

# Lessons Learned From An Unregulated Tobacco Marketplace

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American Public Health Association

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# Some Concepts to Bear in Mind

- As we go through all of our presentations, we ask that you keep four concepts in mind
- First...*the “continuum of risk”*
  - Combustible; heated; oral high; oral low; medicinal nicotine
  - We need to acknowledge that it exists
  - Needs to help inform harm reduction policy and communications
- Second...*exposure reduction vs. risk reduction*
  - Exposure reduction may or may not mean that there has been a reduction in risk
  - They must travel together

# Some Concepts to Bear in Mind

- Third...*individual-level risk vs. population-level harm*
  - It's one thing to advise a pack-a-day smoker to switch to smokeless
  - But policy gets made at the population level; so we must account for the impact of these products at the population level
  - More on that soon
- Fourth...*unregulated vs. regulated marketplace*
  - All of this has played out in the historically unregulated marketplace
  - There is a potential for that to change dramatically if the legislation that Robin will be describing passes and the industry is forced to operate in a science-based, regulated environment

# The Marketplace Context for “PREPs”

- New generation of so-called reduced exposure and reduced risk products
- “Light” cigarettes (87% of the market)
- Smokeless tobacco products

# First Question...

# First Question...Why Should You Care?

- Impact on cessation efforts
- Impact on re-initiation by ex-smokers
- Impact on initiation by never-smokers, including youth and young adults
- So let's start with a look back

# Historical Examples of How the Tobacco Industry Addressed the Health Concerns of Smokers and Tried to Position “Light” Cigarettes

1930s -  
Soothe  
the throat,  
fool the  
body

Consider your Adam's Apple!!\*  
Don't Rasp Your Throat

With Harsh  
Irritants

"Reach for a  
LUCKY instead"



What effect have harsh irritants present in all  
new tobaccos upon the throat? A famous author-  
ity, retained by us to study throat irritation says:

"The tissues above and below the vocal  
chords and the vocal chords themselves may  
become acutely or chronically congested  
as a result of the inhalation of irritating  
fumes in the case of chemicals for example."

LUCKY STRIKE'S exclusive "TOASTING" process  
expels certain harsh irritants present in all new  
tobacco. We sell these expelled irritants to manu-  
facturers of chemical compounds. They are not  
present in your LUCKY STRIKE. So Consider your  
Adam's Apple - that is your larynx - your voice  
box - it contains your vocal chords. Don't rasp  
your throat with harsh irritants. Be careful in your  
choice of cigarettes. Reach for a LUCKY instead.



Harold B. Fager  
NEW YORK, N. Y.

"It's toasted"

Including the use of Ultra Violet Rays  
Sunshine Mellowers - Heat Purifiers

Your Throat Protection - against irritation - against cough



# THE SHOCK OF FACING *what your figure may become*



COMING EVENTS CAST  
THEIR SHADOWS BEFORE"  
— Thomas Campbell — 1844

## AVOID THAT FUTURE SHADOW

by refraining from over-  
indulgence, if you would  
maintain the modern fig-  
ure of fashion

We do not represent that  
smoking Lucky Strike Ciga-  
rettes will bring modern figure  
or cause the reduction of flesh.  
We do declare that when tempt-  
ed, to do yourself too well,  
you will "Reach for a Lucky  
instead, you will thus avoid  
over-indulgence in things that  
cause excess weight and, by  
avoiding over-indulgence, main-  
tain a modern, graceful figure.

*When Tempted*

**Reach  
for a  
LUCKY  
instead**

**"It's toasted"**




Your Throat Protection — against irritation — against cough

PHOTOS COURTESY OF L&M BLM

# 1950s – Filter out the toxins

To 1 out of every 3 cigarette smokers:

## Kent—the one cigarette that can show you proof of greater health protection




Every week, millions see convincing evidence that KENT's "Micronite" Filter is the cigarette filter that really works—giving true smoking pleasure, yet removing up to 7 times more nicotine and tars than other filter cigarettes.


If... the 1 out of every 3 smokers—you've written to the name and address on tobacco, you will meet them just a promise that a five-tip cigarette will give you the health protection you need.

And KENT is the one cigarette that gives you more than a promise. Every week on television and in more than 100,000 stores—the effectiveness of KENT's Micronite Filter is proved before your very eyes... tested against other filter tip brands selected at random from packages brought to you!


The pictures shown here are actual shots of one of these tests—as performed by Jonathan Blake, your host on the exciting TV show, *The Test*.




**1. Everything equal.** Two special glasses made with water through which smoke can be drawn are placed on a single sheet of paper, which Jonathan Blake explains that you will use to test the smoke of the new KENT. The other glass will test the nicotine and tar content of another filter tip brand cigarette.




**2. Millions watch him.** Blake draws smoke from the KENT into one glass, smoke from Brand X into the other. Notice that the smoke does not enter his mouth. It is drawn into the glasses exactly as it comes through the filter of the cigarette—exactly as it would enter your mouth if you were smoking!



**3. Time is checked.** Blake allows a few minutes for the smoke to permeate the water in the right glass. KENT's Micronite Filter filters from all other cigarette filters, but it's made up of more paper, more or cellulose like other filters—but with a filter that has been used to filter air to remove many poisons.



**4. And here's your answer.** When the glasses are lifted, you can see a large stain from nicotine in the smoke of Brand X, scarcely a trace from the smoke of the KENT! The difference in the two stains represents the difference in the health protection you get from a KENT as compared to the filter tip brand you may now be smoking!

