THE RETAIL LANDSCAPE FOR TOBACCO PRODUCTS

Kurt M. Ribisl, PhD
Allison Myers, MPH
Justin Bailey
Katie Byerly
Mieka Sanderson

CDC OSH Surveillance & Evaluation Webinar
February 27, 2013

Today’s Talk

1. Why Point-of-Sale?


3. CounterTobacco.org: Online CDC-Funded Resource Warehouse


5. Into the Future: Transforming the Retail Landscape
Disclosures (12 months)

Grant funding for Ribisl research: NC DHHS, Alcohol Law Enforcement +

Dr. Ribisl has received honoraria/consulting from: American Cancer Society; CDC Office on Smoking and Health; ChangeLab Solutions; FDA Center for Tobacco Products; University of Toronto

Dr. Ribisl, Allison Myers, and Justin Bailey do work for Counter Tools (http://countertools.org), a non-profit that distributes store mapping and store audit tools, from which they receive compensation. Dr. Ribisl, Allison Myers, Justin Bailey, and Ashley Leighton also have a pending royalty interest in a store audit and mapping system owned by the University of North Carolina at Chapel Hill. The tools and audit mapping system were not used in the studies presented here.

THE IMPORTANCE OF POINT OF SALE

Allison E. Myers, MPH
Kurt M. Ribisl, PhD

CDC OSH Surveillance & Evaluation Webinar
February 27, 2013
Industry spends $1M/hour at retail

$7,196,000,000

2010 spend on cigarette and smokeless marketing, advertising and promotion at the point of sale
Industry is buying health behavior impact

Consider three customer segments:

- NEVER-SMOKER
- SMOKER
- TRYING TO QUIT

Consider three customer segments:

- NEVER-SMOKER
Shopping, brand impressions prompt initiation

Greater visit frequency, greater brand impressions = higher odds of initiation

From never-smoker to established-smoker

Never-smoker to established-smoker

Greater advertising in stores = 8% higher odds of becoming a puffer.

Henriksen, et al., 2010, Pediatrics

From never-smoker to established-smoker

Greater ADVERTISING in stores = 8% higher odds of becoming a puffer.

Greater PROMOTIONS in stores increase odds of youth moving towards higher levels of uptake.


Retailer density linked to prevalence

AREAS WITH HIGHER RETAILER DENSITY (>5) WITHIN WALKING DISTANCE HAD HIGHER OVERALL SMOKING PREVALENCE (15.1%)

Henriksen, et al., 2008: Preventive Medicine
Consider three customer segments:

Cigarette display cues craving

Carter, et al., 2006, Nicotine & Tobacco Research

PICTURE OF EIGHT CIGARETTE PACKS INCREASED CRAVING AMONG NICOTINE-DEPRIVED AND NON-NICOTINE DEPRIVED SMOKERS
Cigarette displays prompt impulse purchase

SMOKERS NOTICE THE DISPLAY. SOME GET THE URGE TO BUY. SOME BUY, EVEN THOUGH TRYING TO QUIT

Residential proximity linked to quit success

LOWER ODDS OF SMOKING ABSTINENCE WITH CLOSER RESIDENTIAL PROXIMITY TO TOBACCO RETAILER

Wakefield, et al., 2008, Addiction

Reitzel, et al., 2010, American Journal of Public Health
Summary: $1M/hour well spent

Retail marketing:
• Prompts initiation
• Promotes daily consumption
• Discourages quitting

New York Data – What’s In Store Campaign

MAXIMIZING STATE & LOCAL POLICIES TO RESTRICT TOBACCO MARKETING AT POINT OF SALE

Katie Byerly, BSPH
Kurt M. Ribisl, PhD

CDC OSH Surveillance & Evaluation Webinar
February 27, 2013
Funded by grant number CA154281 from the National Cancer Institute at the National Institutes of Health

ADDITIONAL PARTNERS

Michael Bowling, PhD
Heather D'Angelo, MHS
Lisa Isgett, MPH
Ashley Leighton, MPH

Lisa Henriksen, PhD (Multi-PI)
Amanda Dauphinee
Trent Johnson, MPH
Nina Schleicher, PhD

