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Institute for Global Tobacco Control

Technical Report on Tobacco Marketing at the Point-of-Sale in Five Slovenian Regions

Product Display, Advertising, and Promotion around Schools



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Background and Introduction

Tobacco use is the leading cause of preventable death and disease across the globe.¹ Although global estimates of tobacco marketing expenditures are not available, US cigarette manufacturers alone are estimated to have spent over 26 billion US dollars between 2011 and 2013 on advertising and promotion.² Tobacco companies use deceptive and predatory marketing practices to increase consumption of their products, and to make tobacco use appear glamorous or socially acceptable while dismissing the products' adverse health effects.³ Article 13 of the World Health Organization's (WHO) Framework Convention on Tobacco Control (FCTC) calls for a comprehensive ban on all forms of tobacco advertising, promotion, and sponsorship (TAPS), including the retail display of tobacco products.⁴ Evidence shows that the tobacco industry responds to partial TAPS bans that regulate only certain types of TAPS strategies (such as television or radio) by re-directing their resources to market their brands on unregulated channels such as the point-of-sale (POS).⁵ Numerous longitudinal studies have demonstrated that exposure to tobacco product advertising and promotion increases the likelihood that youth will start to smoke.⁶ The display of tobacco products at the POS has the same effect and influence on behavior as traditional media advertising.⁷ Marketing in retail environments specifically has been shown to increase the likelihood of smoking initiation among youth.⁸ One study found that stores where adolescents frequently shop may contain nearly three times as many marketing materials and shelf space for popular tobacco brands.⁹

Slovenia became a Party to the WHO Framework Convention on Tobacco Control on June 13, 2005.¹⁰ Among Slovenia's just over 2 million residents,¹¹ an estimated 26.8% of adult men, and 21.4% of adult women use tobacco daily, with 13.3% of boys, and 20.3% of girls reported as current smokers.¹² Of students who currently use tobacco products, approximately half report buying cigarettes in a store.¹³

Slovenia's current tobacco control laws do not explicitly ban the display or advertising of tobacco products at the point-of-sale.¹⁴ Although most forms of tobacco advertising are banned, there are exceptions, including the use of trademarks in certain circumstances; allowances for those involved in the production, distribution, and sale of tobacco products; and on external and internal signs of shops selling tobacco products in the total area of up to 7 meters squared.

The law also prohibits the manufacturing and sale of tobacco products that do not display the prescribed health warnings printed on the unit and outer packaging. A text-only warning must cover at least 30% of the front of the packaging. A combined picture-and-text warning must cover at least 40% of the back of the packaging.

Additionally, the sale of tobacco products is prohibited to those under the age of 18 (this must be posted in stores in a visible place), from vending machines, and outside of original packaging, including single cigarette sticks. Sponsorship by the tobacco industry of events, activities, and individuals is also prohibited.

Currently, these aspects of Slovenia's laws do not align with FCTC Article 13 and the corresponding guidelines with respect to point-of-sale advertising, promotion, and product display.

