

# **Chapter 6**

## **Changing Smokeless Tobacco Products and Marketing Practices by Industry**



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### Introduction

Cigarette markets are declining in high-income economies such as North America and Europe due in large part to effective tobacco control policies. Implementation of demand-reduction policies called for in the World Health Organization Framework Convention on Tobacco Control (WHO FCTC)—such as smoking restrictions in public spaces, enhanced health warnings, increased taxes, and increased support for smoking cessation—are likely to further constrict these cigarette markets and slow the increase in smoking in low-income countries.<sup>1</sup> However, these changes also open opportunities for the tobacco industry to expand into new areas. Societal pressures discouraging cigarette use may impel smokers to use other forms of tobacco, for example. Such changes have precedent, as over time different forms of tobacco have seen changes in popularity among users (e.g., nasal snuff, pipes, cigars).<sup>2,3</sup> Econometric analyses<sup>4</sup> have examined the latent (i.e., untapped or potential) demand for smokeless tobacco (ST) in different world regions, concluding that demand would be highest in Asia and the Middle East (US\$3.97 billion), followed by North America (US\$2.82 billion) and Europe (US\$2.78 billion). Thus, there is incentive for producers to bring new products to market and to expand into areas where ST products are not currently used.

Smokeless tobacco covers a wide range of products used orally or nasally. A number of other reports<sup>5-11</sup> and chapter 3 of this volume have examined the variety of ST products and their contents. This chapter will not address product variety and contents in depth, but will focus on data on marketing practices available mostly from high-income countries.

Since 2001, a number of manufacturers have introduced novel ST products that differ in numerous ways from traditional products (Table 6-1). Manufacturers have introduced products that are formulated differently (e.g., with reduced nitrosamines, in dissolvable form, spitless) and marketed differently (made available in new markets, targeted toward current smokers, contained in innovative packaging) relative to the traditional ST products in a given market. For example, introduction of snus products in the United States or South Africa would be considered novel, but emergence of new Swedish snus brands in Sweden probably would not fit this description.

Also since 2001, companies that historically had predominantly marketed cigarettes have entered the ST market. R.J. Reynolds purchased Conwood, manufacturer of Grizzly and other popular moist snuff products, in 2006. British American Tobacco began test marketing snus products in 2006. In 2009, Altria acquired U.S. Smokeless Tobacco (UST), thereby gaining control of UST's best-selling Skoal and Copenhagen brands. Philip Morris International (PMI) entered into an agreement with Swedish Match in 2009 to market ST outside the United States and Scandinavia (as of 2012, test-marketing in Canada and Russia). PMI also purchased the South African operations of Swedish Match in 2009. Consequently, a number of ST products co-branded with cigarettes have emerged, which represents an additional layer of novelty.

## 6. Changing Smokeless Tobacco Products and Marketing Practices by Industry

**Table 6-1. Novel smokeless tobacco products introduced since 2001**

Brand	Type	Company	Country	Year	Still sold?
Revel	Snus	UST	United States	2001	No
Exalt	Snus	Swedish Match	United States	2001	No
Catch	Snus	Swedish Match	South Africa	2001	No
Ariva*	Dissolvable	Star Scientific	United States	2001	No
Stonewall*	Dissolvable	Star Scientific	United States	2003	No
Interval	Dissolvable	Brown and Williamson	United States	2003	No
Magne*	Snus	Swedish Match	South Africa	2003	No
Tobaccorette	Snus	Swedish Match	South Africa	2003	No
Skool Dry	Snus	UST	United States	2006	No
Taboka	Snus	Philip Morris U.S.A.	United States	2006	No
Camel Snus	Snus	Reynolds American/Japanese Tobacco International	United States, Sweden	2006	Yes
Peter Stuyvesant	Snus	BAT	South Africa	2006	No
Lucky Strike	Snus	BAT	South Africa, Sweden	2006	No
Triumph	Snus	Lorillard/Swedish Match	United States	2007	No
Grand Prix	Snus	Lorillard/Swedish Match	United States	2008	No
Tourney	Snus	Liggett Group/Snus AB	United States	2007	No
Marlboro Snus	Snus	Philip Morris U.S.A.	United States	2007	Yes
General	Snus	Swedish Match	South Africa, United States, Canada	2008	Yes
Catch Dry	Snus	Swedish Match	South Africa	2008	No
du Maurier	Snus	Imperial Tobacco (BAT)	Canada	2008	No
Pall Mall	Snus	BAT	Sweden	2009	No
Camel Orbs	Dissolvable	Reynolds American	United States	2009	Yes
Camel Sticks	Dissolvable	Reynolds American	United States	2009	Yes
Camel Strips	Dissolvable	Reynolds American	United States	2009	Yes
Skool	Snus	UST	United States	2010	Yes
Zip	Snus	West African Tobacco	Nigeria	2010	Yes
Marlboro Sticks	Dissolvable	Philip Morris U.S.A.	United States	2011	Yes
Skool Sticks	Dissolvable	UST	United States	2011	Yes
Marlboro	Snus	Swedish Match	Sweden	2011	Yes
Ettan	Snus	Swedish Match	United States	2011	Yes

\*Star Scientific discontinued its dissolvable products in early 2013.

Abbreviations: UST = U.S. Smokeless Tobacco Company; BAT = British American Tobacco.

Note: This table is intended as an overview of novel products introduced; it is not necessarily comprehensive as there is no formal mechanism on a global scale for reporting new smokeless tobacco products.