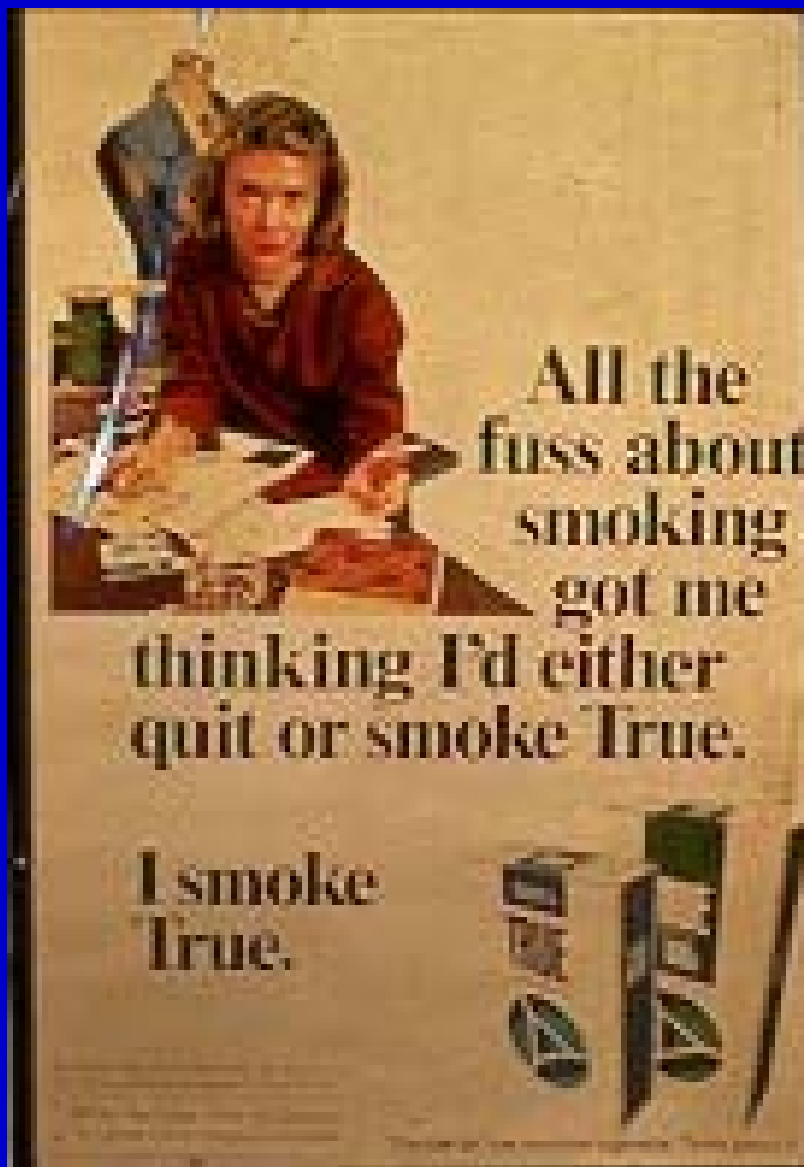


**5. Against all others.** Here are the results of the tests just performed in a laboratory, showing how KENT's filtering effectiveness compares with four other well known brands of filter tip cigarettes. Again the stains on the paper show you the tremendous difference between KENT and other filter tip cigarettes. Remember that, when you smoke, the smoke enters your mouth and goes into your lungs. How much of the smoke is filtered out? That's how much the stains are drawn into your system. There is further proof that KENT's Micronite Filter takes out up to 7 times more nicotine and tar than other filter tip cigarettes. How is proof that KENT offers you the greatest health protection in cigarette history? Why don't you start smoking KENT's today!

# Kent

with exclusive  
MICRONITE Filter

full smoking pleasure...  
plus proof of the  
greatest health protection ever



Bluntly stated claims used in the 1970s

More recent  
“claims” and  
imagery are  
subtler than  
blunt claims of  
the 1970s.

© 1998 B&W T Co.  
www.brownandwilliamson.com

1 mg

ISN'T IT TIME YOU  
STARTED THINKING  
ABOUT NUMBER ONE?

**THINK CARLTON.  
WITH 1 MG. TAR, IT'S THE ULTRA ULTRA LIGHT.**

People April 1999

SURGEON GENERAL'S WARNING: Cigarette  
Smoke Contains Carbon Monoxide.

100's Box 1 mg tar, 0.1 mg nicotine av. per cigarette by FTC method.

SURGEON GENERAL'S WARNING: Quitting Smoking Now Greatly Reduces Serious Risks to Your Health.

King "tar" 0.3 mg average per cigarette by FTC method.

# NEW MARLBORO ULTRA LIGHTS

Famous Marlboro flavor now in an Ultra Light.



Previously Available in Limited Markets  
© Philip Morris Inc.

# The New Generation of Products

- Smoked
  - Modified Tobacco
    - Omni
    - Advance
    - Quest
    - SCoR
  - Cigarette Gizmos
    - Eclipse
    - Accord
- Oral
  - Camel Snus
  - Taboka
  - Marlboro Snus
  - Ariva
  - Revel
  - Skoal and Copenhagen

# Advance (B&W)

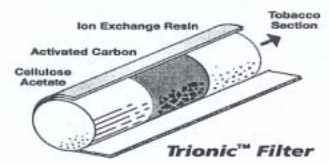


# **NEW** ADVANCE

**A Step In The Right Direction.**

**All of the taste...  
Less of the toxins.**

ADVANCE contains less toxins than the leading lights brands, thanks to a revolutionary



new filter design and a patented new method for curing tobacco.

Made with premium tobaccos, ADVANCE offers all of the rich,

satisfying taste you expect from a great lights cigarette. Less toxins and great taste...

Now that's an ADVANCE.

