BIG TOBACCO
(Phillip Morris Pakistan and Pakistan Tobacco Company)

TINY TARGETS

How Pakistan Tobacco Company and Philip Morris Pakistan are targeting children

TheNetwork
for Consumer Protection
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Abbreviations

BAT British American Tobacco
CSR Corporate Social Responsibility
FCTC Framework Convention on Tobacco Control
FED Federal Excise Duty
KP Khyber Pakhtunkhwa (Province)
PDHS Pakistan Demographic Health Survey
PMI Philip Morris International
PMPKL Philip Morris Pakistan Limited
POS Point of Sale
PTB Pakistan Tobacco Board
PTC Pakistan Tobacco Company Limited
SHO Statutory Regulatory Orders
TAPS Tobacco Advertising, Promotion and Sponsorship
TI Tobacco Industry
TN TheNetwork for Consumer Protection
GYTS Global Youth Tobacco Survey

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Each year more than 110,000 people die as a result of tobacco use in Pakistan. There are approximately 23.6 million (age 15-45) tobacco users in Pakistan.1 Each year more than 110,000 people die as a result of tobacco use in Pakistan. There are approximately 23.6 million (age 15-45) tobacco users in Pakistan.2 The higher prevalence of child smoking is because of unbridled Tobacco Advertising, Promotion and Sponsorship (TAPS) by Philip Morris International (PMI) and Pakistan Tobacco Company (PTC) - tobacco giants that control 72.3% of the tobacco market in Pakistan.3 It is believed that exposure of TAPS to children at shops (Point of Sale) around schools is the single biggest cause of rising smoking incidence among them.

A survey to monitor the prevalence of TAPS around schools was conducted between November 2015 and April 2016 in six cities of Pakistan including federal and provincial capitals – twin cities of capital Islamabad and Rawalpindi, Peshawar bordering Afghanistan, Quetta bordering Afghanistan and Iran, and commercial port city Karachi and cultural capital Lahore. All are among the top largest cities of Pakistan with an accumulating estimated population of around 40 million.

Monitoring reveals that PMI and PTC are targeting school children as they would serve as long term customers of their products, even though Pakistan law bans trade of cigarettes and tobacco products in and around educational institutions within a radius of 50 meters. Furthermore, the codes of conduct of major multinational tobacco companies operating in Pakistan uniformly promise not to market tobacco products to minors. The Network study finds that the transnational companies are not only unscrupulously violating their own code of ethics but also the national laws of Pakistan.

Situation Analysis

World Health Organization considers tobacco use as the world’s leading cause of preventable deaths. In last century it cost 100 million lives that is expected to increase manifold to a staggering billion people in the current century.5 Globally, daily, 80,000 to 100,000 young people fall prey to tobacco industry world over. If the tobacco industry is not stopped, 250 million children and young people alive today will die from tobacco-related diseases, which kills up to 65,000 children each year.6

Pakistan is the situation quite bleak. Smoking kills 110,000 people every year7 which is more than the 3,494 people who die every year from AIDS, 30,310 in road accidents; 4,036 due to hepatitis and 13,377 who commit suicide put together.8

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The international campaign to find linkages between pro-tobacco marketing and school children started in 1990s when a team of researchers traveled to some 200 American preschools with a game board and a list. That seminal study, in which 91 percent of the three- and six-year-olds they tested correctly paired mascot Joe Camel with his matching cigarettes, set off a cascade of antismoking legislation aimed at shielding American youth from aggressive tobacco ads10.

But new findings by John Hopkins Bloomberg School of Public Health suggest that tobacco companies have succeeded in moving their campaigns overseas regardless of international recommendations. In 2013, a research team in Brazil, China, Russia, Nigeria, Pakistan and India conducted a very similar version of the original Joe Camel study11. Among the 2,400 five- and six-year-olds they interviewed, a staggering 68 percent could identify at least one tobacco logo.

“…that children in China, India, and Pakistan were more likely to be aware of cigarette brands.” The Network’s this survey is parallel to these international studies gauging the extent of pro-smoking marketing of tobacco companies around schools. To curb this corporate deception, Pakistan needs to further strengthen its cascade of tobacco control laws that go back to pre-Partition times. The cascade include Tobacco Vend Act that binds every vendor to get a license for selling tobacco, the 1979 Cigarettes (Printing of Warning) Ordinance made printing of warning on cigarette packs mandatory.

