

**Comparing pack design and branding  
appeals between the most expensive and the  
cheapest cigarette packs from 14 low and  
middle income countries**

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# Disclosures

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## **Industry funding to investigator in the last 5 years:**

None

## **Off label medication uses discussed:**

N/A



# Acknowledgements

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- The authorship team would like to thank the entire TPackSS team in Baltimore and in the 14 countries where data were collected.

## Data Collection

### Countries:

Bangladesh, Brazil,  
China, Egypt, India,  
Indonesia, Mexico,  
Pakistan, Philippines,  
Russia, Thailand,  
Turkey, Ukraine,  
Vietnam



# Analytic aim to bring together 2 of the 4 Ps of Marketing

We know:

- The pack is key to cigarette branding, and branding shapes product appeal and use experience
- Providing health information on the pack is an effective way to warn people about the dangers of smoking
- Price matters in terms of people's tobacco usage
- *Not as much known about how price and product relate to one another*

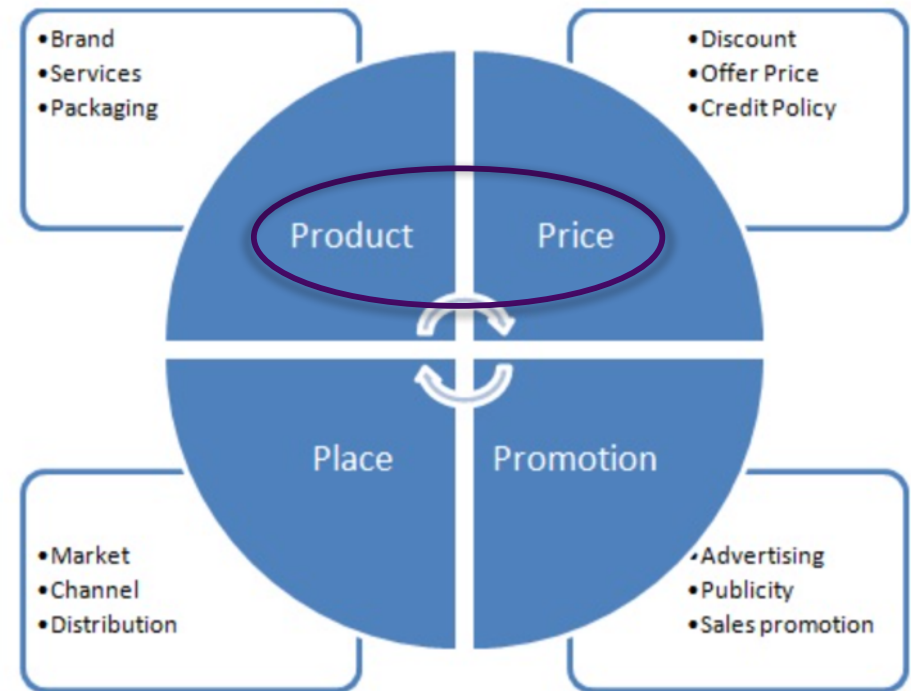


Image taken from mbaskool.com

# Research Questions

- Are the most expensive and cheapest packs of cigarettes available for purchase in low and middle income countries different in meaningful ways? Specifically:
  - Does adherence to warning label policies differ between expensive and cheap packs?
  - Do expensive and cheap packs use different design elements?
  - Do the major branding elements on expensive packs differ?



The slide features a dark purple background with a large, faint watermark of a shield on the left side. The shield contains a flame at the top and a globe at the bottom. A horizontal, semi-transparent grey bar is positioned across the middle of the slide, containing the title text in white. The text is in a bold, serif font.

# TPackSS 2013 Methods



**14 Countries**



**44 Cities**



**528 Neighborhoods**



**3,307 Cigarette Packs**









The background of the slide is a dark purple color. On the left side, there is a large, faint, light purple watermark logo. The logo consists of a shield-like shape containing a flame at the top and a globe with latitude and longitude lines at the bottom. A horizontal, semi-transparent light purple bar is positioned across the middle of the slide, containing the text "TPackSS Data" in a white, serif font.