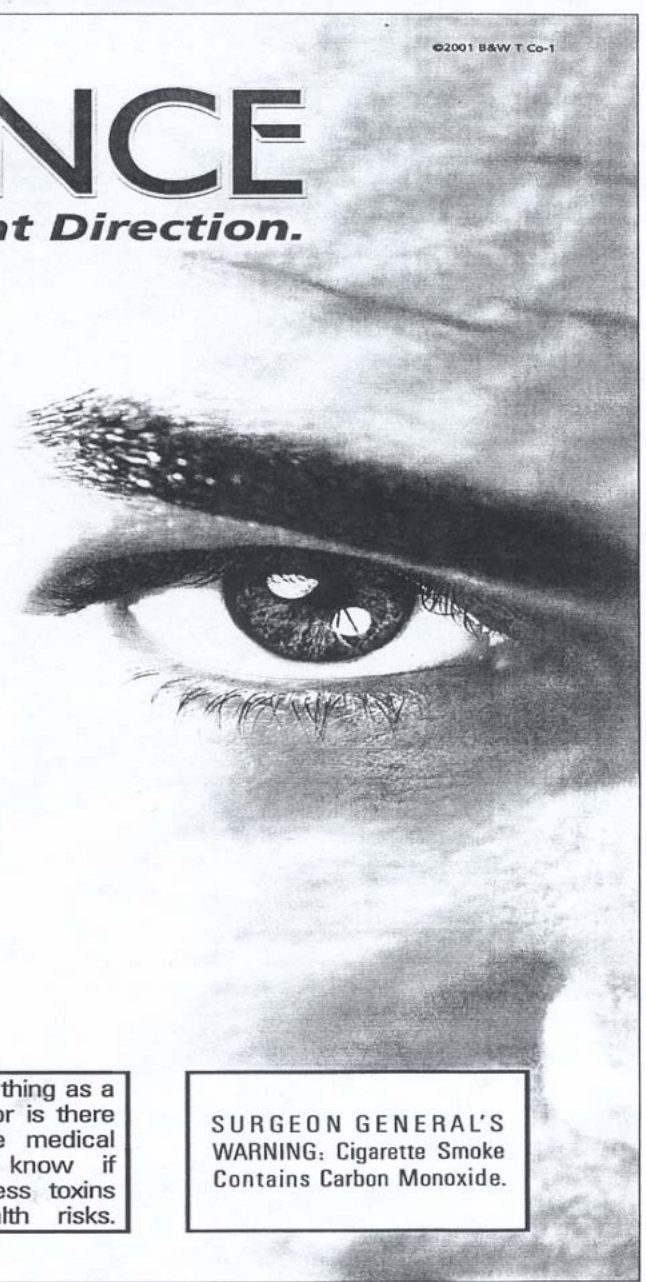


10 mg. "tar", 0.8 mg. nicotine av. per cigarette by FTC method. Actual deliveries will vary based on how you hold and smoke your cigarette. For more product information, visit our website at [www.bw.com](http://www.bw.com)

**Available in the Indianapolis Metro Area**

There is no such thing as a safe cigarette, nor is there enough available medical information to know if Advance with less toxins will lower health risks.

**SURGEON GENERAL'S WARNING: Cigarette Smoke Contains Carbon Monoxide.**



ADVANCE Magazine Ad male.tif





## Everyone loves a smoker. No, really.

Think about it. There's someone in your life who still likes to smoke. Your sister. A best friend. A colleague. Or maybe even you. Everyone knows quitting is the best thing. But for those who continue to smoke, now there's Advance. It's the innovative new cigarette that's lower in toxins yet rich in taste. A new formula for pleasure and a real step in the right direction.

To learn more about how Advance reduces toxins, log on to [www.bwtarnic.com](http://www.bwtarnic.com)



>ADVANCE THE WAY YOU SMOKE

ADVANCE LIGHTS  
Lights Kings: 10 mg. "tar," 0.9 mg. nicotine av. per cigarette by FTC method. The amount of tar and nicotine you get from this product varies depending on how you smoke it. There is no such thing as a safe cigarette. For more information visit [www.bwtarnic.com](http://www.bwtarnic.com)

Less toxins does not mean that ADVANCE is a safer cigarette. If you are concerned about the health risks of smoking you should quit.

**SURGEON GENERAL'S WARNING: Quitting Smoking Now Greatly Reduces Serious Risks to Your Health.**

**WARNING:** Smoking is addictive and dangerous to your health. Reductions in carcinogens (PAHs, nitrosamines, and catechols) have NOT been proven to result in a safer cigarette. This product produces tar, carbon monoxide, and other harmful byproducts.

**SURGEON GENERAL'S WARNING:** Smoking Causes Lung Cancer, Heart Disease, Emphysema, And May Complicate Pregnancy.

Reductions in carcinogens are in comparison to similar repetitive brand styles.

OMNI Kings: 15 mg "tar," 1.1 mg nicotine av. per cigarette by FTC Method.  
OMNI Lights: 10 mg "tar," 0.8 mg nicotine av. per cigarette by FTC Method.



**NEW!**  
**Omni**

Reduced carcinogens. Premium taste:

Introducing the first premium cigarette created to significantly reduce carcinogenic PAHs, nitrosamines, and catechols, which are the major causes of lung cancer in smokers.



For more information call  
1-866-639-OMNI  
or visit us at [www.omnicigs.com](http://www.omnicigs.com)

© 2007 Omni Cigarette Co.

# Quest (Vector)



# Quest (Vector)

Step your way to  
**Nicotine Free!**

**new**  
**Quest**

Now you can enjoy smoking without all of the Nicotine.  
Introducing **Quest 1 2 3**. The first cigarette  
brand that gradually steps you to Nicotine Free smoking.  
Real cigarettes, real premium tobacco, real smoking enjoyment.

