will judge you for smoking or tell you to quit.

ASK ALL

MR

IF S4a = ONLY 1, 3, 4 OR 5 (I.E. 2 IS NOT SELECTED) THEN TERMINATE (SEE SCRIPT BELOW)

IF S4a = 2 AND S3a = 1 OR 2, TERMINATE (SEE SCRIPT BELOW)

S4a. In the last 12 months, have you smoked any of the following...? *Please select all that apply*

Cigarettes (Manufactured)	1	
Roll-your-own cigarettes	2	NEED TO SELECT TO CONTINUE
Pipe tobacco	3	
Cigars	4	
Have not smoked any of these in the last 12 months	5	TERMINATE

TERMINATION FOR S4A IF DOES NOT SMOKE ROLL YOUR OWN CIGARETTES (S4A=2)

Thanks for your time. Unfortunately we are looking for roll your own cigarette smokers to participate in the research.

TERMINATION FOR SIGHT IMPAIRED OR COLOUR BLIND RESPONDENTS S3a=1 OR 2

Thanks for your time. Unfortunately we have enough people who fit your profile.



ASK ALL  
GRID BY COL  
SHOW ONLY COLUMNS FOR PRODUCTS SELECTED IN S4a

IF S4B\_2=3-4 TERMINATE (SEE SCRIPT BELOW)

S4b. And how frequently do you smoke...? Please select one answer per column only

<i>DP ONLY SHOW THOSE TYPES SELECTED IN S4A</i>	<i>S4B_1 CIGARETTES</i>	<i>S4B_2 RYO</i>	<i>S4B_3 PIPE</i>	<i>S4B_4 CIGAR</i>
<i>SR PER COLUMN</i>	Cigarettes (Manufactured)	Roll-your- own cigarettes	Pipe tobacco	Cigars
<i>Daily</i>	1	1	1	1
<i>Weekly</i>	2	2	2	2
<i>Less than weekly but at least once a month</i>	3	3	3	3
<i>Less than monthly</i>	4	4	4	4
<i>DP TO CLASSIFY</i>		<i>SMOKER= S4B_2=1-2</i>		

TERMINATION FOR S4B\_2 NOT =1-2 - IF DOES NOT SMOKE ROLL YOUR OWN CIGARETTES AT LEAST ONCE A WEEK (SMOKER) Thanks for your time. Unfortunately we are looking for regular cigarette smokers to participate in the research.

ASK IF SB4B\_2=1

S5a. On average, how many roll your own cigarettes do you smoke a day...?

Please type in the number of cigarettes you smoke per day

ASK IF S4B\_2=2

S5b. On average, how many roll your own cigarettes do you smoke a week...?

Please type in the number of cigarettes you smoke per week

No S5c

DP TO CREATE "CIGARETTES SMOKED PER WEEK" TOTAL (S5a\*7 + S5b)

MAIN SURVEY

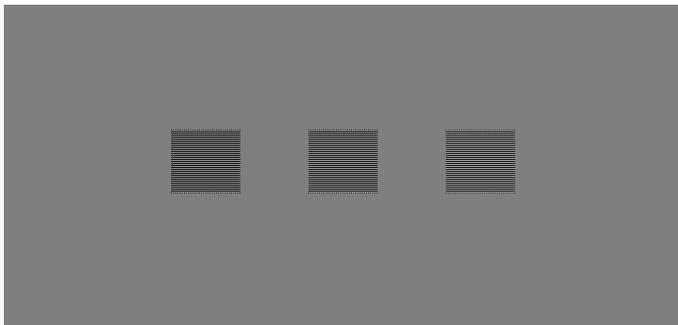
SCREEN COLOUR TEST

In this survey, we will be showing you different colours and are looking for your opinion on the different colours.

As every computer screen is different we would like to conduct some quick tests to check how colours look on your screen.

C1. Please have a look at this image. There should be three squares side by side on a grey background.

Now walk away from your screen and stand directly in front of your screen but at a distance (5 – 10 steps back).



Which of the following do you see? *Please select all that apply*

The square on the left is the darkest and the square on the right is the lightest

The middle square is almost the same colour as the grey background

All three squares are the same colour

None of the above

DP TO CLASSIFY  
 1 AND 2 – CORRECT GAMMA  
 1 ONLY OR 2 ONLY SEMI CORRECT GAMMA  
 3 OR 4 INCORRECT GAMMA

C2a. And looking at box below, within the dark grey box, how many shades or boxes do you see in each image?

Note, if you are in a bright room you may wish to dim the lights just for the next two questions.

Please select one response



Light / White boxes	C2a. Number of white/grey boxes	DP
10 boxes	10	Accurate highlight detail
9 boxes	9	
8 boxes	8	
7 boxes	7	
6 boxes	6	
5 boxes	5	
4 boxes	4	
3 boxes	3	
2 boxes	2	
1 boxes	1	

C2b. And looking at box below, within the dark grey box, how many shades or boxes do you see in each image? *Please select one response*



Dark/Grey boxes	C2b. Number of black/grey boxes	DP
10 boxes	10	Accurate shadow detail
9 boxes	9	
8 boxes	8	
7 boxes	7	
6 boxes	6	
5 boxes	5	
4 boxes	4	
3 boxes	3	
2 boxes	2	
1 boxes	1	

**PACK EVALUATION**

We are now going to show you some different pack ideas for roll your own cigarettes and ask you some questions about the packs shown.

**NEXT SCREEN**

The exercise will be repeated six times and you will be asked to compare the different packs shown on different measures.

DESIGN NOTE FOR THE RYO STUDY (NOT FOR SCRIPTING/ RESPONDENTS):

WE WILL BE MEASURING 5 MEASURES IN RYO STUDY

APPEAL

QUALITY OF CIGARETTES

HARM TO HEALTH



## EASE OF QUITTING

### NOTICEABILITY OF HEALTH WARNINGS

IN EACH OF THE FIRST 4 TASKS ABOVE RESPONDENTS WILL BE SHOWN 3 PACKS AND WILL GO THROUGH 6 EVALUATIONS PER MEASURE. AS SUCH, THERE WILL BE A TOTAL OF 3 X 6 TASKS TO COMPLETE PER MEASURE.

