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Death of a salesman

Gerard B Hastings,¹ Crawford Moodie²

¹Department of Marketing, University of Stirling and the Open University, Stirling, UK
²Department of Marketing, Institute for Social Marketing, University of Stirling, Stirling, UK

Correspondence to

Professor Gerard B Hastings, Department of Marketing, University of Stirling and the Open University, Stirling FK9 4LA, UK; gerard.hastings@stir.ac.uk

TAKING THE LEAD

In December 2012 Australia became the first jurisdiction to mandate plain (or standardised) packaging for tobacco products. Many governments have been looking on with interest, anxious to learn if this is also the next step forward in their own efforts to tackle the harms caused by tobacco. This special issue begins to answer this question by presenting a series of studies which provide an initial evaluation of the policy. What have been the early impacts of plain packaging on young people and adult smokers? And are there any unintended consequences—has it reduced prices, for instance, or encouraged illicit tobacco use?

THE LAST WORD IN TOBACCO MARKETING?

Plain packaging is the latest of many moves by policy makers to constrain tobacco marketing. It is over 50 years since the first tentative steps were taken, typically picking off TV advertising, but it was not until this century that the need for controls to be comprehensive was fully appreciated. Market forces, it became clear, dictate that any gaps will be exploited and promotional budgets moved to unregulated channels. The pack itself is one of the last of these promotional fall-backs. In recent years the literature has documented a seemingly endless flow of elaborate packaging innovations. It has also demonstrated how tobacco companies have used the pack to promote their products, mislead consumers about the harmfulness of smoking, and undermine the legally mandated health warnings. So even in markets that are otherwise dark, packaging continues to offer tobacco companies a glimmer of light, providing a last channel for conveying image, symbolism and brand meaning.¹

FROM THEORY INTO PRACTICE

Until recently the evidence base for plain packaging has, perforce, been hypothetical. Australia's lead has now delivered a real world natural experiment. The real world, of course, is messy and natural experiments less neat than custom-designed ones. As such, it remains a challenge for researchers, particularly as plain packaging has been part of a wider package of measures introduced by the Australian Government, including larger health warnings, mass media campaigns and tax increases. Separating out the effects of each can prove difficult—it was ever so. Nonetheless, the picture to emerge from the papers in this special issue suggests that plain packaging is delivering on its hypothetical promise, and the potential downsides, much vaunted by its opponents, are not materialising.

THIS ISSUE UNPACKED

The evidence suggests that plain packaging is severely restricting the ability of the pack to communicate and create appeal with young people and adults.^{2–4} For instance, school-based surveys with students aged 12–17 year in 2011 and 2013 show that the removal of branding and uniformity of pack appearance has increased negative pack ratings and decreased positive ones.⁴ Cognitive processing of the health warnings did not change, however, suggesting that pack appearance is more relevant to young people than are the warnings.⁵

A number of studies with adult smokers point to plain packaging fulfilling its core aims of reducing appeal, particularly among young adults, and increasing warning salience.³ In a cross-sectional tracking survey of cigarette smokers, plain packaging was associated with increased thinking about quitting and quit attempts.⁶ In addition, dislike of the pack, lower satisfaction from cigarettes and attributing motivation to quit to the warnings predicted daily thoughts of quitting.⁷ These findings may also help to explain why smokers were more likely to conceal their packs in outdoor venues after the introduction of plain packaging.⁸ Research with adults is not confined to cigarette smokers either, with a mixed methods study suggesting that the benefits of plain packaging may also extend to cigar and cigarillo smokers.² A lesson perhaps for those governments (eg, Ireland, UK) planning to exclude such products from plain packaging legislation.

These findings highlight the potential impacts on adult smokers, a group often overlooked in the plain packaging debate. Clearly, prevention is better than cure, which is why stopping new generations from starting to smoke is a key objective of plain packaging, but adult smokers are also an important potential target. That they are amenable to change is beyond question: in Australia (as in many other markets) there are more ex-smokers than current smokers. These studies suggest that plain packaging can play a role in encouraging this transition.

This issue also examines whether plain packaging has had any unintended consequences. Did it lower prices for licit tobacco or increase the use of illicit tobacco, both of which might be expected to encourage smoking? There is no evidence for either effect.^{9–12} A review of retail magazines, for instance, shows that following the introduction of plain packaging, average inflation-adjusted recommended retail prices actually increased for cigarettes in all price segments (value, mainstream and premium).¹⁰ The rise in cost was greatest for cigarettes in the mainstream and premium segments, which may, in part, help explain the shift to value



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brands.¹¹ As for the source of retail purchase, there was no decline in the percentage of smokers purchasing from convenience stores and no indication of increased purchase from overseas, online or duty-free.¹³ And in contrast to the findings from the tobacco industry commissioned KPMG report,¹⁴ there was no evidence of an increase in the consumption of illicit ‘cheap white’ cigarettes.¹²

WHAT WILL HAPPEN IF GOVERNMENTS DO NOT ACT?