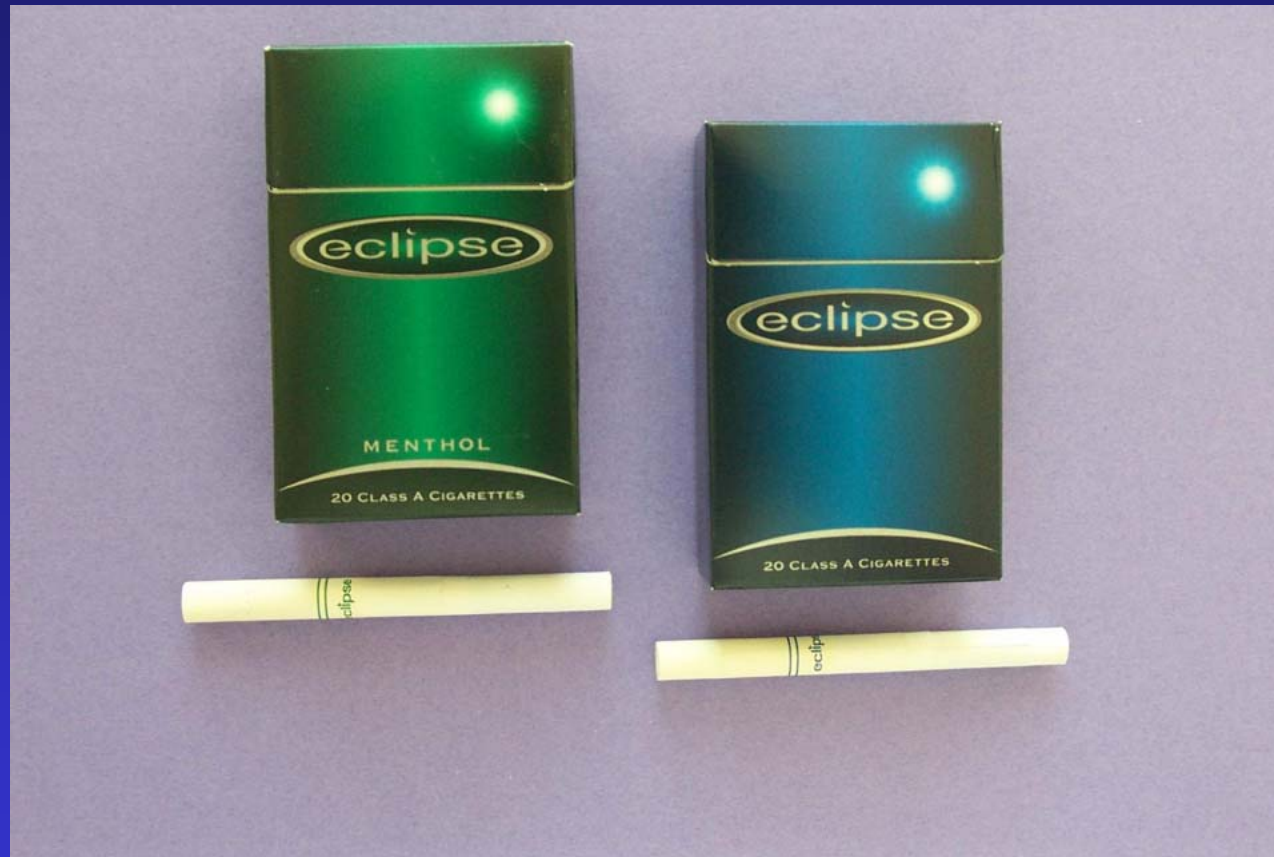


The image shows three packs of Quest cigarettes arranged in a row, connected by arrows pointing from left to right. The first pack is labeled '1 Low Nicotine', the second '2 ExtraLow Nicotine', and the third '3 Nicotine Free'. A single cigarette is shown to the left of the first pack.

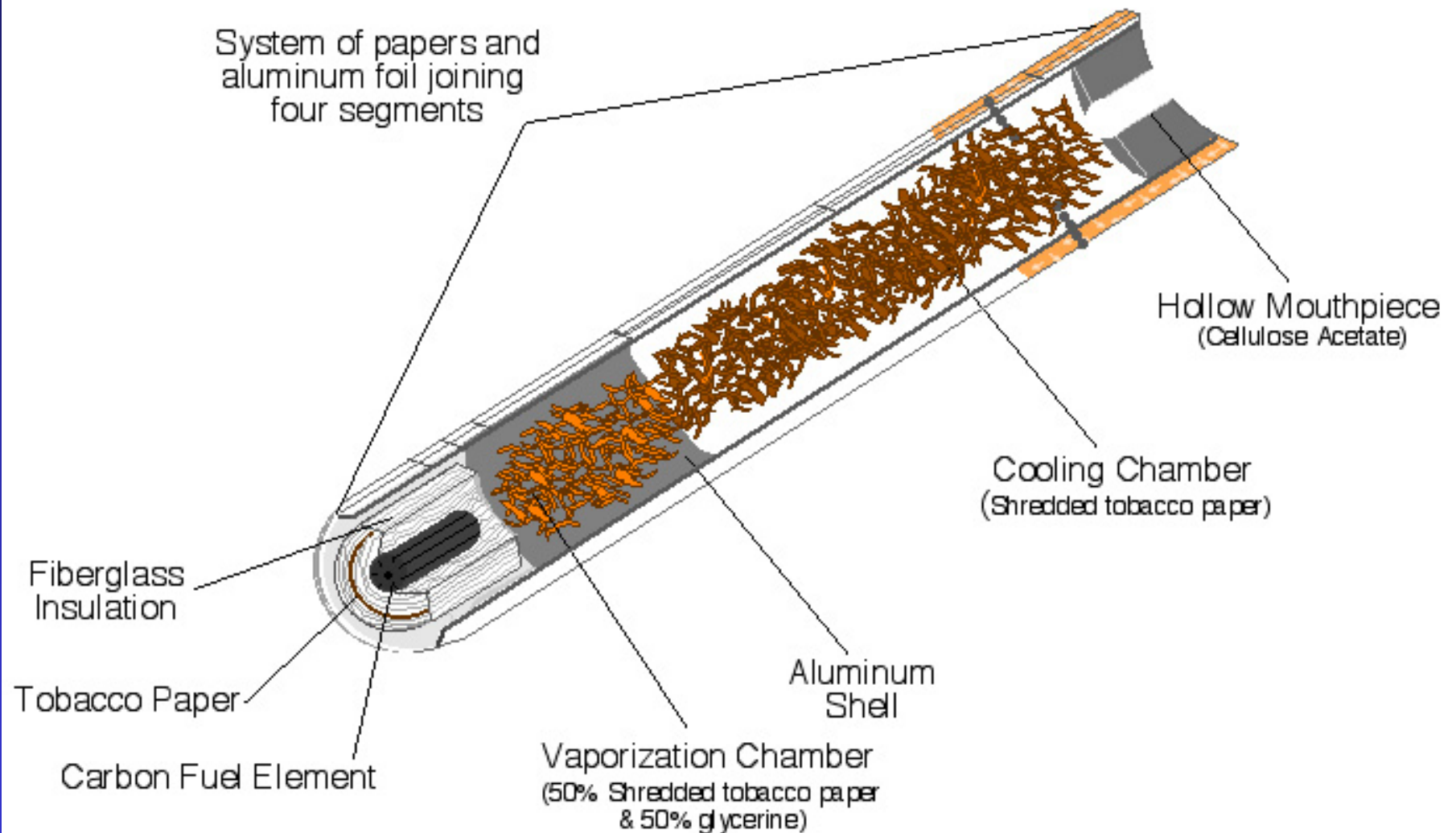
**1** Low Nicotine      **2** ExtraLow Nicotine      **3** Nicotine Free