Methods

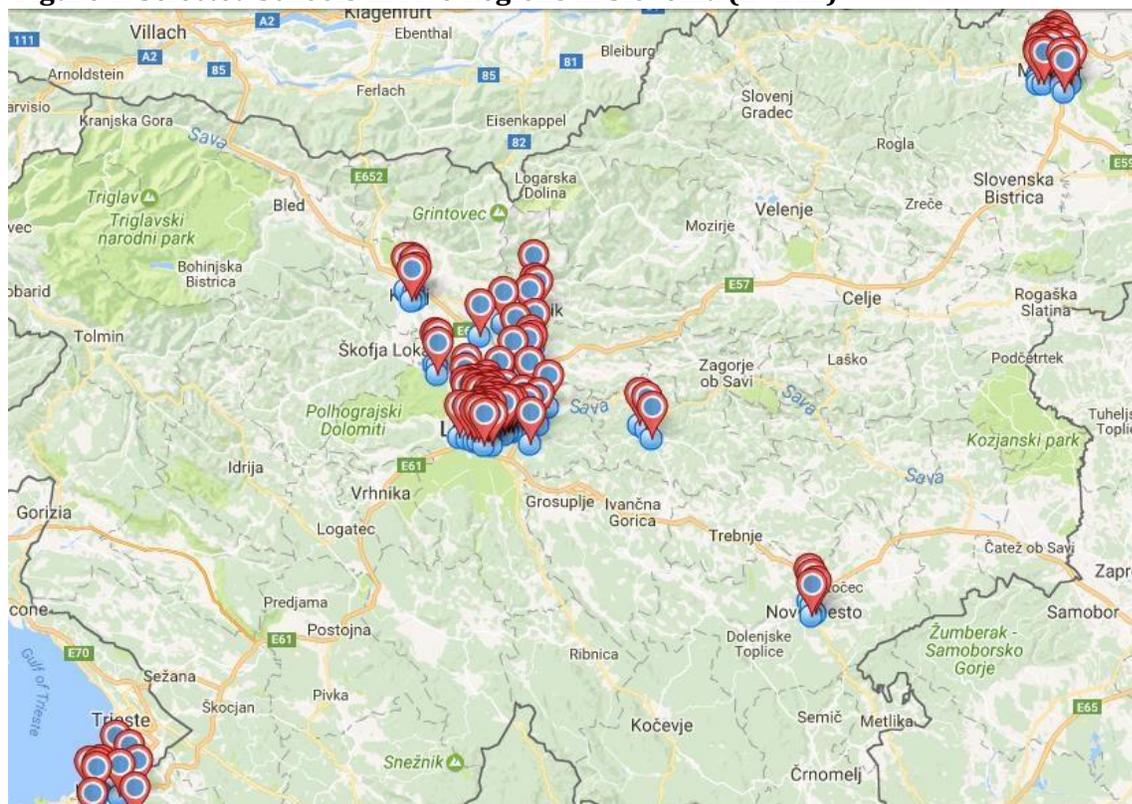
The following report describes a study about tobacco marketing at the point-of-sale in the Slovenian regions of Osrednjeslovenska, Podravska, Obalno-kraška, Jugovzhodna, and Gorenjska. The work was led by the Institute for Global Tobacco Control (IGTC) at the Johns Hopkins Bloomberg School of Public Health (JHSPH). IGTC partnered with No Excuse, a youth and public interest organization based in Slovenia, and the Campaign for Tobacco-Free Kids (CTFK), an international tobacco control advocacy organization. No Excuse provided guidance and context about the sampling framework, and recruited local data collectors to record observations. IGTC designed the survey instrument and data collection protocol, and CTFK trained the data collectors to gather data and submit daily reports for review in real-time. The CTFK study team was in Ljubljana for training and data collection period to troubleshoot any logistical or technical issues. Data cleaning, validation, and analysis were carried out by IGTC.

Sampling Approach

This study surveyed tobacco retailers in the regions of Osrednjeslovenska, Podravska, Obalnokraška, Jugovzhodna, and Gorenjska, Slovenia. No Excuse identified and selected primary and secondary schools within each city which were then plotted on a map. Schools and neighborhoods were selected based on local knowledge surrounding (1) retail density, (2) school density; (3) safety, and (4) ease of accessibility for data collectors traversing the city via public transportation.

One hundred and twelve schools were selected and assigned unique identification codes (73 in Osrednjeslovenska, 20 in Podravska, 10 in Obalno-kraška, 4 in Jugovzhodna, and 5 in Gorenjska). An online mapping and distance software was used to define the sampling area radius of 250meters surrounding each school, ensuring that none of the sampling areas overlapped. The study surveyed a convenience sample of supermarkets, convenience stores, small grocers, kiosks/newsstands/trafikas, cafes/bars, and gas stations.

Figure 1. Selected Schools in Five Regions in Slovenia (n=112)



Survey Instrument

The survey instrument was designed to address key components of Slovenia's tobacco control law that allows or regulates different types of tobacco product placement, promotion, health warnings, and sales restrictions, as well as known trends in POS marketing that may target youth (see Figure 3). The survey also asked whether stores were located within eyesight of the school and provided fields for data collectors to enter the sampling area code, retailer address, name brand of tobacco products displayed or advertised, and other notes or comments about the retailer.