# TPackSS Data

# TPackSS Data: The Packs

- 3,307 cigarette packs across 14 countries
- Largest sample from China (453 packs)
- Smallest sample from Indonesia (47 packs)



# Coding Packs

We code all 'unique' packs  
Packs are coded by 2 trained  
research assistants in Baltimore  
& concordance is measured

Packs are coded for:

- Brand/Brand Variant
- Price
- Tax stamp
- HWL presence
- Vendor/SES of purchase area
- Pack features
- Brand appeals (words and imagery)



# Price Data

- Data on purchase price for each pack
- Price transformed into US \$ to standardize
- Analysis focuses on the cheapest and most expensive packs in each country (5% of sample at each end)
- 187 packs in cheapest subset and 198 packs in the most expensive subset







# Health Warning Label Compliance

Country-specific code books developed based on close reading and application of country policy

Only packs with current and appropriate health warning label assessed

Determination of compliance using key indicators

- Warning location
- Warning size
- Warning color and content
- Warning text size





# Features and Appeals Coding

- A single codebook is utilized across countries to code for pack features and branding appeals
- Codebook based on prior work on impactful elements of packaging & ability to code with objectivity
- All coding (warning label compliance and features and appeals) implemented in teams of 2 with daily checks for consistency and reliability



# Features and Appeals Coding

## Features:

e.g. Size, Shape, Opening, # of Sticks, 'Fancy Features', Stick Features, Use of Color, Ingredients

## Appeals: *Both lexical and imagery*

e.g. Technology, **Luxury**, Organics & Nature, **Feminine**, Masculine, Flavor, **Less Harm**



# Comparing cheapest and most expensive packs

**For this analysis, we:**

- Conducted basic non-parametric tests to look for differences in HWL compliance as well as key pack features and branding appeals
- Considered the samples overall and by country