**Make it your Quest.**

# Eclipse (RJ Reynolds)



# R.J. Reynolds "Eclipse" Nicotine Delivery System





Discover the  
difference.

A cigarette that  
may present less  
risk of cancer,  
chronic bronchitis  
and possibly  
emphysema.\*

\*Eclipse is not perfect. For cancer, we found that Eclipse presents a lower risk than other cigarettes. However, there is no conclusive evidence on the risk of chronic bronchitis and emphysema. As a general rule, all cigarettes present some health risks, including Eclipse.

eclipse

No lingering odor. 80% less secondhand smoke.  
The difference is worth discovering.

[eclipse.rjrt.com](http://eclipse.rjrt.com)

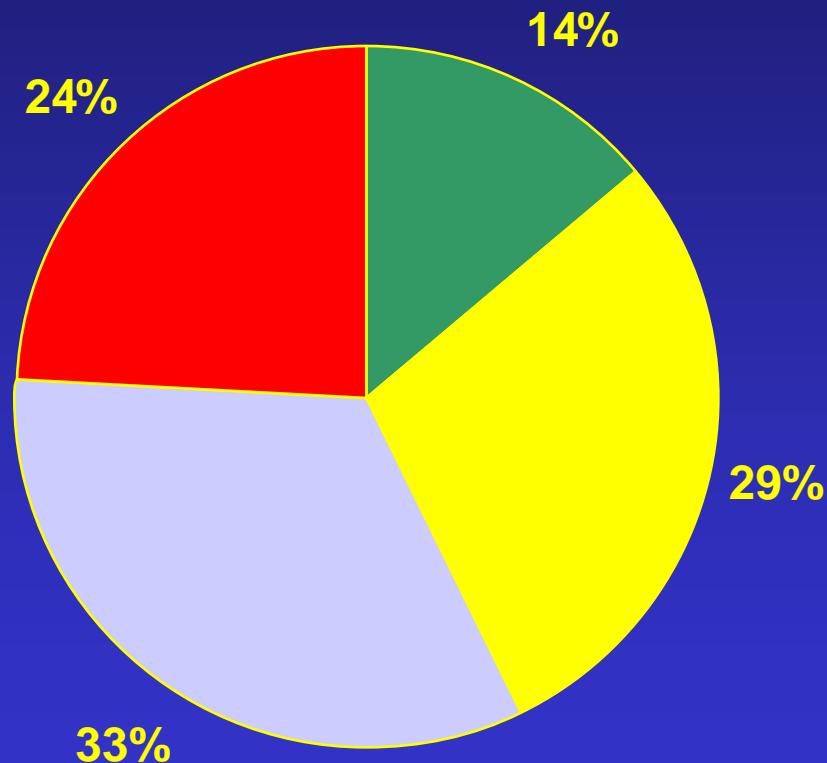
Log on to find retailers near you and get a special introductory offer.

**SURGEON GENERAL'S WARNING: Cigarette  
Smoke Contains Carbon Monoxide.**

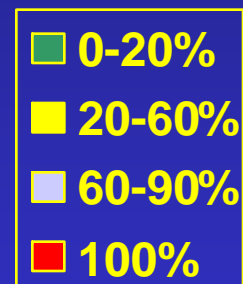
BOX, MENTHOL BOX: 4 mg. "tar", 0.1 mg. nicotine, av. per cigarette  
by FTC method, as modified by RJRT to accommodate the unique  
design of Eclipse. For more product information, visit [www.rjrt.com](http://www.rjrt.com).