Doug Luke, PhD (Multi-PI)
Sarah Moreland-Russell, PhD
Amy Sorg, MPH
Study Aims

• **AIM 1**: Audit marketing materials, products, and prices nationally

• **AIM 2**: State POS activity survey and case studies to guide POS regulation

• **AIM 3**: Retailer density and composition

• **AIM 4**: Disseminate information and recommended policy changes

---

**AIM 1**

Examine changes in the amount and type of tobacco marketing materials and pack prices in a representative sample of U.S. tobacco retailers
Aim 1 Goals

1. Conduct 3 waves of store audits (goal of \( n = 2,000 \) stores per wave)
   - Wave one completed

2. Collect tobacco marketing and price data

3. Examine levels of POS compliance with 2009 FDA Act

4. Examine racial/ethnic & socioeconomic disparities

Sampling

Stage One: County Selection
- 100 Counties (97 unique) from 40 States

Stage Two: Store Selection
- Used business lists for stores (Dun & Bradstreet and RefUSA)
- Stores eligibility was verified through phone screening
Nationally Representative Sample of Tobacco Retailers

- 97 unique counties
- 40 states

Store Audit Overview

- 5 months
- 13 data collectors (iPads)
- ~13 mins per store
- 165 Rxx stores
- 96.8% of stores complete
- 3.0% exterior only
- Only 37 hard refusals
HIGHLIGHTS FROM CURRENT DATA

Note: Data are preliminary; these numbers are NOT final

Complete audits (both interior and exterior) for 2201 stores
Partial audits (exterior only) for additional 69 stores

Cigarette Price Promotions

73.6% of stores have at least one price promotion (either interior or exterior)

<table>
<thead>
<tr>
<th></th>
<th>Marlboro</th>
<th>Newport</th>
<th>Camel</th>
</tr>
</thead>
<tbody>
<tr>
<td>INTERIOR (%) of stores</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special price</td>
<td>23.6%</td>
<td>22.5%</td>
<td>39.9%</td>
</tr>
<tr>
<td>Multi-pack</td>
<td>13.0%</td>
<td>10.0%</td>
<td>8.4%</td>
</tr>
<tr>
<td>EXTERIOR (%) of stores</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special price</td>
<td>4.1%</td>
<td>13.4%</td>
<td>4.4%</td>
</tr>
<tr>
<td>Multi-pack</td>
<td>5.3%</td>
<td>4.4%</td>
<td>3.8%</td>
</tr>
</tbody>
</table>
Branded Marketing Materials

<table>
<thead>
<tr>
<th></th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total exterior</td>
<td>3.3</td>
</tr>
<tr>
<td>Total interior</td>
<td>26.3</td>
</tr>
<tr>
<td>Total (both)</td>
<td>28.8</td>
</tr>
</tbody>
</table>

Data Highlights

- 34.6% of stores in our sample sell e-cigarettes
- 82.5% of stores in our sample sell flavored regular or little cigars
- 48.3% of stores in our sample sell snus
Violations

8.8% of stores have at least one violation

Top 3 violations:

- 2.6% of stores have self-service of smokeless tobacco
- 2.4% of stores sell cigarettes with labeling indicating modified risk (e.g. "light", "low tar", "mild")
  - Illegal to manufacture as of June 2010
- 1.9% of stores sell flavored cigarettes (other than menthol)

Price Surveillance

<table>
<thead>
<tr>
<th>Advertised Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marlboro Red</td>
</tr>
<tr>
<td>Mean = $6.24</td>
</tr>
<tr>
<td>(SD = 1.47)</td>
</tr>
</tbody>
</table>

*Single cigarette packs
Price & Tax Stamp Surveillance

Marlboro: Stores with odd ID numbers

Newport: Stores with even ID numbers

Advertised Price vs. Purchase Price analysis coming soon!