WE WILL MEASURE EACH OF THESE DIMENSIONS FOR FIVE BRANDS AND ONE PLAIN PACKAGE. AT THIS POINT, WE ENVISAGE THAT THE FOLLOWING BRANDS OF RYO TOBACCO ARE INCLUDED IN RESEARCH:

- Drum (Original);
- Champion (Ruby);
- Port Royal (Rum and Wine);
- Winfield (Blue); and
- Golden Virginia

Package 1 - Winfield Gold

Package 2- Champion

Package 3- Golden Virginia

Package 4- Drum

Package 5- White ox

Package 6- Mayfair (plain package)

ROTATE ORDER OF BRANDS SHOWN FOR RESPONDENTS.

ASK ALL

SELECT VERSION AS PER LEAST FULL AND SHOW PACKS IN DESIGNATED ORDER

GRID BY ROW

SAME ANSWER CANNOT BE SELECTED FOR MOST AND FOR LEAST

P1A. Looking at these four roll your own cigarette packs, please indicate which pack you think is the...

Most appealing overall and the Least appealing overall?

You should see four packs on the screen. If you don't see four packs please use the scroll function on the bottom of the screen to ensure you can see all the packs.



SET 1	IMAGE Pack 1	IMAGE Pack 2	IMAGE Pack 3
<u>Most</u> appealing overall Please select one			
<u>Least</u> appealing overall Please select one			

P1B. And which pack do you think is the...?

You should see four packs on the screen. If you don't see four packs please use the scroll function on the bottom of the screen to ensure you can see all the packs.

SET 2	IMAGE Pack 1	IMAGE Pack 2	IMAGE Pack 3
<u>Most</u> appealing overall Please select one			
<u>Least</u> appealing overall Please select one			

REPEAT P1B ANOTHER 4 TIMES AS PER EXPERIMENTAL DESIGN

ASK ALL

SELECT VERSION AS PER LEAST FULL AND SHOW PACKS IN DESIGNATED ORDER

GRID BY ROW

SAME ANSWER CANNOT BE SELECTED FOR HIGHEST AND FOR LOWEST



P2A. Now you are going to see another six screens with the same roll your own cigarette packs.

We'd now like you to indicate which pack looks like it contains the...

Highest quality and Lowest quality roll your own cigarettes?

You should see four packs on the screen. If you don't see four packs please use the scroll function on the bottom of the screen to ensure you can see all the packs.

SET 1	IMAGE Pack 1	IMAGE Pack 2	IMAGE Pack 3
<u>Highest</u> quality roll your own cigarettes Please select one			
<u>Lowest</u> quality roll your own cigarettes Please select one			

P2B. Now comparing these roll your own cigarette packs, which looks like it contains the...?

You should see four packs on the screen. If you don't see four packs please use the scroll function on the bottom of the screen to ensure you can see all the packs.

SET 2	IMAGE Pack 1	IMAGE Pack 2	IMAGE Pack 3
<u>Highest</u> quality roll your own cigarettes Please select one			
<u>Lowest</u> quality roll your own cigarettes Please select one			

REPEAT P2B ANOTHER 5 TIMES AS PER EXPERIMENTAL DESIGN

ASK ALL

SELECT VERSION AS PER LEAST FULL AND SHOW PACKS IN DESIGNATED ORDER

GRID BY ROW

SAME ANSWER CANNOT BE SELECTED FOR MOST AND FOR LEAST

P3A. Now you are going to see another six screens with the same roll your own cigarette pack.



We'd now like you to indicate which roll pack looks like it contains roll your own cigarettes that are the...

Most harmful and the Least harmful to health?

You should see three packs on the screen. If you don't see three packs please use the scroll function on the bottom of the screen to ensure you can see all the packs.

SET 1	IMAGE Pack 1	IMAGE Pack 2	IMAGE Pack 3	IMAGE Pack 4
Most harmful to health Please select one				
Least harmful to health Please select one				

P3B. Now comparing these roll your own cigarette packs, which looks like it contains tobacco that is the..?

You should see three packs on the screen. If you don't see three packs please use the scroll function on the bottom of the screen to ensure you can see all the packs.

SET 2	IMAGE Pack 1	IMAGE Pack 2	IMAGE Pack 3	IMAGE Pack 4
<u>Most</u> harmful to health Please select one				
<u>Least</u> harmful to health Please select one				

REPEAT P3B ANOTHER 4 TIMES AS PER EXPERIMENTAL DESIGN

ASK ALL

SELECT VERSION AS PER LEAST FULL AND SHOW PACKS IN DESIGNATED ORDER

GRID BY ROW

SAME ANSWER CANNOT BE SELECTED FOR MOST AND FOR LEAST

P4A. Now you are going to see another six screens with the same roll your own cigarette pack.

We'd now like you to indicate which pack looks like it would contain roll your own cigarettes that would be...

Easiest to quit and Hardest to quit



You should see three packs on the screen. If you don't see three packs please use the scroll function on the bottom of the screen to ensure you can see all the packs.

SET 1	IMAGE Pack 1	IMAGE Pack 2	IMAGE Pack 3	IMAGE Pack 4
<u>Easiest</u> to quit Please select one				
<u>Hardest</u> to quit Please select one				

P4B. Now comparing these roll your own cigarette packs, which pack looks like it contains cigarettes that would be..?

You should see three packs on the screen. If you don't see three packs please use the scroll function on the bottom of the screen to ensure you can see all the packs.

SET 2	IMAGE Pack 1	IMAGE Pack 2	IMAGE Pack 3	IMAGE Pack 4
<u>Easiest</u> to quit Please select one				
<u>Hardest</u> to quit Please select one				

REPEAT P4B ANOTHER 4 TIMES AS PER EXPERIMENTAL DESIGN

P5. Now looking at these six cigarette packs, we'd like you to indicate how noticeable the graphic health warnings are on each of these packs. That is, whether there are any differences in how much the graphic health warning stands out on these different packs.

SHOW THE SIX IMAGES SIDE BY SIDE - ROTATE ORDER.

To do this, we'd like you to allocate a score based on the notice-ability of each pack so that all scores add to 100. For example:

If you feel the graphic warning on one pack stands out much more than others, you might allocate a score of 50 for that pack, and 10 for others.



If you feel the graphic warning on two packs stand out much more than the others, you might allocate a score of 30 for those two packs, and 10 for others.

RANDOMISE ORDER OF PACKS SHOWN - SHOW IN GRID BELOW	Score
	Must total 100 (SHOW CUMULATIVE SUM)

### ATTITUDES TO SMOKING

We just have a few more questions about your general attitude towards smoking.