The tobacco market into which these novel products are being launched is influenced to a certain extent by the success of traditional tobacco control activities, such as smoke-free environments, high cigarette taxes, and increased awareness of the health effects of tobacco use.<sup>12</sup> Smokeless tobacco products have engendered controversy within the tobacco control community. Some public health advocates see ST as a substitute for cigarettes and a bridge to quitting, whereas others view it as a step toward smoking and a perpetuator of nicotine addiction through multiple product use.<sup>13–16</sup> These views are not necessarily mutually exclusive. Some models of the population impact of ST suggest that increased promotion of ST could draw smokers away from cigarettes with minimal offsetting use by non-smokers, former smokers, or youth.<sup>17</sup> Other models suggest that even aggressive ST promotion may have no public health benefits.<sup>18</sup>

In the United States, the Family Smoking Prevention and Tobacco Control Act gives the U.S. Food and Drug Administration (FDA) the authority to regulate the marketing of tobacco products to protect public health. The Act specifically prohibits “modified risk” claims for tobacco products in the absence of a marketing order from FDA. The Act also instructs that FDA only issue a marketing order if the applicant has met certain conditions, including a demonstration that the novel product will result in significantly reduced harm for tobacco users and will benefit the health of the population as a whole.<sup>19,20</sup> A recent Institute of Medicine report provides a broad framework for thinking about the evaluation of such claims, but there is not yet a scientific consensus about the specific methods to be used or the threshold of evidence that should be required.<sup>21</sup>

Understanding potential users of products is the realm of consumer psychology, which integrates behavioral and social sciences to understand the purchasing behaviors of specific segments of the population and methods to enhance these behaviors.<sup>22,23</sup> Marketing can be viewed in part, then, as the practical application of consumer psychology. Traditionally, marketing is conceived as a mix of “4 P’s”: product, price, placement, and promotion—that is, products are designed to meet consumer needs at a desirable price and are promoted effectively using multiple communication channels in places where consumers can interact with the product. This chapter explores the available research on the changing ST market, focusing primarily on the marketing of ST in new forms and in new ways, and how these influence the appeal of such products to consumers. The chapter is framed around these four primary aspects of marketing as they relate to the changing ST market: product, promotion, placement, and price.

### Product

The characteristics and performance of a product can greatly influence its overall attractiveness. Smokeless tobacco products can be differentiated from one another most clearly in terms of product design, which may be tailored to achieve chemosensory effects and nicotine delivery targets and paired with marketing to appeal to varied subpopulations (women, youth, African Americans, people of low socioeconomic status). Over the past two or three decades, there has been substantial innovation in the ST market, particularly in North America and Sweden. In this section, we focus on three key areas that are likely to influence the attractiveness of novel ST products: product formulation, nicotine content and availability, and flavorings.

### Product Formulation

An obvious difference among ST products is the form in which the products are presented for use. The tobacco in individual products can range from simply dried, cured tobacco leaves cut or torn in various ways, to moistened, fermented tobacco strips, to finely powdered dry tobacco. At present, most ST consumed in the United States is in the form of moist snuff, which is fermented, whereas in Sweden most ST is in the form of non-fermented, pasteurized Swedish snus. In both countries, loose product dominates, though portioned forms are growing in popularity. More novel ST formulations, available in the United States, include powdered tobacco compressed into different shapes, such as tablets, sticks, or thin strips.

Portioned pouch products were introduced in Sweden in the 1970s and in the United States with Skoal Bandits in 1983. These products were explicitly developed to be easier to use, neater, and more appealing to novice users.<sup>24,25</sup> In Sweden, pouches generally come in two forms: original, where the pouch is moistened and appears brown; and white, which is not premoistened and appears white. Three sizes (mini [0.5 g], normal [1 g], maxi [approximately 1.7 g]) are available. U.S. smokeless tobacco manufacturers began introducing products patterned after Swedish snus in the early 2000s, and as of 2011, Marlboro Snus, Skoal, General, and Camel Snus were in national distribution. In all cases, U.S. snus products have been introduced in portioned pouches, similar to the Swedish white portioned format. In 2012, Camel Snus was available in two portion sizes (approximately 0.5 g and 1.0 g). Swedish and U.S. snus products differ in nicotine levels and pH, and studies have even shown regional variation among U.S. snus products.<sup>5,8,26</sup> (Information on toxicant levels is provided in chapter 3.)