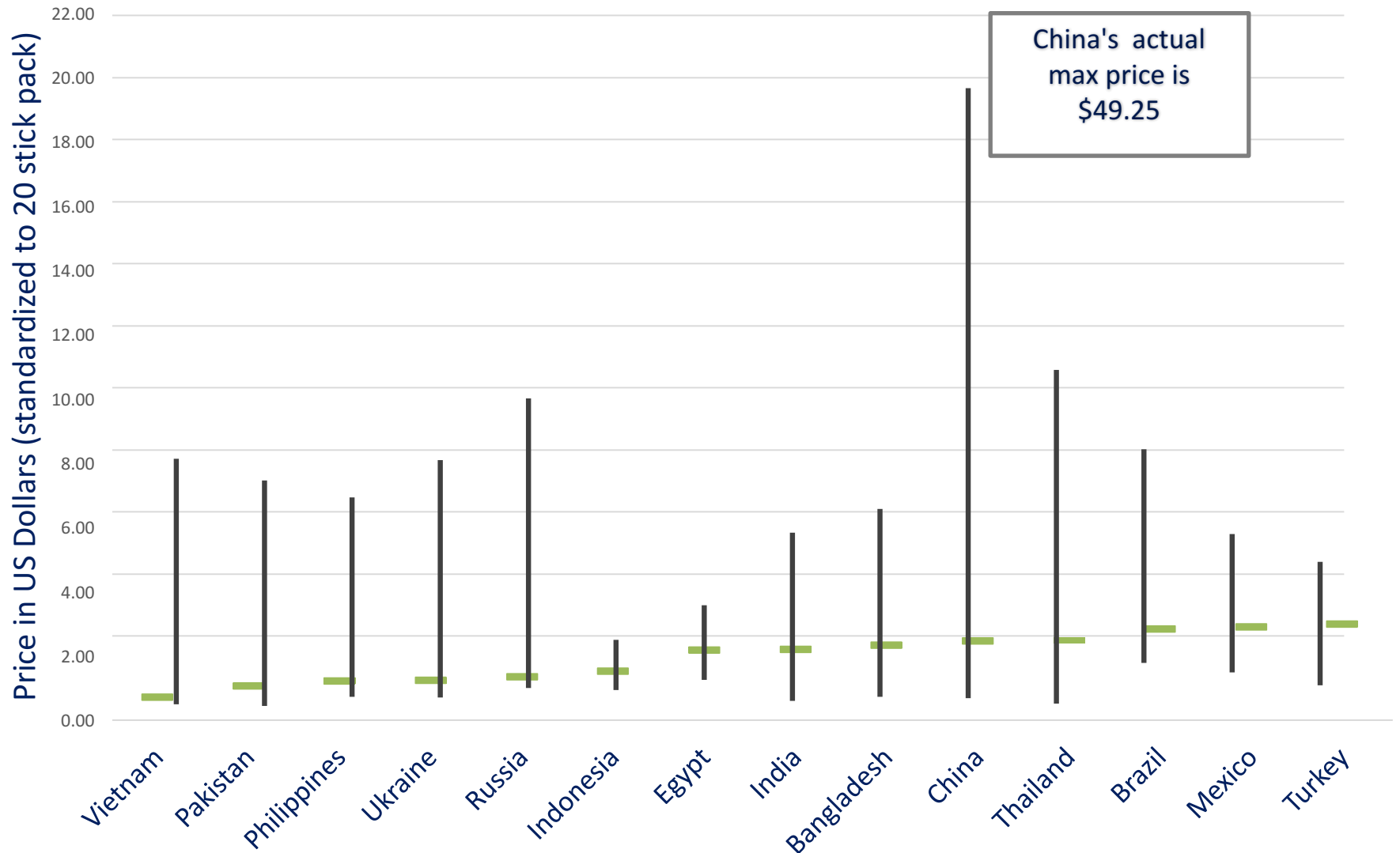


A stylized logo on the left side of the slide. The top part features a flame-like shape, and the bottom part features a globe with latitude and longitude lines. The logo is rendered in a lighter shade of purple against the dark purple background.

# Results

# Pack Price Distribution by Country

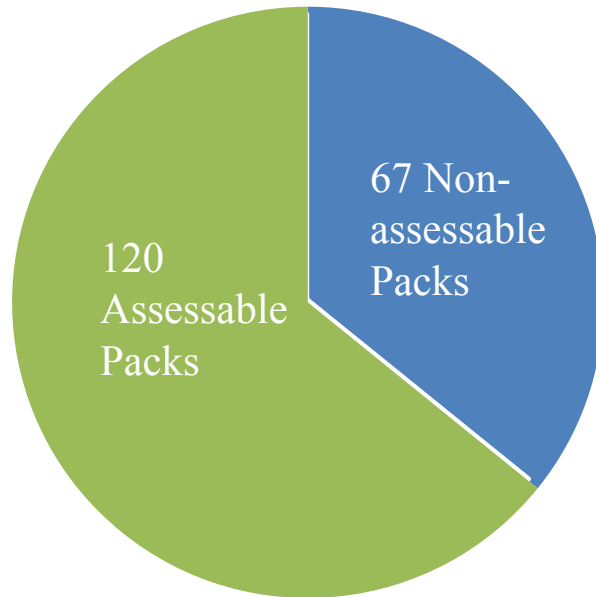
(min, median, max)





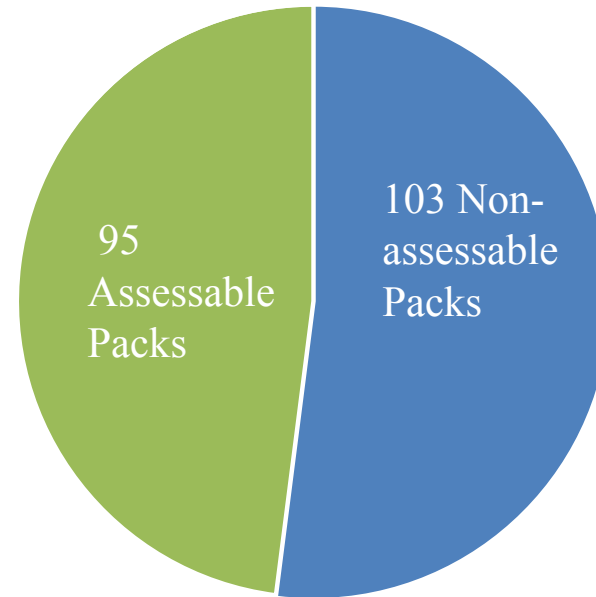
# Existence of Appropriate Warning Label for Compliance Assessment