# Perceived Safety of Eclipse Compared to Regular Cigarettes

**57% believe  
60-100% of  
risk is  
eliminated!**

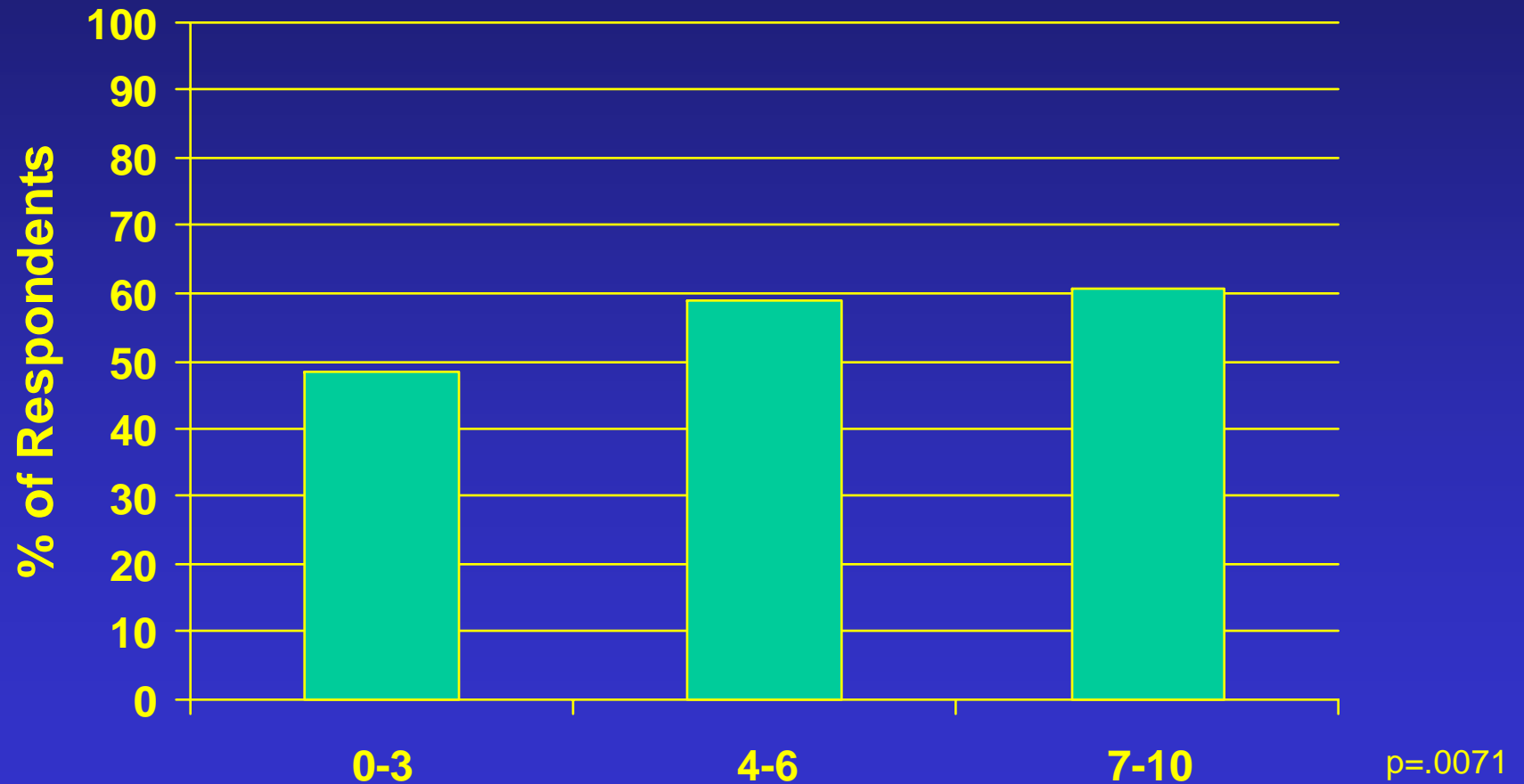


**% reduction  
in risk**





# Eclipse Purchase Interest Related to Interest in Quitting



# Accord (Philip Morris)



# SCoR (Philip Morris)

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- SCoR stands for “Smoke Constituent Reduction”
- Anticipate broader range of toxin reductions than Omni or Advance
- Various focus groups suggest this is what smokers have been waiting for (i.e. reduced risk Marlboro)
- Internal PM documents explain the challenges faced in trying to reduce toxin delivery of a combusting cigarette
  - Disease risk profiles
  - Smoke chemistry
  - Consumer perception
  - Mutagenicity
  - Consumer research

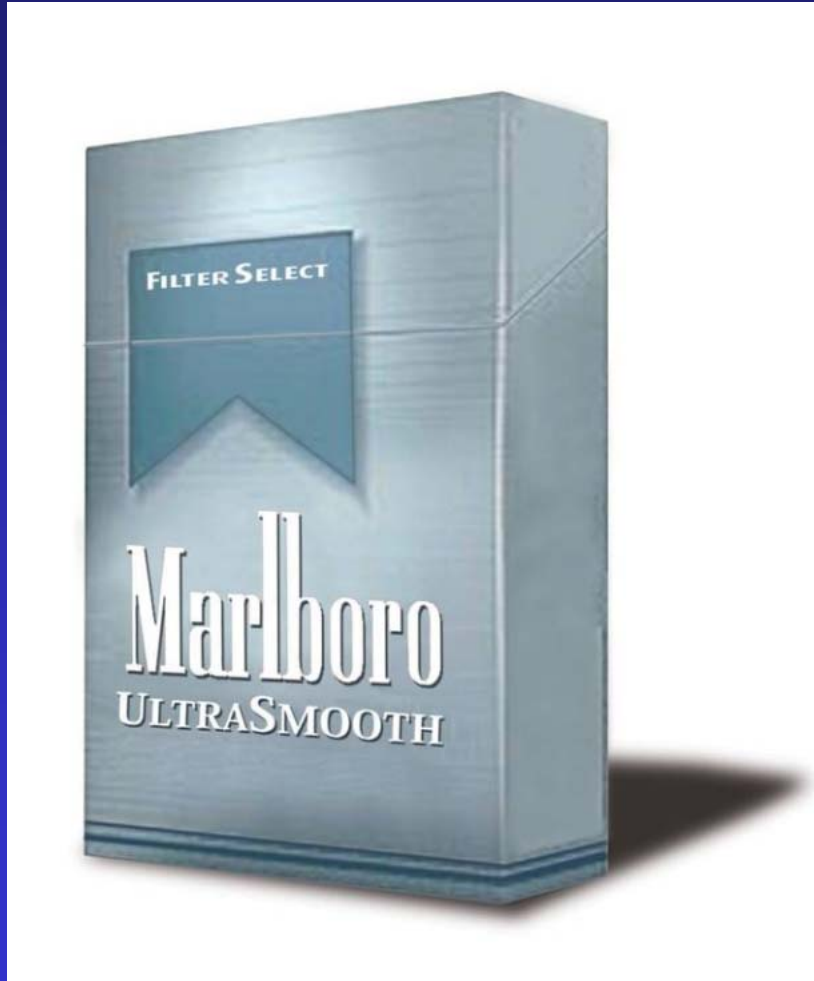
# PM's Current Plans For SCoR

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- 9/9/04 announcement: ScoR to be test-marketed without any claims “in order to gauge adult smoker acceptance of taste and flavor”
- But the next day's headlines read “Philip Morris Continues To Test Reduced Risk Cigarettes”
- SCoR has launched in Atlanta, Salt Lake City, and Tampa as “Marlboro UltraSmooth,” in North Dakota as Marlboro UltraLight,” and in Philadelphia as Parliament Blue without explicit reduced exposure or risk claim
- Other messaging includes:
  - “Filter Select”
  - “Its new carbon filter lets the flavor through for a filtered smooth taste”