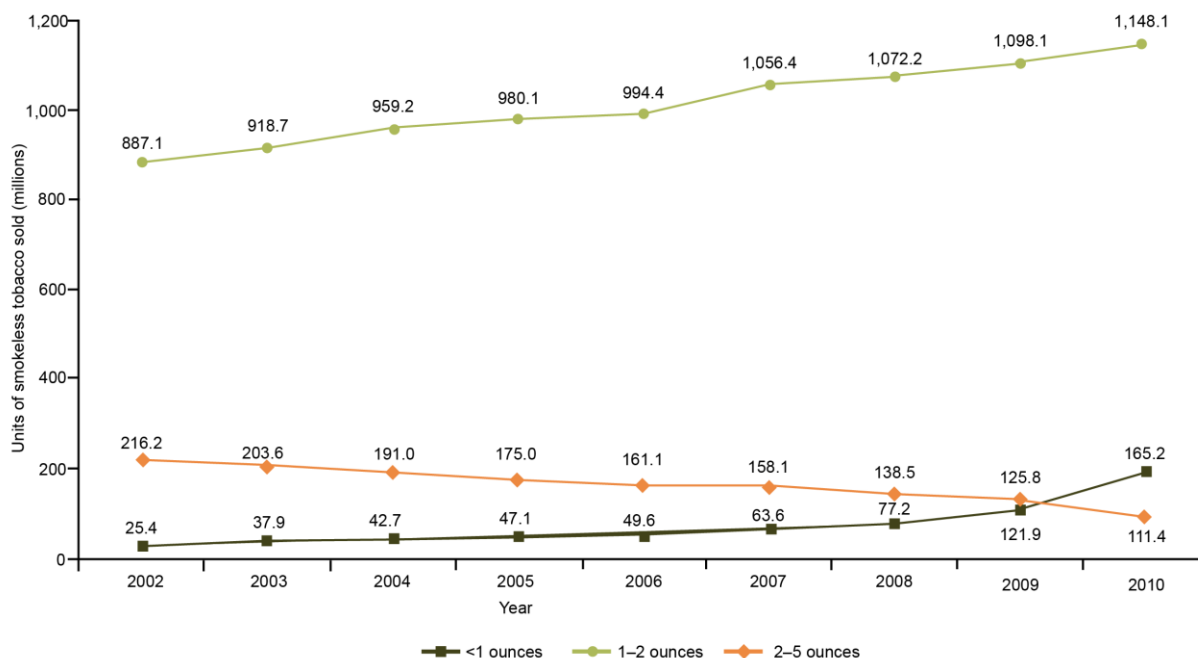
Compressed formulations of powdered tobacco specifically designed to dissolve in the mouth are among the ST products that have emerged in the United States during the 2000s. Two early examples, which are no longer available on the U.S. market, are Star Scientific's Ariva (introduced in 2001) and Stonewall (introduced in 2003). In 2009, Reynolds American introduced three dissolvable tobacco products, Camel Orbs (a lozenge), Camel Sticks (a thin, 4-inch stick), and Camel Strips (a thin, rectangular sheet). In 2011, Philip Morris U.S.A. and UST introduced Marlboro and Skoal Sticks, respectively, which consist of a small amount of finely milled tobacco applied to a toothpick-sized wooden dowel. Such products have attracted considerable concern because of their physical similarity to confectionary products and the ease with which use can be concealed, potentially making them attractive to youth.<sup>27</sup> An additional concern with such products is accidental ingestion by young children, which happens most commonly with cigarettes, followed by traditional smokeless tobacco.<sup>28</sup> To date, analyses of poison control center data find little evidence of specific problems with the ingestion of dissolvables,<sup>29</sup> although it is unclear how much of the apparently low rate of accidental ingestion of dissolvables can be attributed to their low prevalence of use or to the appeal and safety of their packaging for children.

Novel products typically weigh less (net weight of product, without packaging) than traditional snuff products, thus data tracking ST sales can only give hints about sales trends. For example, in the United States, moist snuff is typically packaged in approximately 1.2-ounce (oz) (34.0 g) cans. In contrast, a tin of Camel Snus weighs about 0.32 oz; a box of Ariva weighed about 0.34 oz. Data from 2002–2010 reported to the U.S. Federal Trade Commission (FTC) show changes in sales of ST by the size of package (Figure 6-1; package sizes up to 5 oz shown only, as these are the most common).<sup>30</sup> Sales of



ST products sold in units weighing less than 1 oz (which would include most novel ST products) grew more than sixfold between 2002 and 2010. In 2010, disclosures of product-level data for sales of snus and dissolvables were required. Snus sales in that year totaled 61.3 million units, 99.9% of which were less than 1 oz in size.<sup>30</sup> Among ST products weighing less than 1 oz, snus made up over one-third (37%) of ST sales in 2010.

Figure 6-1. Change in smokeless tobacco sales by weight class, 2002–2010, United States



Source: U.S. Federal Trade Commission 2012 (30).

### Consumer Responses to Different Product Formats

Research comparing consumer responses to novel ST products with responses to conventional cigarettes or nicotine replacement products has yielded varying results. One study of Ariva found that it was preferred by smokers over a pure pharmaceutical nicotine lozenge.<sup>31</sup> A different study showed that novel ST products had drug effects, liking measures, and nicotine-withdrawal symptoms similar to those of pharmaceutical lozenges, and use of pharmaceutical lozenges resulted in lower craving scores than those observed with one of the novel tobacco products.<sup>32</sup> Examinations of biomarkers found evidence that users of the novel products had been exposed to as much nicotine as in the pharmaceutical lozenges, but there was little evidence of exposure to nitrosamines.<sup>33</sup> Carpenter and Gray<sup>34</sup> found that use of Ariva and Stonewall was associated with a reduction in cigarette consumption and an increase in intentions to quit among smokers who received these products compared to the smokers who didn't receive them.

An emerging theme from research on use of novel ST products is that sampling of different types of ST products may be important in assessing appeal to cigarette smokers.<sup>35,36</sup> Hatsukami and colleagues<sup>35</sup> showed that after 2 weeks of sampling oral products (General snus, Camel Snus, Marlboro Snus, Ariva,

Stonewall), smokers rejected General snus, and showed no significant preference for any of the other products (i.e., about 25% chose to use each of the products other than General). When the smokers quit smoking, those using Camel Snus reported greater relief of cravings and withdrawal symptoms compared to those using other oral products. O'Connor and colleagues<sup>36</sup> showed that when smokers not intending to quit were allowed to sample multiple products (Stonewall, Marlboro Snus, Camel Snus, Commit lozenges) simultaneously for 1 week followed by 1 week of preferred product use, the smokers most preferred the pharmaceutical nicotine lozenge and least preferred Stonewall. Interestingly, in the 2011 relaunch of Camel dissolvables, Reynolds American offered a variety pack containing all three versions of the product, presumably so consumers could try all three with less investment to find a type that suited them. This is also consistent with approaches used by UST to attract new users to Skoal Bandits: One-on-one sampling was identified as the “number one objective” for sales staff.<sup>37</sup>