Cheap Pack Sample



36% of the cheap packs (67/187) could not be assessed for compliance

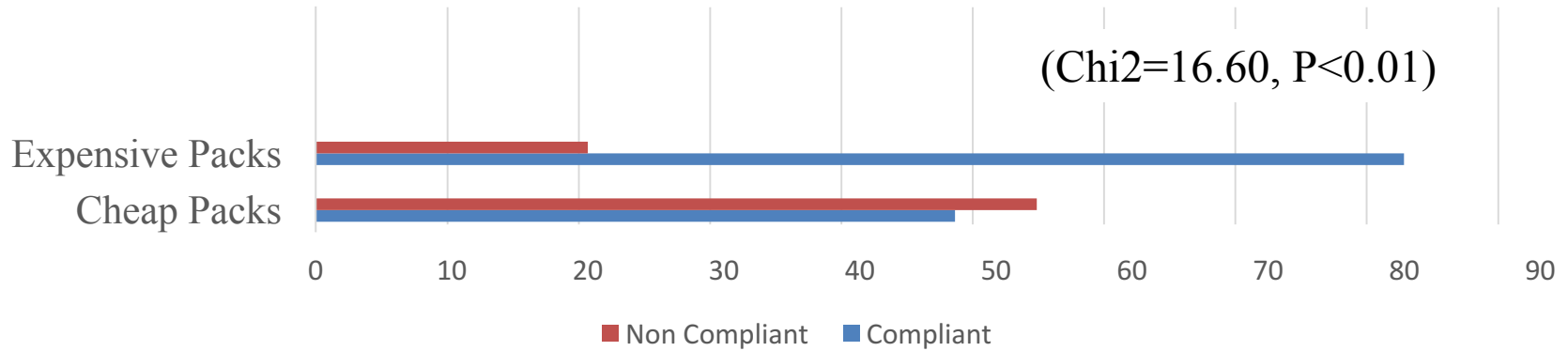
Expensive Pack Sample



52% of the expensive packs (103/197) could not be assessed for compliance



# Warning Label Compliance



# Comparison of pack features

	More likely in expensive packs	More likely in cheapest packs
Soft Packs	8%	✓ 25%
Variation in opening style	✓ 6 styles	4 styles
Alternative size packs (lipstick, wide, extra-wide)	✓ 20%	7%
Beveled or rounded edges	✓ 32%	7%



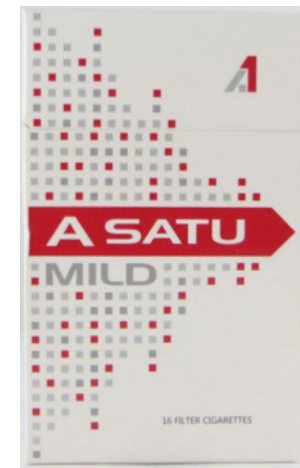
# Misleading descriptors: Less Harm

- Presence of indicators of 'less harm' such as 'mild', 'smooth', 'safer', or dots or numbers to signify strength

	More likely in expensive packs	More likely in cheapest packs
Significant	Bangladesh India Pakistan Thailand	
Trending	China Egypt Russia Ukraine Vietnam	Philippines Turkey
None found	Brazil, Indonesia, Mexico	



India



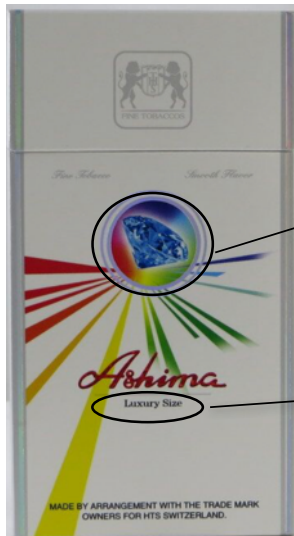
Thailand



# Luxury appeals

## Illustrative Examples From Cheaper Packs

Turkey



Precious stone imagery

“Luxury Size”



Bangladesh and Pakistan

	More likely in expensive packs	More likely in cheapest packs
Significant		Bangladesh Pakistan
Trending	China Russia	Brazil India Philippines Thailand Turkey Ukraine Vietnam
None found	Egypt, Indonesia, Mexico	



# Feminine Appeals

Feminine appeals were essentially equally likely in cheap and expensive packs.

In Russia there were significantly more cheap packs that had feminine appeals (37% vs. 12%)



Example Russian 'Feminine' Packs



Example 'Feminine' Packs from Mexico, Pakistan, Ukraine, & Bangladesh

# Results Summary

- A greater % of expensive packs did not include a current, country-appropriate health warning label – more illicit packs in the expensive sample?
- Higher HWL compliance in the more expensive, legal packs
- Greater proportion of expensive packs include ‘reduced harm’ messages
- Greater proportion of cheaper packs include ‘luxury’ messages
- Feminine packs were equally likely in the entire sample



# Discussion

- **We see this analysis as raising questions rather than definitively answering them:**
  - Why are the health warnings on the cheaper packs less likely to be compliant with country policies? Does this have disparities implications?
  - Do cheaper packs use luxury messages to reassure smokers who are ‘switching down’ in response to tax increases or to ‘sell the dream’ to poorer smokers? Or both?
  - Are ‘less harm’ messages more likely on more expensive packs to reassure people with greater resources who are more likely to be considering quitting?



# Limitations

- In our 2013 data collection, we only had 1 price point per brand variant per country. We have modified this in our second wave of data collection
- Data driven by initial ‘buy everything’ store in initial city; we have made modifications to the protocol going forward
- Not all countries have the same number of indicators/elements for health warning label compliance based on country laws





**Thank you!**

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