Figure 2. Survey Instrument Content

Product Display	Advertisements	Promotions
In the cashier zone	Print signage	Price discounts
Behind the cashier zone	3-dimensional signage	Free tobacco products
Hanging above or from the ceiling	Digital signage	Free non-tobacco gifts (with or without purchase)
On a branded stand or cabinet	Using movement	Offer for contests of competitions
On a power wall of tobacco products	Using lights	Mention of loyalty schemes or social media channels
At the eye-level of children (1 meter or less from the floor)	Mention of flavors (not menthol)	Imitation tobacco products (toys or candy)
With toys	Mention of menthol	Mention of sponsored events or activities
With sweets, snacks, or soda	Use of English words	Presence of brand representative in the store
Packs with flavors (not menthol)	Health Warnings and Age Restrictions	
Packs with menthol	With warning labels visible on a all displayed packs	
Using movement	Required health warnings visible on all advertisements	
Using lights	Required sign posted that tobacco will not be sold to minors under age 18	

Data Collection Protocol

Observations and photos were collected from 315 retailers during normal business hours from 13 December through 16 December, 2016. Each data collector received a packet of sampling area maps including the unique school identification code and space to record the addresses of retailers in the area (Appendix A). Street names and radii boundaries were clearly visible on all sampling area maps. Data collectors identified retailers within the sampling area by using the maps to follow a systematic walking pattern, observing all streets within the 250-meters and were instructed to use the nearest intersections and nearby landmarks to better identify the limit of the sampling radius. Retailers that sold tobacco products prompted a request for detailed observations on tobacco product marketing, while only the address, school identification code, visibility from the school, date of observation, and geolocation were recorded for locations that did not sell tobacco products. Data collectors wrote the address of each tobacco retailer they observed on the corresponding sampling area map. Observational data and photos of tobacco product displays or ads were recorded and uploaded to a cloud-based database in real-time within Magpi, a mobile data collection application installed on smartphones. The mobile app automatically captured the date, geographic coordinates, and data collector name for each record uploaded to the dataset. The order of questions and format of response options were designed to facilitate rapid and discrete observation by data collectors. Data collectors also carried paper copies of the survey to use as an alternative to the mobile app in the event of any technical issue. At the end of each day, data

collectors reported the address and sampling area code of each retailer they observed by entering information into a spreadsheet hosted on Google Drive. The CTFK study team reviewed these reports daily in order to check the uploaded dataset and ensure that the mobile software application was functioning properly.