In Pakistan the situation is quite bleak. Smoking kills 110,000 people every year7 which is more than the 3,494 people who die every year from AIDS, 30,310 in road accidents; 4,036 due to hepatitis and 13,377 who commit suicide put together.8

The law also bans tobacco trade around 50 meters radius of school/ educational institutions. Tobacco advertising in print and electronic media, on billboards, outside shops or and at any place is banned and same is the case with free gifts, samples, promotional schemes etc. But still the tobacco industry is finding loopholes in the laws to promote their children specific marketing strategies.

As Pakistan’s laws are made before signing of FCTC, there is a need to comply with Article 13 by strengthening the 2002 law and comprehensively banning TAPS (Tobacco Advertising, Promotion and Sponsorship).

Footnotes:
Methodology

A survey was conducted by the TheNetwork team to assess the pro-tobacco advertising targeting children at retail outlets within 50 meters of the vicinity of surveyed schools. To get a general picture of the situation of in Pakistan, this survey was conducted in six of Pakistan’s 10 largest cities, including four provincial capitals namely Lahore (capital of Punjab), Peshawar (Khyber Pakhtunkhwa), Karachi (Sindh), Quetta (Balochistan) and federal capital city Islamabad along with its twin city Rawalpindi.

This was an observational cross-sectional study. A similar survey has been conducted in Indonesia in early 2015 monitoring the tobacco advertisements’ presence around schools. The Indonesian survey forms were used for the similar study was adapted in reference to Pakistani laws and the local context in relation to types and means of advertising and famous brands.

After development of the survey tool, the criteria for the surveyors was established that they should be familiar with the local language and areas, minimum graduates, able to read and write in English, have their own smart mobile phones and their own means of transportation. Keeping these criteria in view, a training manual was developed explaining each part of the survey tool in the form of a video in the vernacular language explaining various terms such as point of sale with pictures. A printed copy of the training manual in English was also developed.

The survey form was pre-tested by the team members and then local surveyors were hired to pretest the tool in 40 of the POS around five schools from Islamabad and five from Rawalpindi to test the feasibility and appropriateness of its protocols. The surveyors were asked to provide a minimum of four pictures of each POS showing violations. A criterion was also developed and shared with the surveyors as to the type of violations they would be photographing. This would also further strengthen the validity of the results and decrease the chance of false reporting. Once the successful pilot testing was conducted the data collected was analyzed using SPSS software.

Changes were made in the forms reviewing the results and the surveyors’ feedback. This also helped in assessing the understandability of the training manual by the surveyors.

Once the pretesting ended, the survey was extended to rest of the cities. For this purpose first the localities were highlighted from each city from where the surveyors would be choosing the schools. The areas chosen were those densely populated, covering high middle and lower socioeconomic groups and which could act as a representative sample of the entire province. These areas have been listed in Table 1.

It was communicated in the training manual how the surveyors would be choosing schools. The distance between two schools in a locality should not be less than 500 meters. The POS/shop to be chosen were those within an average of 170 medium steps (50 meters were calculated as approximately 170 medium steps taken by any person of an average height and weight) distance from school boundary with maximum visibility of advertisements.

For this survey comprehensive protocols were developed for all selections.

After the completion of survey the surveyors submitted all the survey forms and photos. The data was then entered, cleaned and analyzed by the TN team.

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Table 1: Data Collection Locations