ASK ALL

SC

A1. Have you ever tried to quit smoking before? *Please select one only*

Yes, quit once before	1
Yes, quit twice before	2
Yes, quit three times	3
Yes, quit four times	4
Yes, quit five times or more	5
No, have never tried to quit before	6
I don't really consider myself a smoker	7

ASK ALL

SC

A2. Which of these statements best describes you? *Please select one only*

You are planning to quit smoking in the next 30 days	1
You are thinking about quitting smoking within the next six months	2
You might quit, but not within the next six months	3
You will continue to smoke	4
Don't know	5



ASK ALL  
GRID BY ROW

A3. Here are a few statements about smoking. For each please indicate whether you personally strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree with each statement. There are no right or wrong answers here, we are interested in your personal opinion.

	RANDOMISE STATEMENT	Strongly agree	Agree	Neither	Disagree	Strongly disagree	Don't know (DON'T READ)
1	Before today, I had heard about the Government initiative to introduce 'plain packaging' for tobacco products	5	4	3	2	1	9
2	I approve of the idea of plain packaging for roll your own	5	4	3	2	1	9
3	I support Government initiatives to try to reduce smoking in Australia	5	4	3	2	1	9
4	There is nothing the Government could do to encourage me to quit smoking	5	4	3	2	1	9
5	The Government should do more to support people to quit smoking	5	4	3	2	1	9

DEMOGRAPHICS

Now finally, we have a few more questions about you for classification purposes only.

ASK ALL  
SC

D1. Which one of the following brands do you mainly smoke? *Please select one only*

- Bali Shag
- Bank
- Champion
- Dr Pat
- Drum
- Escort
- Golden Virginia
- Holiday
- Horizon
- Manitou
- Old Hoborn
- Orlando



Port Royal  
Stockmans  
White Ox  
Winfield  
Other (specify)  
No main or regular brand

ASK ALL  
SC

D1a. And which size do you mainly smoke? *Please select one only*

30 grams  
50 grams  
Other (Specify)  
No main or regular variant

ASK ALL  
SC

D2. What is your employment status? *Please select one only*

Working full time  
Working part timer  
Unemployed  
Full time student  
House duties  
Retired  
Other

ASK ALL  
SC

D3. What is the highest level of education you have? *Please select one only*

No schooling  
Primary school  
Year 10 / 4th form / School Certificate  
Year 12 / 6th form / Higher School Certificate  
TAFE or trade qualification  
Any type of university degree  
Other (specify)



ASK ALL  
SC

D6. Are there any languages other than English spoken in your household? *Please select one only*

- Yes (Specify)
- No
- Don't Know
- Would rather not answer

ASK ALL  
SC

D7. And are you of Aboriginal or Torres Strait Islander descent? *Please select one only*

- Yes
- No
- Don't Know
- Would rather not answer

ASK ALL  
SC

D8. Which of these broad income bands best represents the total annual income for your household before tax? *Please select one only*

- Would it be...
- Less than \$31,000
- Between \$31,000 and \$59,999
- Between \$60,000 and \$79,999
- Between \$80,000 and \$99,999
- Between \$100,000 and \$149,999
- \$150,000 or more
- Don't Know
- Refused

TYPE	DATE	NODE	ACTION REQUIRED	SCRIPTIN G STATUS	PM CHECK



### 9.3 Stimulus (Quantitative and Qualitative)

A total of six pack designs were tested including five RYO branded packs and a plain packaging (drab dark brown) mock up pack with the name 'Mayfair'. The brands tested were specified by the Department.

Each pack featured the same graphic health warning, "Smoking causes mouth and throat cancer", which covered 75% of the front of pack.

The six pack images that were tested are shown below.



Winfield Gold



Champion



Golden Virginia



Drum



White Ox



Mayfair (plain packaging mock up)

## 9.4 Quantitative Maximum Difference Scaling Question Example

### Maximum Difference (Max-Diff) Technique

Maximum Difference Scaling (Max-Diff), also known as 'Best-Worst' scaling, is a technique whereby respondents are shown a subset of the possible combinations of items being tested in the study. They are asked to indicate the best and worst items (or most and least important). This approach can be thought of as a more sophisticated extension of the Method of Paired Comparisons where each item can be compared to every other item being tested. Max-Diff is appropriate when researching a larger number of test items.

Consider a set in which a respondent evaluates four items, A, B, C and D. If the respondent says that A is best and D is worst, these two responses inform us of five of six possible implied paired comparisons:  $A > B$ ,  $A > C$ ,  $A > D$ ,  $B > D$ ,  $C > D$  where “>” means “is more important/preferred than”. The only paired comparison that we cannot infer is B vs. C.

Maximum difference scaling questionnaires are relatively easy for most respondents to understand. Furthermore, humans are much better at judging items at extremes than in discriminating among items of middling importance or preference. And since the responses involve choices of items rather than expressing strength of preference, there is no opportunity for scale use bias. This is an extremely valuable property for cross-cultural research studies.

### Example of the Maximum Difference (Max-Diff) Scaling Question

P1A. Looking at these three roll your own cigarette packs, please indicate which pack you think is the...

Most appealing overall and the Least appealing overall?

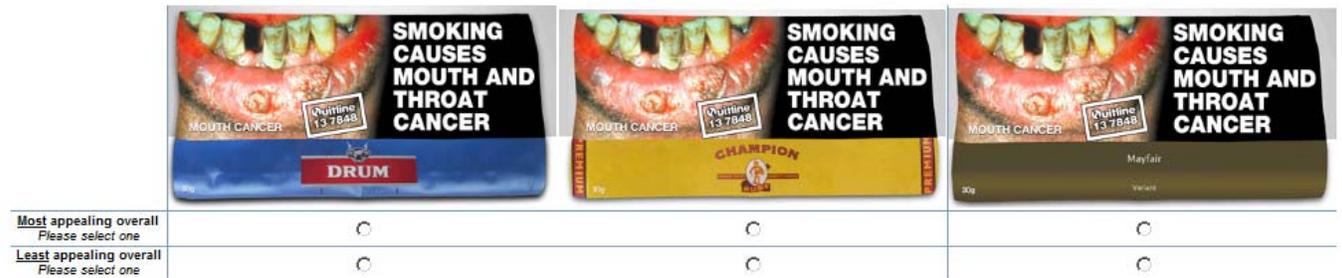
You should see three packs on the screen. If you don't see three packs please use the scroll function on the bottom of the screen to ensure you can see all the packs.

Most appealing overall Please select one	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Least appealing overall Please select one	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

P1B. And which pack do you think is the...?

Most appealing overall and the Least appealing overall?