# Marlboro UltraSmooth

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# Consumer Interest in SCoR

Telephone poll of 1000 US smokers, April 2003, exposed to a concept for the “brand they currently smoke”

- 63 percent of smokers are interested in SCoR
  - *66% of those “very or somewhat likely” to quit*
  - *28% of ex-smokers who quit within the last 2 years*
- 78 percent said that reducing the risk of smoking was an important reason to try SCoR
- 66 percent agreed that using SCoR would let them put off quitting for now

# Camel Snus



Source: Reynolds



Photo from Portland, OR retail outlet



MY PROFILE - NEED HELP? - EXIT

# CAMEL SNUS

WARNING:  
THIS PRODUCT  
MAY CAUSE  
GUM DISEASE AND  
TOOTH LOSS

WHAT'S SNUS? \* HOW TO SNUS \* WHERE TO SNUS \* SNUS FAQS \* TELL US WHAT YOU THINK

to enjoy Snus  
**where**

At a concert  
(right in front of Security) ...

On a jet  
from Miami to L.A. ...

At a bar, at a club,  
even an over-priced  
Tapas restaurant.

CAMEL SNUS  PLEASURE FOR WHEREVER

This is the official website for Camel SNUS.  
R.J. Reynolds Tobacco Company only markets its tobacco products to legal age tobacco consumers. In order to be eligible to receive

Edit View Go Bookmarks Tools Help

http://www.snuscamel.com/CSN/home/where\_to.jsp

Getting Started Latest Headlines Dodge - Bridge - Veh...

MY PROFILE - NEED HELP? - EXIT

**CAMEL  
SNUS**

WARNING:  
THIS PRODUCT  
MAY CAUSE  
GUM DISEASE AND  
TOOTH LOSS

WHAT'S SNUS? \* HOW TO SNUS \* WHERE TO SNUS \* SNUS FAQS \* TELL US WHAT YOU THINK

to enjoy Snus  
**where**

We found it all the way  
in Sweden

Home of the world's best

MEATBALLS

MASSAGE

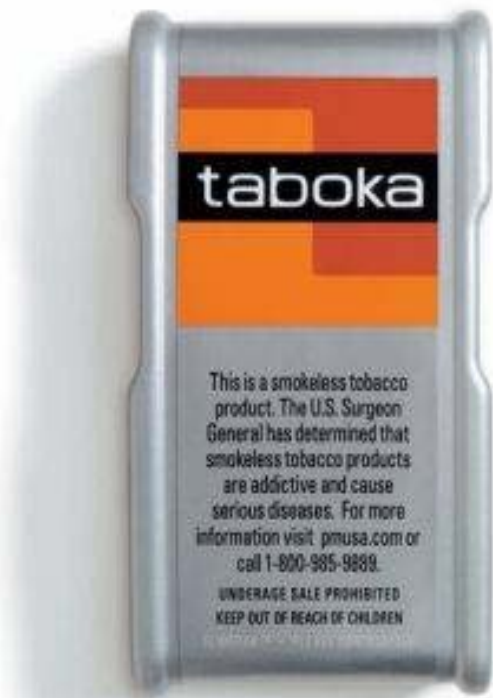
& BLONDES

C A M E L S N U S  P L E A S U R E F O R W H E R E V E R

This is the official website for Camel SNUS.  
R.J. Reynolds Tobacco Company only markets its tobacco products to legal age tobacco consumers. In order to be eligible to receive

www.snuscamel.com

# Taboka



# Marlboro Snus



# Ariva Cigaretts “Medical” Packaging



# Revel (UST)



The advertisement is presented on a dark blue background. It features three main vertical panels. The left panel shows a pack of REVEL Wintergreen tobacco, with the brand name 'REVEL' in large white letters, 'WINTERGREEN' in smaller white letters, and 'TOBACCO PACKS FOUR COUNT' in white on a dark green background. A gold warning label at the bottom reads 'WARNING: THIS PRODUCT MAY CAUSE GUM DISEASE AND TOOTH LOSS'. A red vertical label on the right side of the pack says 'FREE SAMPLE NOT AVAILABLE TO MINORS TO OPEN PACKS ALONG DOTTED LINE'. The right panel shows a pack of REVEL Mint tobacco, with 'REVEL' in large white letters, 'MINT' in smaller white letters, and 'TOBACCO PACKS FOUR COUNT' in white on a dark blue background. A gold warning label at the bottom reads 'WARNING: THIS PRODUCT MAY CAUSE GUM DISEASE AND TOOTH LOSS'. A red vertical label on the right side of the pack says 'FREE SAMPLE NOT AVAILABLE TO MINORS TO OPEN PACKS ALONG DOTTED LINE'. The central panel has a white header with the text 'ATTENTION ADULT SMOKERS: There's something to smile about!' above a photograph of a smiling man and woman. Below the photo, the word 'WINTERGREEN' is written in large white letters on a dark green background, and 'MINT' is written in large white letters on a dark blue background.

ATTENTION  
ADULT SMOKERS:  
There's something  
to smile about!

**REVEL**  
WINTERGREEN  
TOBACCO  
PACKS  
FOUR COUNT

WARNING: THIS PRODUCT  
MAY CAUSE GUM DISEASE  
AND TOOTH LOSS

FREE SAMPLE  
NOT AVAILABLE TO MINORS  
TO OPEN PACKS ALONG DOTTED LINE

**REVEL**  
MINT  
TOBACCO  
PACKS  
FOUR COUNT

WARNING: THIS PRODUCT  
MAY CAUSE GUM DISEASE  
AND TOOTH LOSS

FREE SAMPLE  
NOT AVAILABLE TO MINORS  
TO OPEN PACKS ALONG DOTTED LINE

**WINTERGREEN**

**MINT**

**NEW**

**REVEL**  
MICROBURN  
TOBACCO FREEZ

**REVEL**  
TOBACCO FREEZ

DISCREET, SMOKE-FREE  
TOBACCO SATISFACTION.  
FEEL FREE TO REVEL.