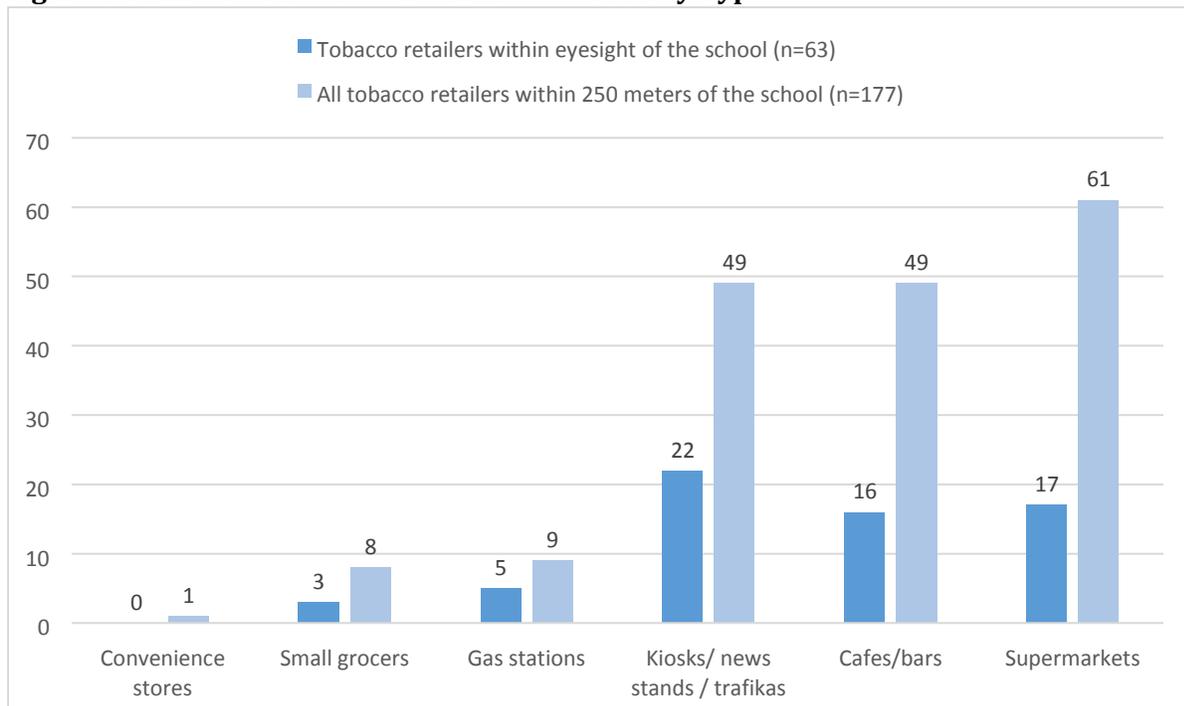
Training

Eight data collectors attended a one-day training on the study protocol on 12 December, 2016 – immediately before the data collection period. The CTFK study team explained in detail the purpose of the study, the current tobacco control law, the survey content, key terms and definitions, the Magi software application, and data collection procedures. Data collectors were instructed to behave as customers in order to discretely observe the retail environment and capture photos. In order to estimate the placement of products at the eye level of children, each data collector used a measuring tape to identify a 1-meter reference point on their body. The data collection team was trained to recognize product displays, advertising, promotions, and required health warnings or signs communicating age restrictions. During the training, data collectors participated in a field test of the study protocol to practice using the survey, mobile app, and data collection procedures in nearby retailers.

Results

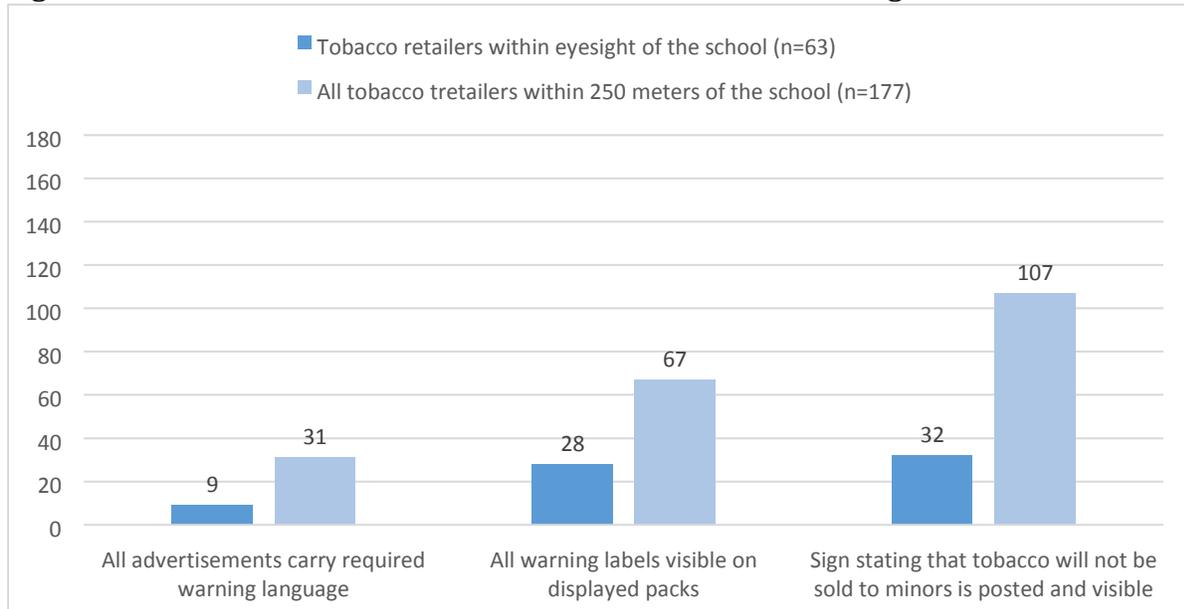
Data collectors observed 90 of the 112 school sampling areas selected (61 in Osrednjeslovenska, 16 in Podravska, 6 in Obalno-kraška, 3 in Jugovzhodna, and 4 in Gorenjska) and identified 315 retailers – 177 of which sold tobacco products (110 in Osrednjeslovenska, 43 in Podravska, 9 in Obalnokraška, 7 in Jugovzhodna, and 8 in Gorenjska). Sixty-three (35.6%) of these tobacco retailers were located within eyesight of a school (49 in Osrednjeslovenska, 9 in Podravska, 3 in Obalnokraška, 0 in Jugovzhodna, and 2 in Gorenjska). Retailers that sold tobacco products were identified within 84 of the 90 school sampling areas observed. Data collectors identified 61 supermarkets, 49 cafes or bars, 49 kiosks/newsstands/trafikas, 9 gas stations, 9 small grocers, and 1 convenience store selling tobacco products (Figure 4). No tobacco shops were observed.