You should see three packs on the screen. If you don't see three packs please use the scroll function on the bottom of the screen to ensure you can see all the packs.



This exercise was repeated for each dimension tested showing a different combination of the eight packs.

The experimental design ensured that the packs shown and the order in which they were shown were rotated to reduce order bias. The experimental design also ensured that all pack options would be compared an equal number of times in the least number of iterations.<sup>9</sup> This was important to avoid overburdening respondents with a large number of repetitive tasks which could result in respondent fatigue and impact the quality of respondents' answers.

<sup>9</sup> Note it is not necessary that each respondent actually compares all packs against each other. For example, in the case where there are four test items, A, B, C and D. If the respondent says that A is best and D is worst, these two responses inform us on five of six possible implied paired comparisons: A>B, A>C, A>D, B>D, C>D where ">" means "is more 'better' or 'more than'". The only paired comparison that cannot be inferred is B vs. C. An experimental design is developed to ensure that comparison data between all items is available.



## 9.5 Quantitative Respondent Smoking Behaviour and Profiles

### Respondent Smoking Behaviour

	Study RYO Total (n=209) %	Age 18-24 years (n=61) %	Age 25-44 years (n=79) %	Age 45-65 years (n=69) %
<b>Frequency of smoking RYO cigarettes (%)</b>				
Daily	88	87	93	80
Weekly	12	13	7	20
<b>Main RYO brand (%)</b>				
Winfield	24	46	21	22
Champion	22	19	21	22
Drum	20	1	21	24
Port Royal	6	6	7	5
Horizon	5	13	5	3
White Ox	4	0	1	10
Holiday	2	4	3	1
Bank	2	1	3	1
Golden Virginia	2	1	4	0
Dr Pat	2	0	3	1
Stockmans	0	1	0	0
Escort	0	0	0	0
Bali Shag	0	0	0	0
Manitou	0	0	0	0
Old Hoborn	0	0	0	0
Orlando	0	0	0	0
Other (specify)	8	4	8	8
No main or regular brand	3	3	4	2

Respondent Demographic Profile

	Study RYO Total (n=209) %	Age 18-24 years (n=61) %	Age 25-44 years (n=79) %	Age 45-65 years (n=69) %
<b>Gender (%)</b>				
Male	59	42	67	49
Female	41	58	33	51
<b>Employment status (%)</b>				
Working full time	47	27	54	40
Working part timer	18	19	18	19
Unemployed	7	15	7	4
Full time student	9	25	9	1
House duties	9	7	9	9
Retired	8	0	1	24
Other	3	6	2	3
<b>Educational attainment (%)</b>				
No schooling qualifications	0	0	0	0
Primary school	1	1	0	4
Year 10 / 4th form / School Certificate	16	13	14	20
Year 12 / 6th form / Higher School Certificate	20	25	18	22
TAFE or trade qualification	27	41	23	30
Any type of university degree	30	21	36	24
Other	6	0	10	0
No Answer	0	0	0	0
<b>Aboriginal or Torres Strait Islander descent (%)</b>				
Yes, of Aboriginal or Torres Strait Islander descent	1	0	1	0
No, not of Aboriginal or Torres Strait Islander descent	98	97	99	96
Would rather not answer	0	3	0	0
Don't Know	1	0	0	4
<b>Language other than English</b>				



	Study RYO Total (n=209) %	Age 18-24 years (n=61) %	Age 25-44 years (n=79) %	Age 45-65 years (n=69) %
<b>spoken at home (%)</b>				
Yes	9	11	11	4
No	90	84	89	96
Would rather not answer	1	5	0	1
<b>Annual Household Gross Income (%)</b>				
Less than \$31,000	16	22	12	20
Between \$31,000 and \$59,999	19	21	17	22
Between \$60,000 and \$79,999	15	7	14	20
Between \$80,000 and \$99,999	19	21	24	9
Between \$100,000 and \$149,999	13	5	15	12
\$150,000 or more	6	6	7	4
Refused	10	13	9	10
Don't Know	2	4	1	3



## 9.6 Qualitative Discussion Guide

### 1 Introduction (5 mins)

Purpose of section is to introduce topic of discussion, explain the groups process to participants and obtain some brief demographics about respondents.

- Introduce self
- Explain confidentiality
- Explain project background:

Research is on packaging of tobacco products. (Moderator to keep this deliberately broad as to what parts of the packaging that we will be looking at specifically. We want to gain some spontaneous reactions first).

Not here to discuss or judge their smoking behaviour, just to get their views on some ideas about the packaging.

Participant introduction:

- Name
- Family, occupation

### 2 Understanding of existing smoking and purchase behavior (10 mins)

Ask about smoking habits - do they only smoke the RYO? Do they smoke any other tobacco products, manufactured cigarettes, cigarillos?

- Has that always been the case? Or has the behavior changed over time?
- Where do they normally purchase their rolling tobacco?
- Tobacconists? supermarket?
- How? In person? Over the Internet?
- What is it that they like about smoking RYO over other tobacco products?
- Describe a typical RYO smoker?
- Prompt with comparison of manufactured cigarette smoker and cigar smokers if needed?

### 3 Exercise 1 – Self complete questionnaire (10mins)

Provide respondents with quant questionnaire. Images of RYO tobacco to be included within the questionnaire.

(includes 5 brands plus plain pack Mayfair).



#### 4 Relationship with brands (20 mins)

What brand of RYO do they themselves smoke?

- Any other brands? Why and when would they change brands/ not ever change brands of RYO?

What other brands do they know/ are aware of apart from those we had in the questionnaire?

- List out spontaneous replies of brands - ?
- How do they see them as different?
- What are the differences in the type of people that may smoke the different brands?
- If having difficulty in articulating, ask would they ever smoke X brand? Why / why not? Where would they be if they were smoking X brand? Who would they be with?

Refer back to questionnaire, discuss associations with each:

Appeal:

- Which is the most appealing from these? Why?
- Which is the least appealing from these? Why?
- What about the others?

Quality of tobacco

- Which is the highest quality RYO tobacco ? Why?
- Which is the lowest quality RYO tobacco ? Why?
- What about the others?

Harmful to health

- Which would be the most harmful to your health? Why?
- Which would be the least harmful to your health? Why?
- What about the others?

Ease of quitting

- Which would be the hardest to give up ? Why?
- Which would be the easiest to give up? Why?
- What about the others?



Graphic health warning

- Which one stands out the most?
- The least?
- What about the others?

For each brand:

- What type of person would be smoking this tobacco brand ? Prompt with where would they be smoking this type of tobacco brand? Who with?