### Nicotine Content and Availability

Nicotine is the *sine qua non* for tobacco use in any form. The form of the product may have distinct effects on the form of nicotine (bound vs. free nicotine) and its delivery to the body. A prime example is the manipulation of acid/base chemistry to affect the proportion of free nicotine in the mixture, which impacts systemic absorption.<sup>5,38</sup> Specifically, free nicotine is readily absorbed across mucous membranes, leading to rapid uptake into the brain, thus enhancing centrally mediated nicotine reward. Manufacturers can use buffering agents and salts to raise pH and thereby raise the level of free nicotine in a product (or use these agents to lower pH and lower the amount of free nicotine). Lauterbach and colleagues<sup>39</sup> note that the measurement of free nicotine in ST may be complicated by other elements of the mixture (such as salts, pectins). Makers of custom-made products also manipulate the pH of their products when they add alkaline substances such as punk ash and slaked lime (calcium hydroxide) to products such as iqmik (used by Alaskan Natives), South African custom-made snuff, betel quid, and mawa. In manufactured products, there may be tiers of products at different pH levels.<sup>37,40</sup>

Variation of product pH (and thus free nicotine) was central to the “graduation” strategy pursued by UST in the 1980s.<sup>37</sup> Low-pH, low-nicotine products (e.g., Skoal Bandits) introduced novice users to product use, and as they developed tolerance to nicotine and experienced other effects, users would gravitate toward increasingly higher nicotine products, such as Skoal Fine Cut, and eventually to Copenhagen. One UST ad campaign explicitly stated: “Sooner or later, it’s Copenhagen. It satisfies.” UST was not alone in this approach of multiple product offerings: Pinkerton Tobacco and Conwood offered similar opportunities for graduation.<sup>37</sup>

Relatively few studies, however, have directly examined whether levels of free nicotine in ST influence how attractive a product is to consumers. Alpert and colleagues<sup>41</sup> linked reported free nicotine levels to ST prevalence and market sales data, and concluded that “changes in design, as reflected by variation in free nicotine associated with pH or tobacco leaf, or both, have enhanced the ease and uniformity of dosing,”<sup>41,p.332</sup> which likely contributes to growth in sales of moist snuff. Fant and colleagues<sup>42</sup> and Kotlyar and colleagues<sup>32</sup> showed that product pH appeared to relate to the level of nicotine absorbed. Subjective measures of product strength and satisfaction also followed a similar pattern. Kotlyar’s study included Ariva, Revel, and Stonewall, all of which delivered less nicotine and had lower scores of subjective effects than Copenhagen moist snuff.

As novel ST products emerge and are promoted to smokers, there is concern that snus-type products sold in the United States and South Africa, having been shown to contain much lower free nicotine,<sup>8,43</sup> may not relieve nicotine craving and may promote dual use. Indeed, Hatsukami and colleagues<sup>35</sup> showed that among smokers who abstained from smoking and switched to ST, products with lower nicotine levels did not suppress smoking behavior as well as products with higher levels of nicotine. Yet a separate study shows that products with higher nicotine levels may be more likely to be misused or cause dependence.<sup>44</sup>

### Flavorings

Smokeless tobacco preparations may range from simple unflavored tobacco to tobacco with added flavorants (such as wintergreen, apple, bourbon) to more complex mixtures of tobacco with additional plant materials (herbs, spices, leaves, nuts).

In North America, traditional chewing tobacco is either unflavored or incorporates some sweetener (e.g., molasses). Moist snuff traditionally was available unflavored or with the addition of wintergreen (methyl salicylate).<sup>45</sup> This began to change in the 1970s, however, as UST and others introduced moist snuff products with a far greater variety of flavors, including citrus, berry, apple, bourbon, and spice. In Sweden, common Swedish snus flavorants include mint/wintergreen, licorice, juniper berry, and eucalyptus. The flavors used in snus products in South Africa include coffee, tropical fruits, mint, and eucalyptus. Emerging dissolvable tobacco products have been marketed with flavors including mint and coffee. Chemical analysis of Camel dissolvables identified flavorants such as coumarin, vanillin, and cinnamaldehyde, along with sweeteners such as sorbitol and xylitol.<sup>46</sup> As of September 2009, FDA regulations banned the use of characterizing flavors other than menthol in cigarettes but not in other tobacco products, including smokeless tobacco.

The issue of flavors with oral ST products adds another dimension to exposure assessment because the flavorants themselves are ingested along with the tobacco. Chen and colleagues<sup>45</sup> measured the mint and wintergreen contents of leading U.S. moist snuff products and showed that these products contained far more of these flavorants than are found in hard candies; a typical ST user could ingest up to 12 times the acceptable daily level. Additionally, ST products may contain additives prohibited for use in food. For example, coumarin, identified in Camel Mellow Orbs,<sup>46</sup> is banned as a food additive due to its liver toxicity.

### Promotion

Advertising and promotion are the most visible methods for fostering the growth of a market and attracting new customers, often through creating a specific brand image (i.e., glamour, sophistication, ruggedness, convenience, use of the latest technology).<sup>47–49</sup> Marketing messages can underscore desirable design features, such as flavorings, ease of use, and nicotine delivery, potentially increasing products' attractiveness.<sup>50</sup> New marketing approaches helped revive the snus market in Sweden beginning in the late 1960s. At the time, the median age of Swedish snus users was over 40 years, but new product development and intensive promotion by Swedish Match increased snus use among young Swedish men, so that by 1973 the median age of Swedish snus users had declined to 30 years.<sup>51</sup> In 1999, Swedish Match divested its cigarette business to focus on other tobacco products, primarily Swedish

snus and cigars.<sup>52</sup> In the United States, UST aggressively promoted moist snuff starting in the mid-1970s in an attempt to reach a younger market and combat declines in use over the course of the early 20th century.<sup>37,53</sup> This strategy was successful, as ST use among young men increased ninefold between 1970 and 1987.<sup>54,55</sup> In 2010, the major U.S. smokeless tobacco companies spent US\$257,879,187 advertising and promoting moist snuff, and an additional US\$57,394,000 advertising and promoting snus. In terms of return on investment, these companies spent \$0.11 in advertising and promotion for every \$1.00 in sales of moist snuff, and \$0.70 for every \$1.00 in snus sales.<sup>30</sup>