<table>
<thead>
<tr>
<th>Islamabad</th>
<th>Rawalpindi</th>
<th>Lahore</th>
<th>Karachi</th>
<th>Peshawar</th>
<th>Quetta</th>
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</thead>
<tbody>
<tr>
<td>F-6</td>
<td>Mohan Pura</td>
<td>Wahdat Colony</td>
<td>Federal B. Area</td>
<td>Warsak Road</td>
<td>Shahbaz town</td>
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<td>F-11</td>
<td>Sadiqabad</td>
<td>Sammabad</td>
<td>Gulshan-e-Iqbal</td>
<td>University Road</td>
<td>Topi Road</td>
</tr>
<tr>
<td>I-8</td>
<td>Faizabad</td>
<td>Krishan Nagar</td>
<td>Lyari Town</td>
<td>Hayatabad</td>
<td>Alamdarroad</td>
</tr>
<tr>
<td>I-9</td>
<td>Raja Bazaar</td>
<td>Ichra</td>
<td>Laloo Khait</td>
<td>Saddar</td>
<td>Malihabad</td>
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<td>I-10</td>
<td>GowalMandi</td>
<td>Bhatti Gate</td>
<td>Sadder Town</td>
<td>Yakatoot</td>
<td>Liaqat Bazaar</td>
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<tr>
<td>G-7</td>
<td>Satellite Town</td>
<td>Anarkali</td>
<td>Jamshed Town</td>
<td>Hash Nagri</td>
<td>Sariab Road</td>
</tr>
<tr>
<td>G-8</td>
<td>Pinwadhai</td>
<td>Model town</td>
<td>Baldia Town</td>
<td>DalaGhak Road</td>
<td>Jinnah Road</td>
</tr>
<tr>
<td>G-9</td>
<td>Saddar</td>
<td>Green Town</td>
<td>Orangi Town</td>
<td>Mekangi Road</td>
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</tr>
<tr>
<td>G-10</td>
<td>Chandni Chowk</td>
<td>Township</td>
<td>Gulberg</td>
<td>Jinnah Town</td>
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<td>G-11</td>
<td>Saidpur Road</td>
<td>Johar Town</td>
<td>Clifton</td>
<td></td>
<td></td>
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<tr>
<td>Mughal Abad</td>
<td>Cavalry Ground</td>
<td>North</td>
<td></td>
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<tr>
<td>Asghar Mall scheme</td>
<td>Gulberg</td>
<td>Nazimabad</td>
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<td>PakKoram Town</td>
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</table>
MONITORING OF TOBACCO
ADVERTISING & PROMOTION
AROUND SCHOOLS

PAKISTAN
In the face of increased stringent regulations in the developed countries to save their children from a debilitating pro-tobacco onslaught, the international tobacco companies—British American Tobacco and Phillip Morris International—are having a shockingly free hand in Pakistan to target children thanks to lax regulations in the country.

Half of the shops have a placement of cigarette packs with candies and snacks mainly visited by primary school children between the ages of 3 and 10.

The John Hopkins Bloomberg School of Public Health’s study to examine cigarette brand awareness among young children of different LMIC countries, including Pakistan, with the children of age below six shows that an alarming two-thirds can identify at least one cigarette brand logo.

The study concluded: “If children living in LMICs have a high awareness of tobacco brands, positive attitudes, and intentions to smoke, then stronger efforts need to be implemented to protect this vulnerable population.”

Because in Pakistan the tobacco companies are not allowed to market their products on television or in magazines, they use “non-traditional” advertising, such as paying retailers to place their products in the most visible parts of the store (usually either directly behind or in front of the cash register). It’s like placing candy at the front where school children are most likely to see and tempted to buy it.

This is also established by TheNetwork’s survey on how, who and where these companies carry out their pro-smoking campaigns to ensure maximum exposure of tobacco products to school children. The results are shocking:

A huge 89% of the surveyed shops are defiantly violating the local laws by not displaying a poster carrying the warning signage “Sale of cigarette to children under 18 is prohibited”.

100% of the shops around schools are openly selling cigarettes. Of these, almost half the shops (point of sale) surveyed have an outside advertisement in the form of product branding, posters, flyers, streamers, etc., while around 80% have installed promotion inside the shop in the shape of posters, flyers, streamers, etc.

In addition, the decorative placing of tobacco packs at children’s eye level including power walls behind the counter; cigarette packs inside the see-through glass counters is another worrying factor for the public health professionals.

The most disturbing factor is that around half of the shops have a placement of cigarette packs with candies and snacks mainly used by primary school children between the ages of 3 and 10.

Once these children are exposed to enticing images and open to temptation, it is not difficult for shopkeepers to sell them easy-to-buy loose single sticks.

Smokeless tobacco is another addictive intoxicant that is freely available in the shops around school which have openly put them on display. The smokeless tobacco including locally produced and smuggled from neighboring countries has been found at 79% of the shops surveyed.

100% of the shops around schools are openly selling cigarettes
80% have installed promotional materials inside the shop in the shape of posters, flyers, streamers, etc.
MONITORING OF TOBACCO ADVERTISING & PROMOTION AROUND SCHOOLS

Karachi
A total of 79 shops surrounding 20 schools in 12 localities were surveyed in Karachi. The results are alarming: 84% of the shops do not have display of mandatory signage prohibiting sale of cigarettes to minors.

The incidence of placing of cigarette packs with candies and snacks is highest in Karachi at 94% among all the surveyed cities. Virtually 100% of the shops here are selling loose cigarettes. The presence of smokeless tobacco is 73%. Inside advertisement ratio is 82% while outside is 56%. The placement of packs behind and inside the counter including powerwall is 78% but 73% have placed packs in a decorative order on the counter.