## 5 Exercise 2 – Reactions to Mock Up of Health Warnings (20 mins)

*Introduce small product packaging mock ups of little cigars / cigarillos<sup>10</sup> and RYO tins (introduce as letter options – label each in a discrete place) Hand to groups and ask them to handle and look over and pass on to next respondent (ask them to complete Self Complete – Exercise 2).*

Which pack from A and B (cigarillo options) has the strongest health warning message?

Which pack from C,D, E (RYO tin options) has the strongest health warning message?

*Take note of how they look at the warnings and so on.*

Then discuss

- Which has the strongest health warning?
- Why do you think that is?
- Which ones would you be more likely to read?
- Which is the most noticeable health warning for you?
- How are this different from what you are used to?
  - Probe in detail about the spontaneous replies, then prompt with:
  - For each of the different layout of the health messages?
  - What do you notice first when looking at it – image/ statement /both?

Size of the health message?

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<sup>10</sup> The research was conducted in conjunction with research on graphic health warnings, for which respondents were shown mock ups of little cigar / cigarillo packs within the group discussions. Findings on these are discussed in a separate report for graphic health warnings.

## 6 Exercise 4 – Reactions to Mock Up of Bidi packs (10 mins)<sup>11</sup>

*Introduce small product packaging mock ups of bidis (introduce as letter options – label each in a discrete place) Hand to groups and ask them to handle and look over and pass on to next respondent (ask them to complete Self Complete – Exercise 4).*

Which pack from F, G, H (Bidi options) has the strongest health warning message?

*Take note of how they look at the warnings and so on.*

Then discuss

- Which has the strongest health warning?
- Why do you think that is?
- Which ones would you be more likely to read?
- Which is the most noticeable health warning for you?

Go through for each layout option?

- Can you understand the image? The message?
- Probe on difficulties in comprehension to determine if the due to layout
- What do you notice first when looking at it – image/ statement /both?

## 7 Exercise 3 – Graphic health warnings for cigarillos (10-15 mins) (Self complete – Exercise 3)

Let them know that we know that they are not cigar smokers, but we'd like their views on some of the graphic health warnings that may be used on packets of little cigars

Show image board of the revised graphic health warnings for cigars (warning message and graphics only – not more than three per board – final number to be provided by the Department)

- Which of the messages make you stop and think? Why?
- Which of the message make you think about your own smoking / friend or family smoking? Why?

Then for each ask about overall message:

- Understanding?
- Credibility of headline? Of image?

<sup>11</sup> The research was conducted in conjunction with research on graphic health warnings, for which respondents were shown mock ups of Bidi packs within the group discussions. Findings on these are discussed in a separate report for graphic health warnings.



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- Any changes to the message to make it more impactful?

8 Summing up: (2 mins)

Out of everything you have seen today, what one thing has had most impact on you?



10 APPENDIX B: CIGARILLOS/LITTLE CIGARS

10.1 Quantitative Self Completion Questionnaire

Thank you for your time today to participate in this important survey. GfK Blue Moon is a social and market research company conducting this survey on behalf of the Australian Government, Department of Health and Ageing, about a very important issue.

The information and opinions you provide will be treated as strictly confidential and will be used only for evaluation purposes. Your results will be grouped together with other respondents and your answers will not be traced back to you.

Depending on your answers, the survey should take around 8-10 minutes to complete.

Please read all the questions carefully and follow the instructions after each question.

S1C. In which of these age groups do you belong?

Please circle one response only.

Note, if you are younger than 18 years old or older than 64 years please let the interviewer know.

18-19	1
20-21	2
22-24	3
25-29	4
30-34	5
35-39	6
40-44	7
45-49	8
50-54	9
55-59	10
60-64	11

S1D. And are you? ....

Please circle one response only.

Male	1
Female	2



S4b. How frequently do you smoke cigarillos? Do you smoke...?

Please circle one response only.

	Please circle one response only.	
Every day	1	
Every week	2	
Less than every week	3	Please see interviewer if you smoke less than every week

### PACK EVALUATION

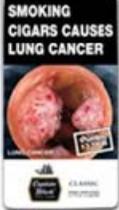
We are now going to show you some different pack ideas for cigarillos and ask you some questions about the packs shown.

You will be shown six different cigarillo packs for each question. Each time, we'd like you to rank the packs from best to worst on different aspects like appeal, quality and so on.



P1A. Looking at these six cigarillo packs, please rank each of these packs in terms of appeal.

Please write the number '1' next to the pack you think is 'most appealing' and '2' next to the pack you think is 'second most appealing' and so on until all the packs have a number from 1 to 6 next to it.

Rotation 1 (NSW/QLD)	<i>Rank from 1 to 6...</i>
<b>Pack 1</b> 	
<b>Pack 2</b> 	
<b>Pack 3</b> 	
<b>Pack 4</b> 	
<b>Pack 5</b> 	
<b>Pack 6</b> 	

P2A. Looking at these six cigarillo packs, please rank each of these packs in terms of quality of the cigarillos in each pack.

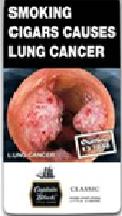
Please write the number '1' next to the pack you think contains the highest quality cigarillos and '2' next to the pack you think has the second highest quality cigarillos and so on until all the packs have a number from 1 to 6 next to it.

Rotation 1 (NSW/QLD)	<i>Rank from 1 to 6...</i>
<b>Pack 1</b> 	
<b>Pack 2</b> 	
<b>Pack 3</b> 	
<b>Pack 4</b> 	
<b>Pack 5</b> 	
<b>Pack 6</b> 	



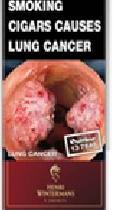
P3A. Looking at these six cigarillo packs, please rank each of these packs in terms of the harm to health.

Please write the number '1' next to the pack you think contains cigarillos which are most harmful to health and '2' next to the pack you think contains the cigarillos which are second most harmful to health and so on until all the packs have a number from 1 to 6 next to it.

Rotation 1 (NSW/QLD)	<i>Rank from 1 to 6...</i>
<b>Pack 1</b> 	
<b>Pack 2</b> 	
<b>Pack 3</b> 	
<b>Pack 4</b> 	
<b>Pack 5</b> 	
<b>Pack 6</b> 	

P4A. Looking at these six cigarillo packs, please rank each of these packs in terms of how hard it would be to quit.