### **Evolving Target Markets**

A key way for manufacturers to grow the ST market is to attract new groups of users. Mejia and Ling<sup>56</sup> have reviewed tobacco industry documents examining U.S. smokeless tobacco user characteristics dating back to the 1960s. They note that historically, ST use was concentrated in low-income, less-educated, white males, though an increase in use was observed in the 1990s among more active males engaged in outdoor activities such as hunting and fishing. Product marketing in the 2000s sought to expand beyond these traditional groups and attract more upscale, urban, and female users. Since about 2010, the ST industry has shifted its magazine advertising from men's sporting magazines to magazines with more general readership,<sup>57</sup> presumably in an attempt to broaden the appeal of ST beyond white males.

### **Smokers**

One potential user group of interest is current cigarette smokers, who are already familiar with tobacco use (and addicted to nicotine). Smokeless tobacco manufacturers, at least in the United States, have been targeting smokers for the past few decades.<sup>58</sup> For example, advertising for Skoal Bandits in 1983 encouraged smokers to “Take a Pouch, Not a Puff.” Marketing to smokers increased with the proliferation of workplace and public space smoking restrictions in the United States through the 1980s and 1990s.

Reviews of tobacco industry documents reveal the extent of the research the industry conducted on developing ST products that could attract smokers.<sup>59</sup> These reviews note that while manufacturers initially considered capturing those smokers who might otherwise quit smoking and converting them to ST alternatives, the manufacturers eventually refocused on promoting products designed to support temporary abstinence in situations where smoking was restricted. Some manufacturers accomplished this through the development of line extensions (e.g., Marlboro cigarettes, Marlboro Snus). In addition, the tobacco industry has advertised these products as alternatives to cigarettes in locations where they are otherwise prohibited and has also packaged these non-combustible and ST products in a manner that closely resembles the size and shape of cigarette packs. The potential effect of this approach, then, could be to undermine the impact of smoke-free laws on cigarette consumption by allowing for use of ST products in smoking-restricted environments. The original test markets for snus-like products (such as Camel Snus, Taboka) occurred in cities that had recently enacted smoke-free regulations.

Use of cigarette brand names to sell ST products is presumably aimed at smokers. In branding, the name carries with it a set of associations beyond the product characteristics, implying a certain level of quality and conveying a certain image.<sup>60,61</sup> Branding can communicate “a series of attachments and associations

that exist over and beyond the objective product.”<sup>61,p.745</sup> That is, if someone self-identifies as a Marlboro cigarette user, then trying a Marlboro-branded snus product may seem more consistent with that identity than using another brand, such as Skoal.

### Women

Historically, in the United States and in Scandinavia, ST has been used primarily by men. In Scandinavia, product developers have been explicitly targeting women with product innovations and attractive packaging since 2008, which may have contributed to an upward trajectory for Swedish snus use among women compared to stable levels among men.<sup>62</sup> In the United States, use of ST by women remains very low (<1%),<sup>63</sup> and studies show that men are far more interested in trying newer ST products (e.g., Taboka, Camel Snus) than women are.<sup>64,65</sup> Nonetheless, there are regional pockets with substantial use of ST by women (e.g., Alaska, Mississippi).<sup>66</sup> In some parts of South Asia<sup>67</sup> and Africa,<sup>68</sup> use of ST products is equally common among women and men, and in some cases ST use is more common than cigarette smoking among women, whereas smoking is much more common than ST use among men. The international experience demonstrates that, given the right context and product, ST products can appeal to women.

### Youth

Although no tobacco manufacturer publicly acknowledges targeting youth, capturing this market is essential for the future sustainability of the ST enterprise, just as it is for cigarettes.<sup>49,69,70</sup> Morrison and colleagues<sup>71</sup> showed that ST advertising in U.S. magazines with substantial adolescent readership had increased over time, consistent with the observed shift away from men’s sporting magazines to those with broader readership.

Adolescents can become dependent on ST just as they can on cigarettes. According to DiFranza and colleagues,<sup>72</sup> adolescent snuff users report levels of dependence similar to those of cigarette smokers with comparable histories of use; more than 50% of adolescents with less than 100 lifetime uses of either product reported at least one dependence symptom, whereas over 90% of those with more than 100 lifetime uses reported at least one symptom. Swedish youth report similar patterns, as well as particularly high dependence and withdrawal among dual users.<sup>73</sup> In the United States, UST aggressively promoted low-nicotine products to young people starting in the mid-1970s in an attempt to graduate these new users to higher nicotine products as they become more dependent on nicotine.<sup>37</sup>

A number of public health advocates have expressed concern about the appeal of novel ST products to youth. Regarding snus, attractive advertising and packaging have been a particular concern; for dissolvables, an additional issue has been their similarity to confections.<sup>28,74</sup> Studies examining youth awareness of, interest in, and use of novel ST products are few, however. Data from one survey indicate that 29% of young adult men (aged 18–25 years) living in test market cities had tried snus.<sup>65</sup> A study of 18- to 30-year-old smokers in Canada<sup>75</sup> showed that two-thirds would be willing to try ST (Marlboro Snus, du Maurier, Copenhagen, or Ariva), with du Maurier snus rated most appealing (du Maurier is a leading Canadian cigarette brand).