### Key Findings

- **Survey conducted around 20 Schools in Karachi**
- **79 Shops/Point of Sales (POS) monitored, approximately 4 shops within 50 meter radius of each school**
- **Top Three Most Visible Brands at these shops: Capstan, Gold Flake, Gold Leaf**
- **Areas Monitored: Federal B Area, Gulshan-e-Iqbal, Lyari Town, Laloo Kheet, Saddar Town, Jamshed Town, Baldia Town, Aurangi, Gulberg, Clifton, North Nazimabad, Korangi.**

### Most Visible Brands

<table>
<thead>
<tr>
<th>Brand</th>
<th>Visibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capstan</td>
<td>100%</td>
</tr>
<tr>
<td>Gold Leaf</td>
<td>99%</td>
</tr>
<tr>
<td>Gold Flake</td>
<td>99%</td>
</tr>
<tr>
<td>Dunhill</td>
<td>73%</td>
</tr>
<tr>
<td>B &amp; H</td>
<td>46%</td>
</tr>
<tr>
<td>Wills</td>
<td>20%</td>
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### PMI Brands

<table>
<thead>
<tr>
<th>Brand</th>
<th>Visibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marlboro</td>
<td>87%</td>
</tr>
<tr>
<td>Morven Gold</td>
<td>75%</td>
</tr>
<tr>
<td>Red &amp; White</td>
<td>64%</td>
</tr>
<tr>
<td>K2</td>
<td>58%</td>
</tr>
<tr>
<td>Diplomat</td>
<td>33%</td>
</tr>
<tr>
<td>Bonds</td>
<td>11%</td>
</tr>
</tbody>
</table>

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**Figure 3:** Cigarettes Placed with Candies/Snack Items

**Figure 4:** Overall Findings of the Karachi city
MONITORING OF TOBACCO ADVERTISING & PROMOTION AROUND SCHOOLS
A total of 80 shops surrounding 20 schools in 12 localities were surveyed in Pakistan’s second most populous city, Lahore. The focus of PMI and PTC seems to be inside shop advertising as 71% have inside advertisement and the incidence of outside advertising is lower at 27%. At least 89% are having placement of cigarette packs behind the counter shaping a powerwall. In addition, 79% have displayed the addictive commodity near the cash counter while 76% have put it on the counter. At least 82% have placed them with children’s goodies like candies and 34% are having value addition marketing of offering gifts, discounted cigarettes, etc.

The most shocking element of the findings is that none of the shops have displayed the mandatory signage of sales prohibited to minors. A terrifying 98% of the outlets are selling single sticks mainly for underage consumption. A whopping 91% of the retailers have put smokeless on sale.

**KEY FINDINGS**

- Survey conducted around 20 schools in Lahore
- 80 Shops/Point of Sales (POS) monitored, approximately 4 shops within 50 meter radius of each school
- Top Three Most Visible Brands at these shops: Gold Flakes, Marlboro, Capstan, Gold Leaf
- Areas monitored: Ichra, Bhatti Gate, Anarkali, Model Town, Wahdat Colony, Samnabad, Krishan Nagar, Green Town, Township, Johar Town, Cavalry Ground and Gulberg.

**Most Visible Brands**

<table>
<thead>
<tr>
<th>Brand</th>
<th>Visibility</th>
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<tbody>
<tr>
<td>Gold Flake</td>
<td>91%</td>
</tr>
<tr>
<td>Gold Leaf</td>
<td>89%</td>
</tr>
<tr>
<td>Capstan</td>
<td>89%</td>
</tr>
<tr>
<td>Dunhill</td>
<td>89%</td>
</tr>
<tr>
<td>B &amp; H</td>
<td>35%</td>
</tr>
<tr>
<td>Wills</td>
<td>21%</td>
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**PMI Brands**

<table>
<thead>
<tr>
<th>Brand</th>
<th>Visibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marlboro</td>
<td>89%</td>
</tr>
<tr>
<td>Morven Gold</td>
<td>77%</td>
</tr>
<tr>
<td>Red &amp; White</td>
<td>76%</td>
</tr>
<tr>
<td>K2</td>
<td>48%</td>
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<tr>
<td>Diplomat</td>
<td>22%</td>
</tr>
<tr>
<td>Bonds</td>
<td>16%</td>
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**Figure 5:** Powerwall/Cigarette placement behind cash counter

**Figure 6:** Powerwall/Cigarette placement behind cash counter

**Figure 7:** Overall Findings (Lahore City)
MONITORING OF TOBACCO ADVERTISING & PROMOTION AROUND SCHOOLS
The populous Rawalpindi city’s 76 retail point around 20 schools in 12 localities show that 84% of point of sale have inside advertisement and 51% have outside promotion.