Dissemination Products

<table>
<thead>
<tr>
<th>Product</th>
<th>Audience/Partner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Point of Sale Report to the Nation</td>
<td>Tobacco control programs&lt;br&gt;National partners&lt;br&gt;Policymakers&lt;br&gt;Scientists&lt;br&gt;Advocacy partners</td>
</tr>
<tr>
<td>Case study reports</td>
<td>Tobacco control programs&lt;br&gt;Policymakers&lt;br&gt;National partners&lt;br&gt;Scientists&lt;br&gt;Advocacy partners</td>
</tr>
<tr>
<td>Policy briefs</td>
<td>Tobacco control programs&lt;br&gt;Policymakers</td>
</tr>
<tr>
<td>National retail outlet protocol</td>
<td>Scientists&lt;br&gt;National partners</td>
</tr>
<tr>
<td>National retailer data set</td>
<td>Scientists&lt;br&gt;National partners</td>
</tr>
</tbody>
</table>
A team is working on a standardized point-of-sale audit that any state could use

Drs. Lisa Henriksen (Chair), Kurt Ribisl (Co-Chair), Todd Rogers (Co-Chair)

COUNTERTOBACCO.ORG: A RESOURCE WAREHOUSE

Mieka Sanderson
Allison E. Myers, MPH
Kurt M. Ribisl, PhD

CDC OSH Surveillance & Evaluation Webinar
February 27, 2013
Resources: From A to Z

WAR IN THE STORE

POS Spending = $6.9 Billion in 2010

IMAGE GALLERY

text, exterior posters, youth appeal, advertising, shelving and display, interior
Resources: From A to Z

WAR IN THE STORE

POS Spending = $6.9 Billion in 2010

FEATURE STORIES

- Stores Near Schools
- Industry Targeting of Low Income Neighborhoods
- Non-Cigarette Tobacco Products (OTP)
- Public Opinion Surveys

IMAGE GALLERY

<table>
<thead>
<tr>
<th><img src="image1.png" alt="Image 1" /></th>
<th><img src="image2.png" alt="Image 2" /></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><img src="image3.png" alt="Image 3" /></th>
<th><img src="image4.png" alt="Image 4" /></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><img src="image5.png" alt="Image 5" /></th>
<th><img src="image6.png" alt="Image 6" /></th>
</tr>
</thead>
</table>

POLICY SOLUTIONS

- Licensing, Zoning and Retailer Density
- POS Marketing, Advertising and Promotions
- POS Health Warnings
- Raising Tobacco Prices Through Non-Tax Approaches
- Restricting Product Placement
- FDA Tobacco Control Act and POS
Site usage continues to grow

Highlights
- Launched Aug 2011
- > 39,000 page views
- > 10,800 visits
- > 6,000 unique visitors
- 4.08 minutes per visit

Cumulative Visits to CounterTobacco.org:
August 1, 2011 to December 31, 2012

Source: Counter Tobacco Google Analytics 2013

> 500 Subscribers

E-Newsletter

Newsletter highlights new countertobacco.org content

Facebook.com/countertobacco

Social media packages the latest in tobacco industry POS activity into easy-to-read tidbits

Twitter.com/countertobacco
Photo Contest

Categories:
- #Map or #Infographic
- Stores near #Schools
- #Youth appeal
- #Funniest/most ironic
- #Cheapest flavored little cigar
- Near #Candy

Goals
1. Increase user engagement
2. Expand image gallery contents

Winner: Most Ironic/Funniest

Tampa, FL 2012
Winner: Best Infographic/Map

Winner: Youth Appeal

Herkimer, NY 2012
Visits increased in September and October due to photo contest; high traffic was sustained in November.

Source: CT Google Analytics Jan 1, 2012 to Nov 30, 2012

2013: New Site Content

Content includes:
- Feature stories
- Printable fact sheets
- Research summaries
- Templated media campaigns

Source: http://www.nhregister.com/articles/2012/08/10/news/doc5025c2bd6b17862399106.txt
2013: CDC POS Webinar Archive

Password protected portal on Counter Tobacco website searchable by keyword and date

2013: Youth Engagement Activities

WALKING TOBACCO AUDIT

Can you guess how many tobacco retailers are near your community on your way to school?

DONT KNOW? HERE’S YOUR CHANCE TO FIND OUT!

POINT-OF-SALE SCAVENGER HUNT

Do you know what tobacco products are sold in your community? Have you seen where it’s located?