Of particular concern is whether novel products could initiate adolescents to nicotine use, leaving them more likely to try and eventually adopt cigarette smoking. Evidence for such “gateway” effects of ST is mixed, with Swedish studies consistently showing no significant effect.<sup>76–79</sup> Some U.S. studies<sup>80–82</sup> show increased likelihood of smoking subsequent to ST use, but others show no effect.<sup>83–85</sup> This inconsistency in patterns across countries points to the complexities of carrying evidence across national and cultural borders. As Rosendahl and colleagues note,<sup>86</sup> parental modeling of tobacco use can also be important. In Sweden, where more men use snus and more women smoke, adolescent smoking was predicted by parental smoking but not parental snus use, whereas adolescent snus use was predicted by parental snus use. The lack of “gateway” effects seen in Sweden may, in part, be a result of the greater adoption of ST use by adults, who are modeling this behavior for youth, in addition to other potential contributors such as Sweden’s ban on tobacco advertising and increased taxation of tobacco products. In the United States, smoking is far more common and remains more socially accepted; however, snus use as a precursor of smoking is a potential concern.<sup>87</sup> Another possible contributor to the observed difference in gateway use patterns is the difference in product formulation (discussed earlier)—lower nicotine levels in “starter” brands may prime users for either higher nicotine ST products or for cigarettes.

### Messaging

As target markets for ST products have evolved, so have the messages and themes used to promote them. Mejia and Ling<sup>56</sup> note that, whereas earlier messaging for traditional moist snuff was directed toward men and emphasized rugged masculinity, messaging for novel snus products centers on enjoyment of indoor activities where smoking is prohibited and is couched in imagery that emphasizes trendiness, urbanity, and sophistication for both men and women. Timberlake and colleagues<sup>88</sup> confirmed this in a content analysis of Camel Snus advertising during the years 2007 to 2010. They noted that in 2009, themes of temporary substitution were supplanted by the “Break Free” campaign, which provided more ambiguous messages tied to freedom, independence, and behavior change. Since that paper was published, Reynolds American appears to have married the two types of messaging, timing major campaigns to coincide with New Year’s Day 2012 (New Year’s is a peak time for quit attempts among smokers) and with the implementation of a May 2011 smoking ban in New York City public parks (Figure 6-2). In 2011, Reynolds American launched a 7-day switching challenge, suggesting that the company may begin to encourage full substitution of snus for cigarettes (Figure 6-3). Reynolds American and Star Scientific have employed similar themes for their dissolvable tobacco products.

Figure 6-2. Example of smokeless tobacco messaging emphasizing using smokeless tobacco when smoking is prohibited



Figure 6-3. Camel Snus ad promoting 7-Day Switch Challenge, 2011



### Packaging as Marketing

Packages can serve as key aspects of tobacco marketing, both by reinforcing brand imagery communicated through other media, and by serving as a communication vehicle at the point of sale.<sup>89</sup> Packaging has become a more central marketing tool as other communication vehicles such as billboards, magazines, and mass media have been restricted or eliminated. Cigarette manufacturers use colors (e.g., dark versus light), images (healthy, sexy, serious) and words (full-flavored, light, mild, smooth, natural, low tar) to communicate specific product features to consumers.<sup>69,90,91</sup> Industry documents reveal that manufacturers pay careful attention to the messages conveyed by packaging.<sup>60</sup> As noted by a Philip Morris executive: “Our final communication vehicle with our smoker is the pack itself. In the absence of any other marketing messages, our packaging ... is the sole communicator of our brand essence. Put another way—when you don’t have anything else—our packaging is our marketing.”<sup>92,p.ii73</sup>

Outside the United States, promotion of novel ST products in new markets (e.g., Tobaccorette and Lucky Strike snus in South Africa) has also tended to emphasize ability to use the novel product in place of cigarettes (Figure 6-2).

Packaging innovations can also play a role in the appeal of a product,<sup>60</sup> especially in high-income countries. In the United States, efforts to market ST to smokers have been accompanied by increased attention to attractive packaging. For example, Camel Snus has come in three different packaging configurations over time: originally a round tin, later an oblong tin, and finally an embossed metal tin with a design incorporating the newly required front-of-package health warning (Figure 6-4). Smokers may have been more explicitly considered in the design of Marlboro Snus, which comes in both round tins and cardboard sleeves (containing fewer sachets) that can be carried along with cigarettes (Figure 6-5). Reynolds American has also encouraged consumers to engage with the company in creating attractive packaging for both cigarettes and smokeless tobacco.<sup>93,94</sup> In low- and middle-income countries manufacturers have also introduced innovative packaging to make sale and use more convenient. In India, for example, the gutka industry promotes a packaged, ready-to-use product based on a traditional custom-made product.



Figure 6-4. Evolution of Camel Snus packaging, 2006–2011



Original tins, 2006



Redesigned tins, 2009



Redesigned tins, 2010

Source: Photos courtesy of Maansi Bansal-Travers, Roswell Park Cancer Institute.

## 6. Changing Smokeless Tobacco Products and Marketing Practices by Industry

Figure 6-5. Evolution of Marlboro Snus packaging, 2007–2011



Source: Photos courtesy of Maansi Bansal-Travers, Roswell Park Cancer Institute.

Camel's dissolvables line has been at the forefront of packaging innovation, using plastic shell cases with unique opening mechanisms on the initial release, designed to be child resistant.<sup>28</sup> The 2011 relaunched products have gone a step further, coming in distinctive matching containers and available in a variety pack. Also of note is the inclusion of Camel imagery on the package's Universal Product Code (UPC) (Figure 6-6). Embedding images in UPCs is an emerging trend in marketing,<sup>95</sup> which could increase in prominence on tobacco products as other avenues for communication are restricted or packaging of tobacco products becomes standardized.

**Figure 6-6. Universal product code designs on Camel dissolvables, 2011**



Source: Photo courtesy of Maansi Bansal-Travers, Roswell Park Cancer Institute.