This issue is focused on what happens when plain packaging is introduced, but it is instructive to consider what is likely to occur in markets where government does not act and the status quo prevails. The pack will continue to be used as a marketing channel and innovations will proliferate. New pack structures—sizes, openings, construction materials—are inevitable. Beyond visual appeal we are also likely to see: packs with special foils, varnishes or coatings that create distinct tactile experiences; audio packs that play pre-recorded messages, music or other noises, which are already available for some other products¹⁵; and packs which release fragrances (which are already patented by tobacco companies). Inks will also have an important role to play in future on-pack marketing, with phosphorescent ‘glow in the dark’ inks having already appeared on cigarette packs in some markets, and packs with photochromic (light-sensitive), thermochromic (heat-sensitive) or oxygen-sensitive inks likely to follow. Although only for display purposes, photochromic Camel packs which change colour appeared in retailers in the Netherlands in 2014. Conductive inks, which enable printed electronics technology and the incorporation of cheap electrical circuits into cardboard are also opening up a world of marketing opportunities.¹⁶ Cartons of Kent cigarettes, with circuit boards and touchpads enabling scrolling on-pack messages, have already appeared in duty-free outlets in Asia. As technology advances, it is possible that printed electronics may be applied to deliver moving images on tobacco packaging. Similarly, we may see cigarette packs capable of digitally communicating with consumers and allowing connectivity to their virtual worlds via smart devices (smartphones, smart watches, smart glasses).

Whatever directions these innovations take, it is clear that the marketing power of the pack is only going to increase. So governments which do not act on plain packaging today will have a bigger problem to tackle tomorrow.

A CASEBOOK EXAMPLE

Plain packaging in Australia has been a casebook example of effective tobacco control—a policy measure driven by evidence, carefully designed and implemented, and now rigorously assessed. Further, it is set within the context of wider Australian tobacco control, reinforcing the most basic lesson learned over the last half century: action has to be strategic and comprehensive. There are no silver bullets. This issue demonstrates that plain packaging is beginning to deliver on its promise, and an important step forward, but it is still only part of the solution. Australia has learned and applied this lesson well and that is

why it has one of the lowest smoking prevalence rates in the world.

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Tobacco Control

Special supplement presents the latest evidence showing the benefits of introducing standardised packaging for tobacco products in Australia

Editorial points to the future packaging innovations tobacco companies would be able to employ in the absence of standardised packaging

Over the last 50 years the avenues open to tobacco companies to market their products have been closed off, and the pack itself remains one of the last promotional opportunities, says an editorial in **Tobacco Control**. The editorial introduces a special supplement evaluating the effects of introducing tobacco standardised packaging in Australia.

Legislation requiring standardised packaging, where the pack carries only the brand name and the make, alongside a raft of graphic photos accompanying health warnings, was introduced in Australia in 2012.

Ireland has recently voted to introduce similar legislation and in the UK the House of Lords is due to vote to do so this week. If they back last week's vote by MPs, standardised packaging for tobacco products will be introduced in the UK from May 2016.

This Tobacco Control supplement reports the results of a series of studies that have evaluated the success of the policy in Australia. Some of these studies suggest that standardised packaging is severely restricting the ability of the pack to communicate and create appeal with young people and adults. Others show that there is little evidence that standardised packaging is having unintended consequences, such as lowering tobacco prices or increasing the use of illicit tobacco.

Key findings include:

- Standardised packaging was associated with increased thinking about quitting and quit attempts.
- School children aged 12–17 years found standardised packaging less appealing.
- Smokers were more likely to conceal their packs from view in outdoor venues after the introduction of standardised packaging.
- Although there was a shift to value brands following the introduction of standardised packaging in Australia, retail prices for cigarettes actually increased across the board (value, mainstream and premium brands).
- The percentage of smokers purchasing cigarettes from convenience stores did not fall after standardised packs were introduced and there was no indication of an increase in overseas, online or duty-free purchases.
- There was no evidence of an increase in the consumption of illicit cigarettes following the introduction of standardised packaging.

While the supplement focuses on the effects of introducing standardised packaging, the authors of the editorial also consider the consequences if it is not introduced.

"The pack will continue to be used as a marketing channel and innovations will proliferate," say Professor Gerard Hastings and Dr Crawford Moodie of the Cancer Research UK Centre for Tobacco Control Research at the University of Stirling, UK. They go on to outline some of the packaging innovations that tobacco companies could turn to in the future in the absence of standardised packaging.

Changes to the structural design of the pack - different sizes, openings and use of alternative construction materials - are inevitable, they say. Tobacco companies are also likely to introduce packs with special foils, varnishes or coatings that create distinct tactile experiences for consumers, and audio packs that play pre-recorded messages, music or other noises. Tobacco companies have already patented fragrances which could be released from tobacco packs, they say.

Innovations in ink technology will also find their way to tobacco packaging, they suggest. Phosphorescent 'glow in the dark' inks having already appeared on cigarette packs in some countries, and packs with light-sensitive (photochromic), heat-sensitive (thermochromic) or oxygen-sensitive inks are likely to follow. Photochromic Camel packs, which change colour according to temperature, appeared in retailers in the Netherlands for display purposes in 2014.

Conductive inks, which enable electrical circuits to be incorporated into cardboard are also opening up marketing opportunities. Cartons of Kent cigarettes, with circuit boards and touchpads enabling scrolling on-pack messages, have already appeared in duty-free outlets in Asia.

Looking into the future, it is not beyond the realms of possibility that printed electronics may be applied to deliver moving images on tobacco packaging and that cigarette packs capable of digitally communicating with consumers via smart devices (smartphones, smart watches and smart glasses) will be feasible, they say.

"Whatever directions these innovations take, it is clear that the marketing power of the pack is only going to increase. So governments which do not act on plain packaging today will have a bigger problem to tackle tomorrow," they conclude.