The focus of marketing here is decorative display of packs as incidence of powerwall is 96% - the highest among all cities. The placement of tobacco on the counter is 29% while 45% put it inside the counters and racks. The trend of not displaying the “no underage sale signage” continues in Rawalpindi where 91% shops do not have this warning displayed. At least 22% have put packs with candies and a similar percentage has been extending limited time offers and free gifts to customers. Singlestick sale is recorded as 99% while smokeless tobacco sale is observed in 89% of the point of sales.

**Figure 8: Overall Findings (Rawalpindi City)**

**Figure 9: Advertisement inside POS**

- **Yes 84%**
- **No 16%**

**KEY FINDINGS**

- Survey conducted around 20 schools in Rawalpindi
- 76 Shops/Point of Sales (POS) monitored, approximately 4 shops within 50 meter radius of each school
- Top Three Most Visible Brands at these shops: Gold Leaf, Red & White, Capstan
- Areas monitored: Mohan Pura, Sadiqabad, Faizabad, Raja Bazaar, Goyal Mandi, Satellite Town, Pirwadi, Saddar, Chandni Chowk, Saidpur Road, Mughalabad & Aghar Mall Scheme.

**Most Visible Brands**

<table>
<thead>
<tr>
<th>Brand</th>
<th>Visibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gold Leaf</td>
<td>100%</td>
</tr>
<tr>
<td>Capstan</td>
<td>99%</td>
</tr>
<tr>
<td>Gold Flake</td>
<td>88%</td>
</tr>
<tr>
<td>B &amp; H</td>
<td>82%</td>
</tr>
<tr>
<td>Dunhill</td>
<td>34%</td>
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<tr>
<td>Wills</td>
<td>17%</td>
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**PMI Brands**

<table>
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<th>Brand</th>
<th>Visibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Red &amp; White</td>
<td>100%</td>
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<tr>
<td>Diplomat</td>
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<td>Morven Gold</td>
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<td>Marlboro</td>
<td>68%</td>
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<tr>
<td>K2</td>
<td>45%</td>
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<tr>
<td>Bonds</td>
<td>13%</td>
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</table>

- 96% Shops having Powerwalls/Cigarettes behind the cash counter.
- 45% Shops having cigarettes inside Glass Counters.
- 22% Shops giving “Limited time Offers” or “Free gifts on purchase of cigarettes.”
- 91% Shops do not Display “NO sale to MINORS signage”
- 99% Shops selling Single Cigarette Sticks

**RAWALPINDI**

Selling Dangerous Temptations at School Gates
MONITORING OF TOBACCO ADVERTISING & PROMOTION AROUND SCHOOLS
The total of 76 shops surrounding 20 schools in 10 different localities of Pakistani capital city Islamabad have 86% inside point of sale advertisement while outside advertisement is relatively low, i.e., 33%.

A full 95% shops have been observed as promoting sales by displaying flashy cigarette powerwalls. Cigarettes jointly placed with candies have been seen in 22% of the shops. Inside counter 17% and on the counter 13% product display has been seen. At least 8% are seen offering incentives on the sale of cigarettes. A full 79% of the shops indulged in the violation of not having displayed “the no underage sale” warning signage. Powerwalls promotion coupled with single stick sale at every shop is having maximum influence on the youth of the capital city to adopt this deadly habit. Smokeless tobacco has also been available unhindered at every shop.