### Emerging Marketing Strategies

The evolution of technology has created opportunities for innovative forms of product marketing, and the ST industry has taken advantage of the Internet and other emerging marketing practices to increase interest in its products. In the last decade, stealth marketing has become an important strategy to increase product awareness.<sup>96</sup> Stealth marketing typically involves spreading information about a product among consumers who are not aware that they are being marketed to or do not know that the person spreading the information is an agent or employee of the company or a consumer compensated for their activity. Other emerging strategies include viral marketing (a marketing technique that uses pre-existing social networks and technologies to increase product sales and brand awareness through self-replicating, much like the spread of a virus), celebrity endorsements, product placements, and “brand pushers,” all of which try to “catch people at their most vulnerable by identifying the weak spot in their defensive shields.”<sup>96,p.6</sup> Some of these practices—particularly when the relationship with the company is not disclosed, or the practice is otherwise deceptive, intrusive, and/or exploitative of consumers—can be regarded as unethical.<sup>97</sup>

Freeman and Chapman<sup>93</sup> have noted that such activities have the potential to erode the impact of advertising restrictions on tobacco products. Accumulating evidence points to an increasing Web presence by tobacco companies, as well as consumers sharing user-generated content that is pro-tobacco (which may or may not be spurred on by the tobacco industry).<sup>98-102</sup> A formal analysis of message board content posted on the website for Camel Snus showed that the board helped create a community of users who could share use experiences, and that the message board also served a marketing function by gathering information on consumer responses in the test markets.<sup>103</sup> Reynolds American maintains websites for Camel Snus and Camel dissolvables, with evolving content that includes message boards, frequently asked questions, contests, and testimonials (Figure 6-7). In the past, website users have been asked to design new signature flavors and packages for Camel cigarettes,<sup>93</sup> and a 2011 website feature allows users to custom design a snus tin.<sup>104</sup>

Figure 6-7. Example of message board from Camel dissolvables website



## Placement

### Positioning as a Quit Aid

Some have argued that ST, particularly snus-type products and dissolvables, could play a role in smoking cessation.<sup>15,105,106</sup> In Sweden, some studies have found that men have used snus to quit smoking, although there is not enough evidence to demonstrate that snus would be an effective cessation aid.<sup>78,107–110</sup> In fact, the development of pharmaceutical nicotine gum was inspired in part by Swedish submariners who used snus to alleviate nicotine withdrawal when unable to smoke.<sup>111</sup> However, in the United States, evidence for smokers' use of ST as a means to successfully quit smoking is mixed.<sup>112–114</sup> Novel ST products have not been promoted directly as cessation aids. In many countries, including the United States, doing so would require manufacturers to go through a pharmaceutical approval process and provide strong evidence of their effectiveness for cessation. However, Ariva was packaged in pharmaceutical-type blister packaging and was sometimes shelved behind pharmacy counters near nicotine replacement products.

### Increasing Availability and Access

Another marketing approach is to increase the availability of products, making access to them much easier. This is best illustrated by attempts by snus manufacturers to convince the European Union (EU) to lift its ban on the sale of moist snuff/snus (except in Sweden, which is exempt from the ban). Snuff sales are also banned in New Zealand, Australia, Turkey, Israel, Taiwan, Thailand, Singapore, Hong Kong, and the UAE,<sup>11,115</sup> but there have not been similarly strong public pushes to lift those restrictions. The EU ban, enacted in 1992, has been criticized by some for restricting access to a class of ST products that may be less toxic (that is, Swedish snus) while permitting sales of cigarettes and other forms of oral tobacco that have been associated with high toxicity and disease risks (e.g., gutka).<sup>116</sup> The European Commission (EC) directed its Scientific Committee on Emerging and Newly Identified Health Risks to review the health effects of ST products. The committee concluded that:

STP [ST products] are addictive and their use is hazardous to health. Evidence on the effectiveness of STP as a smoking cessation aid is insufficient, and relative trends in progression from STP into and from smoking differ between countries. It is thus not possible to extrapolate the patterns of tobacco use from one country where oral tobacco is available to other countries.<sup>117,p.5</sup>

In the end, the committee did not recommend either relaxing or lifting the ban. On December 19, 2012, the EC adopted its proposal to revise the Tobacco Products Directive (see chapter 10).

Another approach to increasing ST use is to introduce ST products into markets where they have been used rarely or not at all. Manufacturers such as BAT, PMI, and Swedish Match have attempted to introduce snus products in such markets as South Africa and Canada. South Africa provides an interesting example of this process. South Africans, particularly black women, traditionally used handmade ST preparations (commonly nasally), although a few manufactured products were available.<sup>118</sup> In 2004, Ayo-Yusuf and colleagues<sup>118</sup> noted that a recently introduced snus-like product (Tobaccorette) had a low percentage of free nicotine available for absorption compared to more

traditional products. In 2006, BAT introduced snus products using familiar cigarette brand names, Peter Stuyvesant and Lucky Strike, into the South African market. Although there are no published data on consumer perceptions or snus usage estimates, a national survey in 2007 showed that only 1.6% of South African ST users surveyed reported using snus (Olalekan Ayo-Yusuf, personal communication, 2013). These few events and findings point to the need for greater monitoring and more research on marketing practices in low- and middle-income countries.

### Price

#### Monetary Costs

Cost is often a significant factor in whether consumers will be interested in using a product. Depending on the jurisdiction, ST is taxed in various ways; tax authorities can apply a *specific* tax (per package or by weight) or an *ad valorem* tax (see chapter 5 for greater detail). In most cases, ST costs less per unit dose than cigarettes.