HELP OPEN EYES TO ISSUES IN YOUR COMMUNITY WITH THIS ACTIVITY

TOBACCO RETAILER NATION

Communities are saturated with fast food restaurants, but what about tobacco retailers?

FIND OUT HOW YOUR COMMUNITY STACKS UP WITH THIS ACTIVITY

Pre-packaged engagement activities for youth groups
Youth Engagement Activity Components

• Activity timeline
• How-to instructions
• Data collection forms
• Sample final product

Walking Tobacco Audit Pilot Test

• 1 youth group leader, 4 high school students
• 3 retailers in a modified walk-zone of an elementary school
• 48 exterior tobacco advertisements
COUNTER TOOLS: A Social Venture Offering Data Collection & Mapping For Retail Tobacco Control

Justin Bailey
Lisa Isgett, MPH
Allison Myers, MPH
Kurt Ribisl, PhD

CDC OSH Surveillance & Evaluation Webinar
February 27, 2013

Offering start up support for retail work

1. Price/Excise Taxes
2. Clean Indoor Air
3. Quit Services
4. Media Campaigns
5. Retail Environment
Retail Policy Change Process

Measure and map retail activity & public opinion

Generate support for tested policies

Generate support for tested policies

Awareness

Action

ATTITUDE

Generate support for tested policies

Store Audit Center & Store Mapper

COMPLETE ASSESSMENT TOOL: BUILD A TEAM, ADD STORES, SELECT ITEMS, DEPLOY A CAMPAIGN, GET A REPORT

FIND AND DISPLAY RETAILER DATA: LOCATION AND DENSITY, POLICY COMPLIANCE, TEST POLICY BUFFER ZONES

Original development funding provided by:
Store Audit Center:
Audit.CounterTobacco.Org

Welcome!
Tobacco companies spent more of their marketing and promotional dollars in the retail environment than anywhere else. Big tobacco is required to report their marketing spend to the Federal Trade Commission, and, according to the 2011 Federal Trade Commission Opioid Reform, the six largest tobacco companies spent $8.2 billion at the point of sale in 2010. That is $1,000,000 an hour on price discounts and branded advertisements that promote tobacco usage and make it harder to quit.

One important step in changing the tobacco industry is the point of sales. To conduct retail audit in your community. First, use store audit to document the current situation. How does it look like in your store? Count the number of advertisements, second where products are available and where they are located in the store. Check for compliance with tobacco regulations. Next, use your data as ammunition towards changing policies in your community or your state.

Click here to register and start creating your own customized audit.

A COMPLETE RETAIL ASSESSMENT TOOL:
BUILD A TEAM, ADD STORES, SELECT ITEMS, DEPLOY A CAMPAIGN, GET A REPORT

Original development funding provided by:

Store Audit Center
MY TEAM

MY TEAM

TEAM INFORMATION
Name: 
City: 
State: 

TEAM MEMBERS
Name: 
Email: 
Phone: 

ADD A MEMBER
Name: 
Email: 
Phone: 
Status: 

S END MY TEAM
To send a message to the active members of your team, please provide a subject and message in the space provided. Your address will also receive a copy.

Subject: 
Message: 

Send Message
Store Audit Center
CAMPAIGNS

ADD A CAMPAIGN

Name:
Start Date:

Audit Form:

Options:

States:
Stores:
Auditors:

Auditors may add stores:
- Yes
- No

Auditors see all stores on map:
- Yes
- No

Instruct:

Appears at the top of the audit form:

Store Audit Center
GET A REPORT

MINNESOTA AUDIT MODULE

FLAVORED little cigars or cigarettes sold?

50.1%

Non-FLAVORED little cigars or cigarettes sold?

59.9%
Store Mapper
Tobacco Retailers by Density

Store Mapper
Youth Access Compliance by Location
Store Mapper
Youth Access Compliance with Callout

Select Your Area
Search for a city or address:  
Find your school district:  
Select County:  

Legend
No underage sales  
One underage sale  
Two or more underage sales  

Map Features
Current map theme  
Public schools  
Private schools  
Tobacco retailers  
Youth access  
Policy tester  
Get a Report

Store Mapper
Youth Access Compliance by County

Select Your Area
Search for a city or address:  
Find your school district:  
Select County:  

Legend
Percentage of ALZ underage purchase allowed to a minor:  
0% or less  
5.1% - 9.9%  
10% - 14.9%  
15% - 19.9%  
20% or greater  

Areas with a crosswalk fill have fewer than 25 ALZ operations, and statistics may not be entirely meaningful.