**KEY FINDINGS**

- Survey conducted around 20 schools in the Federal capital, Islamabad
- 76 Shops / Point of Sale (POS) monitored, approximately 4 shops within 50 meter radius of each school
- Top Three Most Visible Brands at these shops: Gold Leaf, Red & White, Marlboro
- Areas Monitored: F-6, F-11, G-7, G-9, G-10, G-11, I-8, I-9 and I-10

**Most Visible Brands**

<table>
<thead>
<tr>
<th>Brand</th>
<th>Visibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gold Flake</td>
<td>95%</td>
</tr>
<tr>
<td>Capstan</td>
<td>93%</td>
</tr>
<tr>
<td>Dunhill</td>
<td>88%</td>
</tr>
<tr>
<td>B &amp; H</td>
<td>87%</td>
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<tr>
<td>Gold Flake</td>
<td>85%</td>
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<td>Wills</td>
<td>28%</td>
</tr>
<tr>
<td>PMI Brands</td>
<td></td>
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<tr>
<td>Red &amp; White</td>
<td>91%</td>
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<tr>
<td>Marlboro</td>
<td>91%</td>
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<tr>
<td>Diplomat</td>
<td>88%</td>
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<td>Morven Gold</td>
<td>78%</td>
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<td>Bond</td>
<td>49%</td>
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<td>K2</td>
<td>9%</td>
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**Areas Monitored:**

- F-6, F-11, G-7, G-9, G-10, G-11, I-8, I-9 and I-10

**Figure 10:** Overall findings (Islamabad City)

**Figure 11:** Powerwall/Cigarette placement behind cash counter

**Figure 12:** Advertisement inside POS

**Figure 13:** Advertisement outside POS

**Figure 14:** Presence of “No Sale to Minors” Signage

**Figure 15:** Sale of Cigarettes as “Single Sticks”
A total of 77 shops around 20 schools in seven localities were surveyed in Peshawar, the capital of Khyber Pakhtunkhwa province. It has been observed that 62% shop have inside advertisement. The percentage of powerwalls has been found as 77% and placement of cigarettes inside cash counter is 71% and on the counter 31%. At least 54% of the points of sales have been observed as having packs placed with candies while 94% shops have no clue about mandatory requirement of displaying “no underage sale” signage.

A staggering 96% shops are selling single sticks.
MONITORING OF TOBACCO ADVERTISING & PROMOTION AROUND SCHOOLS
In Quetta, capital of the geographically largest province Balochistan, 86 shops around 20 schools in 9 different localities were observed for placing pro-smoking commercial communication targeting school children. Outside point of sale advertisement is 86% and inside is 80%.

At least 65% of the outlets have powerwalls while 88% of the shops do not carry the mandatory no minor sale signage. At least 15% have limited time offers and free gifts; 21% have placed cigarette packs with candies; 96% shops selling loose sticks; 49% of the shops are seen selling smokeless tobacco; 27% have placed packs on cash counter while 22% have put them inside counters.

**KEY FINDINGS**

- Survey conducted around 20 schools in the Quetta.
- 84 Shops/Point of Sale (POS) monitored, approximately 4 shops within 50 meter radius of each school.
- Top Three Most Visible Brands at these shops: Gold Leaf, Capstan, Morven Gold.
- Areas Monitored: Shahbaz town, Toghi Road, Alamdar road, Mariabad, Liaqat Bazaar, Sariah Road, Jinnah Road, Mcconghey Road and Jinnah Town.

### Most Visible Brands

<table>
<thead>
<tr>
<th>Brand</th>
<th>Visibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gold Leaf</td>
<td>78%</td>
</tr>
<tr>
<td>Capstan</td>
<td>78%</td>
</tr>
<tr>
<td>Gold Flake</td>
<td>53%</td>
</tr>
<tr>
<td>Dunhill</td>
<td>52%</td>
</tr>
<tr>
<td>B &amp; H</td>
<td>37%</td>
</tr>
<tr>
<td>Wills</td>
<td>13%</td>
</tr>
</tbody>
</table>

### PMI Brands

<table>
<thead>
<tr>
<th>Brand</th>
<th>Visibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Morven Gold</td>
<td>62%</td>
</tr>
<tr>
<td>Marlboro</td>
<td>48%</td>
</tr>
<tr>
<td>Red &amp; White</td>
<td>24%</td>
</tr>
<tr>
<td>Diplomat</td>
<td>19%</td>
</tr>
<tr>
<td>K2</td>
<td>13%</td>
</tr>
<tr>
<td>Bond</td>
<td>10%</td>
</tr>
</tbody>
</table>

**Selling Dangerous Temptations at School Gates**

- **65%** Shops having Powerwalls/Cigarettes behind the cash counter.
- **22%** Shops having cigarettes inside Glass Counters.
- **21%** Shops place Cigarettes with candies/snacks.
- **15%** Shops giving ”Limited time Offers” or “Free gifts on purchase of cigarettes.
- **88%** Shops do not Display ”NO sale to MINORS signage”
- **98%** Shops selling Single Cigarette Sticks
The most available brands