Please write the number '1' next to the pack you think contains cigarillos which are hardest to quit and '2' next to the pack you think contains cigarillos that are the second hardest to quit and so on until all the packs have a number from 1 to 6 next to it.

Rotation 1 (NSW/QLD)	<i>Rank from 1 to 6...</i>
<b>Pack 1</b> 	
<b>Pack 2</b> 	
<b>Pack 3</b> 	
<b>Pack 4</b> 	
<b>Pack 5</b> 	
<b>Pack 6</b> 	



P5A. Looking at these six cigarillo packs, please rank each of these packs in terms of health warning noticeability.

Please write the number '1' next to the pack you think has the health warning that stands out the most (most noticeable) and so on until all the packs have a number from 1 to 6 next to it.

Rotation 1 (NSW/QLD)	<i>Rank from 1 to 6...</i>
Pack 1 	
Pack 2 	
Pack 3 	
Pack 4 	
Pack 5 	
Pack 6 	



A3. Here are a few statements about smoking. For each please indicate whether you personally strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree with each statement. There are no right or wrong answers here, we are interested in your personal opinion.

Please select one response per statement

	RANDOMISE STATEMENT	Strongly agree	Agree	Neither	Disagree	Strongly disagree	Don't know
1	Before today, I had heard about the Government initiative to introduce 'plain packaging' for tobacco products	5	4	3	2	1	9
2	I approve of the idea of plain packaging for cigarillos	5	4	3	2	1	9
3	I support Government initiatives to try to reduce smoking in Australia	5	4	3	2	1	9
4	There is nothing the Government could do to encourage me to quit smoking	5	4	3	2	1	9
5	The Government should do more to support people to quit smoking	5	4	3	2	1	9

Now finally, we have a few more questions about you for classification purposes only.

D1. Which one of the following brands do you mainly smoke?

Please select one only

Wee Willem

Cafe Creme

Henri Wintermans

Captain Black

Davidoff Cigarillo

Dunhil

Other (please specify \_\_\_\_\_)

No main or regular brand



### 10.2 Quantitative Self Completion Respondent Profile

	Cigarillos Total (n=30) %
<b>Gender</b>	
Male	77
Female	23
<b>Age</b>	
18-24	0
25-44	70
45-64	30
<b>Frequency of smoking cigarillos</b>	
Every day	20
Every week	77
Less than every week	3
<b>Brand Smoked</b>	
Cafe Creme	30
Davidoff Cigarillo	20
Captain Black	10
Dunhill	10
Wee Willem	3
Henri Wintermans	3
Other (please specify)	20

10.3 Stimulus (Quantitative and Qualitative)

Rotation 1 (NSW/QLD)	
Pack 1	
Pack 2	
Pack 3	
Pack 4	
Pack 5	
Pack 6	



## 10.4 Qualitative Discussion Guide

### 1 Introduction (5 mins)

Purpose of section is to introduce topic of discussion, explain the groups process to participants and obtain some brief demographics about respondents.

- Introduce self
- Explain confidentiality
- Explain project background:

Research is on packaging of tobacco products. (Moderator to keep this deliberately broad as to what parts of the packaging that we will be looking at specifically. We want to gain some spontaneous reactions first).

Not here to discuss or judge their smoking behaviour, just to get their views on some ideas about the packaging.

Participant introduction:

- Name
- Family, occupation

### 2 Understanding of existing smoking and purchase behavior (5 mins)

Ask about smoking habits - do they only smoke the little cigars? Do they smoke any other tobacco products, cigarettes?

- Has that always been the case? Or has the behavior changed over time?
- Is it like smoking cigarettes? Do you inhale as you would with cigarettes?

How many would they smoke a day? Where would they be when they smoked them? how often would they smoke cigars?

How do they normally purchase their little cigars?

- Tobacconists? Cigar importer?
- How? In person? Over the Internet?

What is it that they like about smoking little cigar / cigarillos over other tobacco products?

Describe a typical little cigar /cigarillo smoker?

- Prompt with comparison of cigarette smokers and premiums cigar smokers if needed?



### 3 Exercise 1 – Self complete questionnaire to gather quant measure (10mins)

Provide respondents with quant questionnaire. Images of cigarillos to be included within the questionnaire

(includes 5 brands plus plain pack Mayfair).

### 4 Relationship with brands (20 mins)

What brand of little cigar /cigarillo do they themselves smoke?

- Any other brands? Why and when would they change brands/ not ever change brands of little cigar /cigarillo?

What other brands do they know/ are aware of apart from those we had in the questionnaire?

- List out spontaneous replies of brands - ?
- How do they see them as different?
- What are the differences in the type of people that may smoke the different brands?
- If having difficulty in articulating, as would they ever smoke X brand? Why / why not? Where would they be if they were smoking X brand? Who would they be with?

Refer back to questionnaire, discuss associations with each:

Appeal:

- Which is the most appealing from these? Why?
- Which is the least appealing from these? Why?
- What about the others?

Quality of tobacco

- Which is the highest quality cigar? Why?
- Which is the lowest quality cigar? Why?
- What about the others?

Harmful to health

- Which would be the most harmful to your health? Why?
- Which would be the least harmful to your health? Why?
- What about the others?



#### Ease of quitting

- Which would be the hardest to give up ? Why?
- Which would be the easiest to give up? Why?
- What about the others?

#### Graphic health warning

- Which one stands out the most?
- The least?
- What about the others?

#### For each brand:

- What type of person would be smoking these cigars? Prompt with where would they be smoking this type of cigar? Who with?

#### 5 Exercise 2 – Reactions to Mock Up of Health Warnings (15 mins)

Introduce small product packaging mock ups of little cigars / cigarillos and RYO<sup>12</sup> tins (introduce as letter options – label each in a discrete place) Hand to groups and ask them to handle and look over and pass on to next respondent (ask them to complete Self Complete – Exercise 2).

Which pack from A and B (cigarillo options) has the strongest health warning message?

Which pack from C,D, E (RYO tin options) has the strongest health warning message?

Take note of how they look at the warnings and so on.

#### Then discuss

- Which has the strongest health warning?
- Why do you think that is?
- Which ones would you be more likely to read?
- Which is the most noticeable health warning for you?
- How are this different from what you are used to?
  - Probe in detail about the spontaneous replies, then prompt with:
  - For each of the different layout of the health messages?
  - What do you notice first when looking at it – image/ statement /both?

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<sup>12</sup> The research was conducted in conjunction with research on graphic health warnings, for which respondents were shown mock ups of RYO packs within the group discussions. Findings on these are discussed in a separate report for graphic health warnings.