Map Features
Current map theme  
Tobacco retailers  
Youth access  
Policy tester  
Get a Report
Store Mapper
Get a Report

Report types
- Tobacco Retailers
- Youth Access
- Policy Tester
- FDA Checks

Report areas
- County
- School District
- MN House District
- MN Senate District
- US Cong. District
- Current Map View

Report formats
- PDF
- XLSX
- CSV

Policy Tester Report
Minneapolis

<table>
<thead>
<tr>
<th></th>
<th>300 ft</th>
<th>500 ft</th>
<th>1000 ft</th>
<th>1/4 mile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schools*</td>
<td>9 (1%)</td>
<td>16 (2%)</td>
<td>13 (4%)</td>
<td>145 (19%)</td>
</tr>
<tr>
<td>Local parks</td>
<td>1 (0%)</td>
<td>8 (1%)</td>
<td>9 (2%)</td>
<td>110 (13%)</td>
</tr>
<tr>
<td>Schools* and/or parks</td>
<td>10 (1%)</td>
<td>23 (3%)</td>
<td>180 (14%)</td>
<td></td>
</tr>
</tbody>
</table>

* Note: School locations add an additional 250 ft to the buffer distance to adjust for school property boundaries.
What We Offer

Customer #1: Minnesota
- Unlimited access to Store Audit Center
- Customized Minnesota Store Mapper
- In-depth in-person training
- Monthly meetings with our team
- Store audit form & protocol guidance
- In-person data review & discussion
- On-call technical assistance and trouble shooting
- Streamlined process and resource savings

Minnesota: Progress to Date

- Customized Store Mapper tool
- Retailer density
- Stores near schools
- FDA Compliance

- Conducted > 300 store audits
- Data on price promotion, product availability, youth placement, marketing
- Considering policy options with PHLC
POS Training Institute

Getting Started at Point of Sale: a Training Institute
Chapel Hill, North Carolina
May 30 – 31, 2013

- Why Retail? Making the case for POS tobacco control
- Getting Started: Engaging communities to build an evidence base
- Building a Store Assessment Form: What are you measuring?
- How to do Store and Neighborhood Audits (store visits and pilot testing)
- Interactive Store Mapping for POS Tobacco Control

Includes 2 months access to Store Audit Center software, weekly technical assistance calls, training materials, 2 nights single occupancy hotel, all meals, some ground transportation. $1850/person fee.

Register at WWW.COUNTERTOOLS.ORG

TRANSFORMING THE RETAIL LANDSCAPE

Kurt M. Ribisl, PhD

CDC OSH Surveillance & Evaluation Webinar
February 27, 2013
Chapter One

TODAY’S RETAIL OUTLET
Can we go from restricting tobacco retailers through zoning to encouraging their presence?

Chapter Three

TRANSITION TO A HEALTHY STORE
Healthy Stores Rationale:
Declining U.S. Cigarette Consumption
Production of All Tobacco in the United States

National Statistics for Tobacco. Statistics by Subject, National Agricultural Statistics Service, USDA.

Production of All Tobacco and Number of All Farms Growing Tobacco in the United States

National Statistics for Tobacco. Statistics by Subject, National Agricultural Statistics Service, USDA.

Successful tobacco transitions

Vollmer Farm

Cigarette Vending

The Art-o-Mat
Next transition opportunity?

Meet Jim

Owner of a popular tobacco retail outlet in Chapel Hill, NC
Q & A DISCUSSION

info@countertobacco.org
www.countertobacco.org
www.countertools.org
THE RETAIL LANDSCAPE FOR TOBACCO PRODUCTS

Kurt M. Ribisl, PhD
Allison Myers, MPH
Justin Bailey
Katie Byerly
Mieka Sanderson

CDC OSH Surveillance & Evaluation Webinar
February 27, 2013