Most advertised Brands at POS through ranking by observation

<table>
<thead>
<tr>
<th>City</th>
<th>Gold Leaf</th>
<th>Captain</th>
<th>Gold Flake</th>
<th>Dunhill</th>
<th>B &amp; H</th>
<th>Wills</th>
<th>Morven Gold</th>
<th>R &amp; W</th>
<th>Marlboro</th>
<th>Diplomat</th>
<th>K2</th>
<th>Bond</th>
</tr>
</thead>
<tbody>
<tr>
<td>Islamabad</td>
<td>72%</td>
<td>95%</td>
<td>71%</td>
<td>93%</td>
<td>65%</td>
<td>83%</td>
<td>67%</td>
<td>68%</td>
<td>68%</td>
<td>71%</td>
<td>71%</td>
<td>69%</td>
</tr>
<tr>
<td>Rawalpindi</td>
<td>76%</td>
<td>100%</td>
<td>75%</td>
<td>99%</td>
<td>67%</td>
<td>88%</td>
<td>25%</td>
<td>34%</td>
<td>62%</td>
<td>82%</td>
<td>13%</td>
<td>17%</td>
</tr>
<tr>
<td>Peshawar</td>
<td>67%</td>
<td>87%</td>
<td>46%</td>
<td>60%</td>
<td>11%</td>
<td>14%</td>
<td>16%</td>
<td>16%</td>
<td>0%</td>
<td>1%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Karachi</td>
<td>78%</td>
<td>96%</td>
<td>79%</td>
<td>100%</td>
<td>59%</td>
<td>73%</td>
<td>36%</td>
<td>46%</td>
<td>16%</td>
<td>20%</td>
<td>5%</td>
<td>9%</td>
</tr>
<tr>
<td>Lahore</td>
<td>71%</td>
<td>89%</td>
<td>71%</td>
<td>89%</td>
<td>33%</td>
<td>41%</td>
<td>30%</td>
<td>34%</td>
<td>17%</td>
<td>21%</td>
<td>17%</td>
<td>11%</td>
</tr>
<tr>
<td>Quetta</td>
<td>67%</td>
<td>78%</td>
<td>67%</td>
<td>78%</td>
<td>46%</td>
<td>53%</td>
<td>46%</td>
<td>52%</td>
<td>32%</td>
<td>37%</td>
<td>11%</td>
<td>12%</td>
</tr>
<tr>
<td>Total</td>
<td>431%</td>
<td>91%</td>
<td>409%</td>
<td>86%</td>
<td>242%</td>
<td>51%</td>
<td>326%</td>
<td>69%</td>
<td>229%</td>
<td>48%</td>
<td>16%</td>
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On the key findings of the survey has been that most of the advertisement that was observed has been done around schools is by two transnational tobacco companies – Pakistan Tobacco Company/British American Tobacco and Philipp Morris International. Both the companies jointly have 12 brands with equal share. However, PTC is the principal culprit for ensuring maximum visibility of its products to the children though PMI is not lagging behind.

The results of this survey reveal that the top leading brands in terms of most visible advertisement belonged to the tobacco giant PTC – i.e., Gold Leaf with 91% visibility and Capstan with 86% visibility, at retail outlets. In second place were Philip Morris brands Morven Gold with 76% and Red & White with 73% visibility at retail outlets.

Gold Leaf’s targeted exposure to the school children has been observed as the most found brand – i.e. 91% followed by Capstan at 86%; Morven Gold with 76% and Red & White with 73% visibility at retail outlets. A parallel breakdown of the 12 brands of Philip Morris and PTC shows that visibility of PTC according to this survey’s observations is 53% and that of PMI is 47%. The market share of both these brands – which is approximately 82% in toto with 50% of PTC and 32% of PMI, as shown by the research – we can say that our results are in accordance to these findings. The market dominance of PTC’s brands by observing its advertisements and availability can be seen easily by the survey’s results.

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In Pakistan as a whole it was seen that PTC’s brands had more visible advertisement with Gold Leaf 91% followed by Capstan 86%; Gold Flake 72%, Dunhill 51%, Benson & Hedges 48% and Wills 16%. Comparatively PMI brand Morven Gold had maximum visibility of 76% followed by Red & White 73%, Marlboro 69%, Diplomat 50%, K2 36% and Bond 17%. The visibility share in the market was 53% of PTC followed by 47% PMI.