- Size of the health message?

## 6 Exercise 4 – Reactions to Mock Up of Bidi packs<sup>13</sup> (10 mins)

*Introduce small product packaging mock ups of bidis (introduce as letter options – label each in a discrete place) Hand to groups and ask them to handle and look over and pass on to next respondent (ask them to complete Self Complete – Exercise 4).*

Which pack from F, G, H (Bidi options) has the strongest health warning message?

Take note of how they look at the warnings and so on.

Then discuss

- Which has the strongest health warning?
- Why do you think that is?
- Which ones would you be more likely to read?
- Which is the most noticeable health warning for you?

Go through for each layout option?

- Can you understand the image? The message?
- Probe on difficulties in comprehension to determine if the due to layout
- What do you notice first when looking at it – image/ statement /both?

## 7 Exercise 3 – Graphic health warnings for cigarillos (30 mins) (Self complete – Exercise 3)

Show image board of the revised graphic health warnings for cigars ( warning message and graphics only – not more than three per board – final number to be provided by the Department)

- Which of the messages make you stop and think? Why?
- Which of the messages make you think about your own smoking / friend or family smoking? Why?

Then for each briefly ask about overall message:

- Understanding?
- Credibility of headline? Of image?
- Any changes to the message to make it more impactful?

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<sup>13</sup> The research was conducted in conjunction with research on graphic health warnings, for which respondents were shown mock ups of Bidi packs within the group discussions. Findings on these are discussed in a separate report for graphic health warnings.



## 8 Exercise 3 cont - Detailed discussion on warnings and graphics

*Hand out A4 booklet containing headlines, images and copy*

*Moderator to explain that we are going to discuss each message in detail now.*

*Rotate starting point of messages.*

Ask respondents to refer to the same message in their booklet

- What stands out to you about this message? (image, headline, content of message once they read it) Why?
- What is the message of the health warning? (Comprehension)
- Do they believe it? Why? Why not?
- Does it have any new information?
- How does it make them feel?

Reactions to the headline?

- Does it contain any new information?
- Do you believe the headline?

Reactions to the image

- What does the picture say to you?/What does it communicate?
- Does it make sense?
- Does it portray new information?
- Is it credible?

Is there anyone that does NOT think the picture looks real/convincing (where relevant)?

- Does they fit with the headline?

Reactions to the copy

- Does it help explain the headline and/or picture?
- Does the copy make the health warning more believable?
- Would it impact on your attitude to smoking? If so, how?
  - does it have any new information in it?
  - Is it believable?
  - What about the language? Is there anything you did not understand?



- How would you describe its tone?

For overall message, what changes would you make?

9 Summing up: (2 mins)

Out of everything you have seen today, what one thing has had most impact on you?



## 11 APPENDIX C: PREMIUM CIGARS

### 11.1 Qualitative Discussion Guide

#### 1 Introduction (5 mins)

Purpose of section is to introduce topic of discussion, explain the process to the interviewees and obtain some brief demographics about respondents.

- Introduce self
- Explain confidentiality
- Explain project background:
- Research is the issue of plain packaging of tobacco products. (Moderator note – interviewees will have been told it is on this topic, but still keep broad at this stage)
- Not here to discuss or judge their smoking behaviour, just to get their views on some ideas about the packaging.

Participant introduction:

- Name
- Family, occupation

#### 2 Views on plain packaging of tobacco products (5mins)

Purpose of discussion is just to have a general warm up and establish rapport with respondent. Let them lead direction in this section.

- What do they know about it?
- What do they think?
- What smokers do they think it might effect? Why?

#### 3 Understanding of existing smoking and purchase behavior (5 mins)

Ask about smoking habits - do they only smoke cigars? Do they smoke any other tobacco products, cigarettes?

- Has that always been the case? Or has the behavior changed over time?
- How many cigars / how often would they smoke cigars? Do you inhale you would with cigarettes?
- Where would they normally smoke cigars? Prompt on all locations – at home, in lounges, in bars?
- How do they normally purchase their cigars?
- Boxes of cigars? Single purchases?



- Where from? Tobacconists? Cigar importer? Lounge?
- How? In person? Over the Internet?
- How are the cigars packaged when they are purchased?
- The boxes?
- The single sale cigars?
- Prompt with in a tube with branding? In plastic wrap? In a bag? Does the wrapping have branding on it?

Are the single sale cigars ever not packaged?

- I.e., from humidor to hand immediately?

#### 4 Relationship with brands (5 mins)

What is it that they like about smoking cigars over other tobacco products?

Describe a typical cigar smoker?

- Prompt on where and with who they normally smoke cigars if unable to articulate?
- What brand of cigars do they themselves smoke?
- Any other brands? Why and when would they change brands/ not ever change brands of cigar?
- What other brands do they know/ are aware of?
- List out spontaneous replies of brands?
- How do they see them as different?
- What are the differences in the type of people that may smoke the different brands?
- If having difficulty in articulating, as would they ever smoke X brand? Why / why not? Where would they be if they were smoking X brand? Who would they be with?

What is the purpose of the band on cigars?

- Is it only to show the brand? Do they leave it on? Take it off?



## 5 Exercise 1 – Image board of different brand packaging for single sale cigars (10mins)

Show image boards of the 6 brands of single sale premium cigars (includes 5 brands plus plain pack Mayfair).

Using quant measures as a prompt, discuss associations with each:

Appeal:

- Which is the most appealing from these? Why?
- Which is the least appealing from these? Why?
- What about the others?

Quality of tobacco

- Which is the highest quality cigar? Why?
- Which is the lowest quality cigar? Why?
- What about the others?

Harmful to health

- Which would be the most harmful to your health? Why?
- Which would be the least harmful to your health? Why?
- What about the others?

Ease of quitting

- Which would be the hardest to give up ? Why?
- Which would be the easiest to give up? Why?
- What about the others?

Graphic health warning

- Which one stands out the most?
- The least?
- What about the others?

For each brand:

- What type of person would be smoking these cigars? Prompt with where would they be smoking this type of cigar? Who with?



Introduce board that shows a cigar with a plain packaging band and two other cigars with branded bands.

- Are these cigars different in any way? How?
- Probe with – which is the more appealing? Which has better quality tobacco? Which is the more premium cigar? Which is the least?

## 6 Exercise 2 – Reactions to Mock Up of Health Warnings (10mins)

Introduce small product packaging mock ups. Hand to respondent and ask them to handle and look over.

Take note of how they look at the warnings and so on.