WARNING: THIS PRODUCT IS NOT A  
SAFE ALTERNATIVE TO CIGARETTES

We discovered  
a discreet  
new way  
to enjoy  
tobacco  
instead of  
lighting  
up.

**FREE  
SAMPLE**



# Skoal and Copenhagen (UST)

**The year to stop smoking is here.**

**“Giving up the smoke while still enjoying tobacco is a pleasant surprise.”**

**“A refreshing resolution.”**

Dry, discreet packs in unique flavors

**No spit. No smoke. No boundaries.**

**SAVE WITH COUPON ON BACK.**

**NEW FOR ADULT SMOKERS!**  
REGULAR  
**SKOAL DRY™**  
TOBACCO PACKS

**NEW FOR ADULT SMOKERS!**  
CINNAMON  
**SKOAL DRY™**  
TOBACCO PACKS  
NO SPIT • NO SMOKE

**NEW FOR ADULT SMOKERS!**  
MENTHOL  
**SKOAL DRY™**  
TOBACCO PACKS  
NO SPIT • NO SMOKE

**WARNING:**  
THIS PRODUCT MAY CAUSE MOUTH CANCER

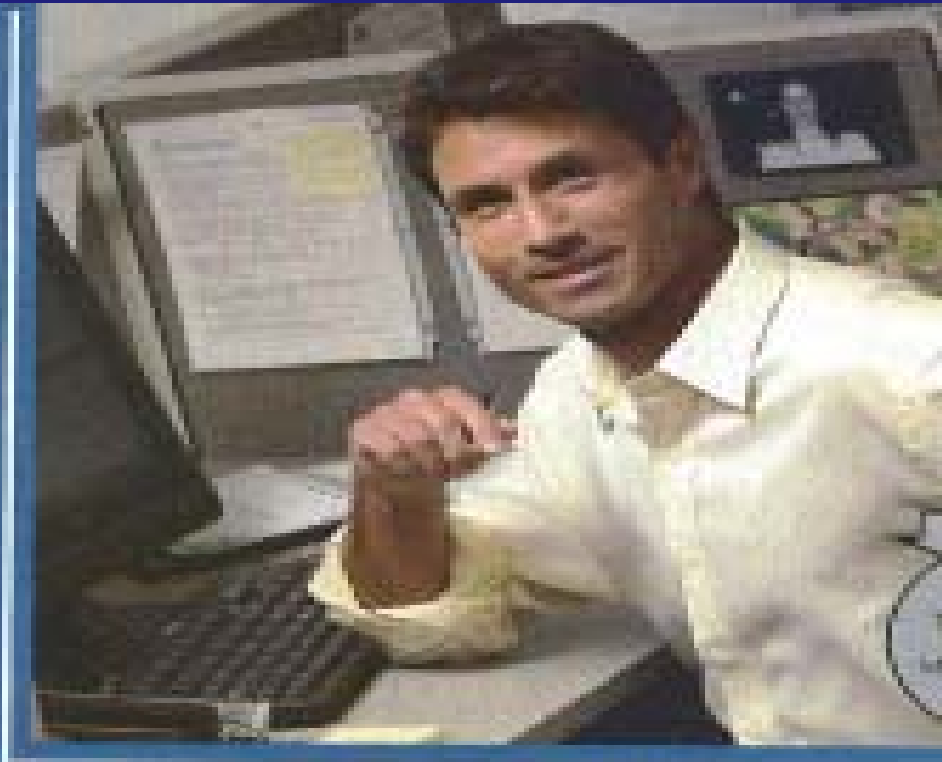
**U.S. SMOKERS' TOBACCO CO.**  
NOT FOR SALE TO MINORS

U.S. Smokers' Tobacco Co. Skoal is a registered trademark of U.S. Smokeless Tobacco Co. or an affiliate. ©2006 U.S. Smokeless Tobacco Co.

**SkoalDry.com**

# Skoal and Copenhagen (UST)

**WITH ALL THE SMOKING AREAS REMOVED FROM THE BUILDING, PHIL KNEW HIS BEST OPTION WAS TO HEAD STRAIGHT FOR THE NEXT PAGE.**



# THE SOLUTION.



Enjoy tobacco the smoke-free way with Skoal® or Copenhagen®. Copenhagen offers legendary natural tobacco flavor, while Skoal is available in a wide variety of great tasting flavors that are sure to satisfy. They also make it easy to enjoy tobacco in your own terms. Try a rich satisfying pinch of long cut, or enjoy the convenience of easy-to-use pouches.

Maybe it's time you find your solution – and leave the smoke behind.

**BREAK FROM THE PACK.™**



# Why We Are So Concerned



孩子眼中的世界——一切都高高在上，他们更需要被平等的注视。  
请在与他们交流时，放低你的身姿。

低一点，更多关爱！

低危害卷烟给您更多关爱！

中南海  
LIGHTS

卷烟，享受与危害的矛盾体。  
中南海始终致力于卷烟低危害技术和产品的研究与开发。每一款产品都凝结了世界领先的低危害卷烟生产技术，为您的吸烟生活提供健康保证。

# Why We Are So Concerned



A little lower means more loving care! Low-harm cigarettes give you more loving care! Cigarettes contain conflicting elements of pleasure and harm. Zhongnanhai has always focused on research and development of low-harm cigarette technology. Every product fuses the world's most advanced low-harm cigarette technology, offering a guarantee of health for your smoking life.

(Advertisement for Zhongnanhai Lights Cigarettes published in the September, 2006 issue of the company's monthly magazine Zhongnanhai World.)

# And Let's Give Wall Street The Last Word...

- "...if there is an opportunity to develop a reduced-risk cigarette that of course, burns, and tastes very similar to conventional cigarettes, **this could possibly prevent people from quitting and may encourage some people to start smoking.**"

Salomon Smith Barney, April 2002  
(emphasis added)