In Karachi the visibility of PTC’s brands was dominating with 100% visibility of Capstan followed by 99% visibility of Gold Flake and Gold Leaf. Other PTC brands such as Dunhill had 73%, Benson & Hedges had 46% and Wills had 20% visibility. The PMI brand Marlboro had the maximum visibility among its brands at 87% followed by Morven Gold 75%, Red & White 64%, K2 58%, Diplomat 35% and Bond 11% visibility. A breakdown shows that PTC has a 57% visibility whereas PMI has a 43% visibility of their brands in Karachi establishing the dominance of PTC.

The leading visible brand seen in Lahore is PTC’s Gold Flake with 91% visibility followed by Gold Leaf and Capstan at 89%, Dunhill 41%, Benson & Hedges 35% and Wills with 21% visibility. The second most visible brand in Lahore belong to PMI, i.e., Marlboro with 89% visibility followed by Morven Gold 77%, Red & White 76%, K2 48%, Diplomat 22% and Bond at 16%. The market share assessed according to visibility gives PTC the lead at 53% followed by PMI at 47% of the toto.
The results of this survey establish beyond doubt that British American Tobacco and Phillip Morris International have been pursuing a patently illegal and grossly unethical marketing strategy of pro-
tobacco advertisement, marketing and promotion to the most vulnerable demographic in Pakistan: school children.

The shocking strategy of targeting of Pakistani school children as short-term customers and long-term addicts working by these two tobacco giants has been observed in and outside 470 shops surrounding 120 primary, middle and high schools in seven cities of the country having both male and female students of age ranges between 3 and 17 years. It appears that the successful penetration of tobacco marketing in Pakistan is not restricted to one social strata but to all segments of the society, including the highly impressionable school children.

The capital city was seen to have highest visibility of all brands. It was seen that PTC's brand Gold Leaf had maximum visibility of 95% followed by Capstan 93%, Dunhill 88%, Benson & Hedges 87%, Gold Flake 85% and Wills 28%. PMI brand Red & White had the maximum visibility of 93% followed by Marlboro 91%, Diplomat 88%, Morven Gold 78%, Bond 49% and K2 9%. It can be seen that the tobacco industry has focused more on the capital to ensure increased visibility of most of their brands compared to other cities. The market share of PTC according to visibility is seen to be greater, i.e., 54 % compared to PMI with a market share of 46%.

Gold Leaf of PTC was leading in Peshawar according to its visibility at 87% followed by 60% Capstan, Dunhill 18%, Gold Flake 14%, Benson & Hedges 6% and Wills was not seen in Peshawar. In PMI brands Red & White had maximum visibility of 84%, followed by Morven Gold 79%, Diplomat 47%, Marlboro 31%, Bond 5% and K2 4%. The visibility of PMI brands was seen to be more in Peshawar, i.e., 57% compared to PTC brands at 43%. Most of PMI's brands fall in the lower tier of excise tax making them a cheaper and more easily affordable choice compared to PTC brands. This could be a reason that PMI was found to be more visible in Peshawar.

In Quetta, the leading brands were of PTC, i.e., Gold Leaf and Capstan with 78% visibility followed by Gold Flake 53%, Dunhill 52%, Benson & Hedges 37% and Wills 13%. Whereas PMI's Morven Gold had maximum visibility of 62% followed by Marlboro 48%, Red & White 24%, Diplomat 19%, K2 13% and Bond 10%. The market share according to visibility was more of PTC, i.e., 64% and 36% of PMI.

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CONCLUSIONS

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aving Pakistan's vulnerable children from a dangerous life of addiction, pain, misery, costly healthcare and death must become a top priority of the Government of Pakistan, provincial governments, local administrations, federal parliamentarians, provincial legislators, political parties, educationists, child rights activists, civil society and media.

The following is a Charter of Action that must be adopted to safeguard Pakistan's vulnerable school children from temenacious business and profit motives of PMI and PTC.


2. A strict official mechanism must be developed to ensure enforcement of the 2002 law for completely banning sale of cigarettes around schools and holding PMI and PTC- and any others – accountable for its gross violations.

3. The government must ensure that shopkeepers selling cigarettes to minors must be mandatorily booked and strictly penalized under the law.

4. Local authorities must ensure that cigarettes are sold in packs of 20 and must not be sold in loose or in single sticks.

5. The Tobacco Vend Act 1958 that was legislated as part of then West Pakistan and was later adopted by provincial setups must be enforced by making license mandatory for retail sale of manufactured tobacco.

The Way Forward – Charter of Action