Then compare, gaining responses for each and collectively.

- What do you notice when looking at the packet?
- What stands out the most on the packs?
- What do you think about the health warnings on the pack?
- Which one of the two would you be more likely to read?
- Which one stands out the least?
- Why do you think that is?
- For each, what do you notice first when looking at it – image/ statement /both?
- Size of the health message?

## 7 Exercise 3 – Graphic health warnings for cigars (15 mins)

Show image board of the revised graphic health warnings for cigars ( warning message and graphics only – not more than three per board – final number to be provided by the Department)

- Which from these would you notice?
- Which are the three with the greatest potential to make you stop and think about your cigar smoking behavior if you if you saw it? Why?
- Which are the three with that may prompt any concern about your cigar smoking behavior if you saw it? Why?

Hand out A4 booklet containing headlines, images and copy, and ask that we discuss in more detail.

What stands out to you about this message? (image, headline, content of message once they read it) Why?

- What is the message of the health warning? (Comprehension)



- Do they believe it? Why? Why not?
- Does it have any new information?
- What emotion does it make them feel?
- Specific reactions to the headline?
- Specific reactions to the image?
- Credibility?
- Headline / image fit?

#### Reactions to the copy

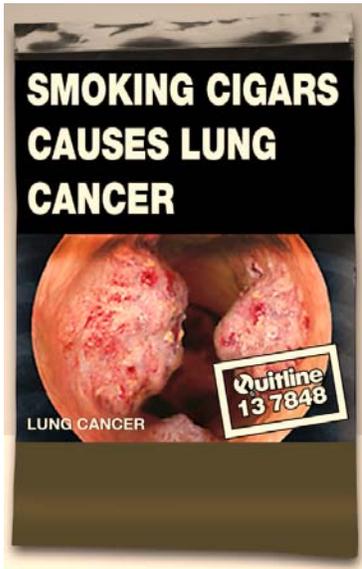
- Does it help explain the headline and/or picture?
- Does the copy make the health warning more believable?
- For overall message, what changes would you make? #
- Would it impact on your attitude to smoking? If so, how?

#### 8 Summing up: (2 mins)

- Out of everything you have seen today, what one thing has had most impact on you?

### 11.2 Qualitative Stimulus

Cigar Bag (On A3 Board)



Cigar tubes (3 per A3 Board)





12 APPENDIX D: QUALITATIVE RECRUITMENT SCREENER

1a. Do you or any of your close relations, work in any of the following industries?

Market research	1	TERMINATE
Advertising, marketing, public relations	2	
Media and journalism	3	
Water industry	4	CONTINUE
Energy industry	5	
Automotive manufacture or retail	6	
Teaching	7	
Medicine or healthcare	8	TERMINATE
Department of Health & Ageing	9	
Tobacco manufacturing, for a tobacco company, at a tobacconist	10	
An organisation dealing with health issues	11	
Pharmaceutical company	12	

1b. When was the last time you took part in a group discussion or depth interview? (Write in)

TERMINATE IF LESS THAN 6 MONTHS AGO

2. Do you smoke any of the following?

Cigarettes (pre-made)	1	TERMINATE
Cigarettes (Roll Your Own)	2	Continue to question 9
Cigarillos	3	Continue to question 7
Cigars	4	Continue to question 4
I do not smoke any of the above	5	TERMINATE

CIGAR SMOKERS

4. Which of the following statements describes your behaviour in relation to smoking cigars:

I smoke a cigar at least once every two weeks	1	CONTINUE
I smoke less than one cigar a month	2	TERMINATE
Any other	3	TERMINATE



5. How much are you usually willing to spend on a cigar:

\$10-\$15 per cigar	1	TERMINATE
\$15-\$25 per cigar	2	TERMINATE
\$25+ per cigar	3	CONTINUE

6. Which of the following best describes your buying habits when it comes to cigars:

I only ever buy single sale cigars (as and when I want one)	1	AIM FOR A MIX OF BUYING BEHAVIOURS
I buy my cigars in boxes / cases	2	
I buy single sale but also occasionally a box / case	3	

CIGARILLOS SMOKERS

7. How often do you smoke cigarillos

Once a month	1	TERMINATE
Once every two weeks	2	TERMINATE
Once a week or more	3	CONTINUE

8. Which of the following brands do you smoke?

Wee Willem	1	AIM FOR A MIX
Cafe Creme	2	
Henri Wintermans	3	
Captain Black	4	
Davidoff Cigarillo	5	
Dunhil	6	
Other (please specify _____)	7	

RYO SMOKERS

9. How often do you smoke roll your own cigarettes

Once a week or more	1	CONTINUE
Less than once a week	2	TERMINATE

FOR ALL



10. Record gender.

Male	1	SEE QUOTAS
Female	2	

11. How old are you (write in and code below)?

Under 18 years old	1	CLOSE
18-21	2	SEE QUOTAS
22-29	3	
30-40	4	
Over 40 years old	5	

QUOTAS

Qu. 10 – even gender split for RYO smokers

Qu. 11 - RYO smokers to be split: 18-30 and 30+

Incentives and timings will be will be:

Cigar depths	\$	1 hour
RYO groups	\$	1.5 hours
Cigarillo groups	\$	1.5 hours

OTHER

In regards to cigar smokers, if necessary feel free to tell them that the project is about health warnings on cigar products and the plain packaging initiative being undertaken by the government in order to entice them to take part



## 13 APPENDIX E: USING THIS RESEARCH

It is important that clients should be aware of the limitations of survey research.

### Qualitative Research

Qualitative research deals with relatively small numbers of respondents and attempts to explore in-depth motivations, attitudes and feelings. This places a considerable interpretative burden on the researcher. For example, often what respondents do not say is as important as what they do. Similarly, body language and tone of voice can be important contributors to understanding respondents' deeper feelings.

Client should therefore recognise:

- that despite the efforts made in recruitment, respondents may not always be totally representative of the target audience concerned
- that findings are interpretative in nature, based on the experience and expertise of the researchers concerned

### Quantitative Research

Even though quantitative research typically deals with larger numbers of respondents, users of survey results should be conscious of the limitations of all sample survey techniques.

Sampling techniques, the level of refusals, and problems with non-contacts all impact on the statistical reliability that can be attached to results.

Similarly quantitative research is often limited in the number of variables it covers, with important variables beyond the scope of the survey.

Hence the results of sample surveys are usually best treated as a means of looking at the relative merits of different approaches as opposed to absolute measures of expected outcomes.