Tax is not the only driver of effective price paid by consumers; manufacturers can also influence product price. In the United States in 2008, according to the FTC, tobacco companies reported spending a record US\$324.6 million on ST price discounts (“payments made to smokeless tobacco retailers or wholesalers in order to reduce the price of smokeless tobacco to consumers”<sup>30,p.3</sup>). Although companies spent less in 2010 (US\$95 million), price discounts continued to be the single largest expenditure for ST advertising and promotion, amounting to more than one fifth (21.4%) of all ST advertising costs.<sup>30</sup> Tactics such as price discounts can soften the impact of tax increases at the retail level, blunting their effect on consumption.

Another way tobacco companies can alter the monetary cost to consumers is to offer tiers of products at different price points. This became an established practice in the cigarette market in the 1980s, primarily in response to increasing tobacco taxes,<sup>119</sup> and discount brands appear to be used most by more-dependent smokers of lower socioeconomic status.<sup>120</sup> U.S. smokeless tobacco companies also have pricing tiers: UST offers both premium (Skoal, Copenhagen) and discount (Red Seal) brands, as does American Snuff (Grizzly and Kodiak vs. Cougar). Premium brands tend to be most commonly used by adolescents, whereas discount brand users tend to be older.<sup>121–124</sup> Smokeless tobacco manufacturers have tended to introduce novel ST products at a premium price point.<sup>125</sup>

With novel ST products, a barrier to entry can be the cost of trying them, since consumers may be reluctant to spend money on a product they may not like. Thus, free trials and sampling are often important to fostering initial use of the product.<sup>126</sup> Free sampling, particularly on college campuses, was a key component of UST’s product promotion strategies in the 1980s and 1990s.<sup>37</sup> U.S. data show dramatic increases in free samples of ST in the years 2002 to 2008—a 719% increase in free samples of units weighing less than 1 oz (which would include most snus and dissolvable products).<sup>30</sup> Free sampling was important to the initial launch of Camel Snus,<sup>127</sup> and a free variety sampler pack of Camel dissolvables was available with the purchase of a Reynolds American–branded tobacco product on initial launch.<sup>104</sup> Sampling and initial trial experiences can then diffuse through a user’s social network, increasing sales (i.e., contagion).<sup>128</sup> Therefore, providing free samples can be viewed as an investment in future sales potential if a sufficient number of users adopt the product.

### Other Conceptions of Cost

Price can be conceptualized as broader than simply monetary costs and may include social perception and perceived risks and benefits of use. Understanding consumers' knowledge, attitudes, and beliefs about ST, then, is important to projecting product appeal. Several studies have found that consumers incorrectly believe nicotine causes cancer<sup>69,129,130</sup> and that ST products are as dangerous as cigarettes, if not more dangerous.<sup>130-133</sup> Surveys have attempted to tap consumer interest in novel products, usually couched in terms of their risk relative to smoking. Timberlake noted that 13% of California smokers were receptive to substituting ST for cigarettes,<sup>83</sup> whereas similar studies in Australia and New Zealand show one-half and one-third of smokers in those countries, respectively, were receptive to substitution.<sup>134,135</sup> Shiffman and colleagues<sup>136</sup> described a smoking substitute as either a nicotine-based product or a tobacco-based product, finding that U.S. smokers generally preferred the former to the latter. Up to 75% of smokers in Edmonton, Canada, were willing to try a hypothetical oral tobacco product described as 99% less hazardous than smoking.<sup>133</sup>

Social norms can represent a powerful influence on behavior.<sup>137</sup> This concept underlies the tobacco control strategy of denormalization, which has resulted in significant gains in terms of reduced smoking prevalence (particularly among adolescents), increased support for smoke- and tobacco-free environments, greater voluntary adoption of smoke-free homes, and support for regulation of the tobacco industry. However, the denormalization of cigarette smoking also leads to greater stigmatization of smokers.<sup>93,138-140</sup> This may present a marketing opportunity for novel ST products: Because use of ST, particularly spitless forms, is less visible to others, it may carry less social stigma than smoking, thus making ST increasingly more attractive to smokers. Reynolds American's 2011 Camel Snus campaigns touch indirectly on this issue in their use of tag lines like "Smoke-Free. Spit-Free. *Drama-Free*" [emphasis added].

### Summary and Conclusions

Tobacco manufacturers have begun to introduce ST products in new forms using new marketing techniques. Product innovations such as portion pouches, dissolvable tablets, unique flavorings, and varying nicotine levels may make novel products more attractive to potential consumers. Internet-based marketing appears to be increasingly important to the diffusion of novel ST products. Changing social norms and denormalization of smoking may contribute to increased attractiveness of ST products in markets where smoking prevalence is declining. In particular, ST products are being marketed toward smokers as substitutes to use in situations where they cannot smoke. On the one hand, such developments may be positive for public health if they draw substantial numbers of smokers away permanently from cigarettes. On the other hand, novel products and marketing approaches have the potential to undermine public health efforts to the extent that they attract non-users and youth to adopt use or deter smoking cessation by encouraging dual use.

Understanding consumer perceptions and responses to novel products is important to predicting their likely public health impact. Evolving regulatory frameworks under the FDA and the WHO FCTC may also help define the effects of these novel products at the population level. The FDA has authority to allow the entry of novel products, potentially allow claims of exposure or risk reduction for these products, evaluate substantial equivalence for product modifications, and set product standards.

Given these authorities, it is essential to develop the scientific evidence base to support regulatory decisionmaking. Effective regulation of product advertising and promotion must focus on consumer perceptions of messaging and take into account the emergence of Internet-based advertising and the role of product packaging. Increased and improved monitoring of marketing practices in low- and middle-income countries will benefit these countries by yielding an evidence base about regulating ST marketing in those countries. Finally, tobacco control efforts may need to evolve with the changing tobacco market to maintain progress in reducing morbidity and mortality.



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