Figure 3. Number of Tobacco Retailers Observed by Type



Among the 177 tobacco retailers observed, only 60.4% (n=107) posted a visible sign stating that tobacco products will not be sold to minors under the age of 18. Health warnings were visible on all displayed cigarette packs in only 37.8% (n=67) of retailers, and required health warnings were present on all advertisements in only 17.5% (n=31) of all retailers.

Figure 4. Number of Tobacco Retailers with Visible Health Warning Labels on Packs



Tobacco products were observed on display in 90.0% (n=160) of all tobacco retailers within the sampling area, and in 92.1% (n=58) of tobacco retailers within eyesight of the school. Tobacco products were most often placed near sweets, snacks, or soda (60.4%, n=107), behind the cashier zone (52.0%, n=92), and in the cashier zone (44.1%, n=78). Among those retailers located within eyesight of the school, 65.1% (n=41) placed tobacco products near sweets, snacks, or soda. Sometimes, tobacco products were placed at the eye-level of children (10.7%, n=19), or with toys (4.5%, n=8).

Figure 5. Number of Tobacco Retailers with Tobacco Product Displays at the Point-of-Sale

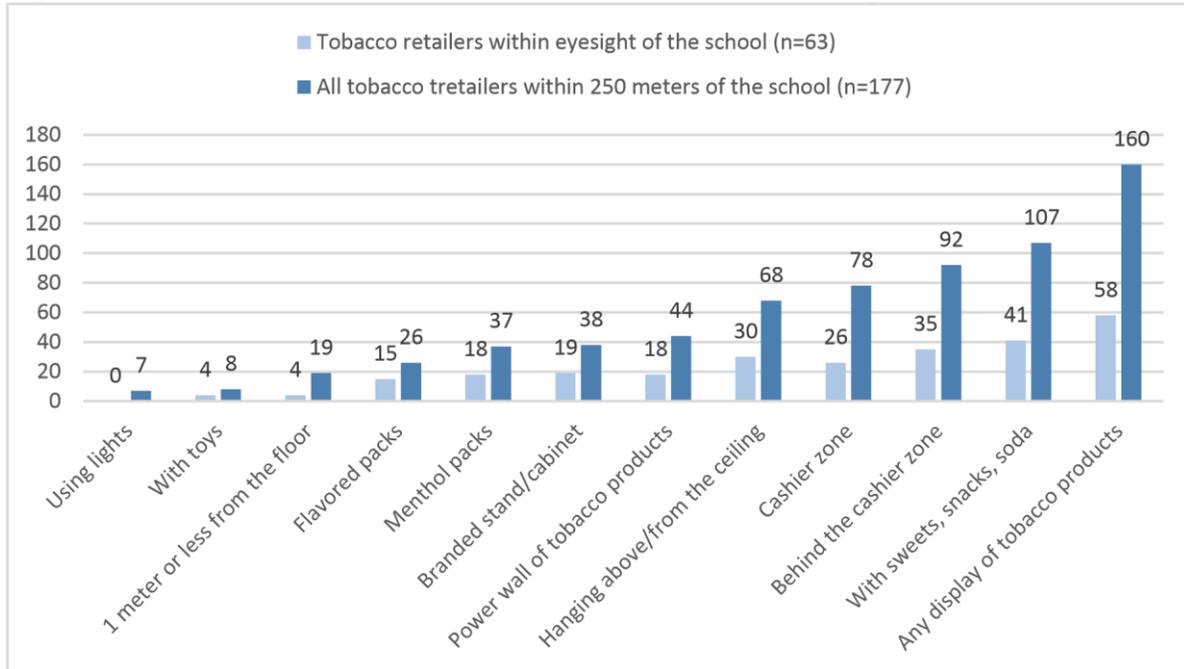


Figure 6. Tobacco Products Displayed on a Power Wall at the Point-of-Sale



Among all tobacco retailers observed, 42.0% (n=74) advertised tobacco products at the POS, most frequently in the form of print signage (36.1%, n=64)

Figure 7. Number of Tobacco Retailers with Advertising Signage at the Point-of-Sale

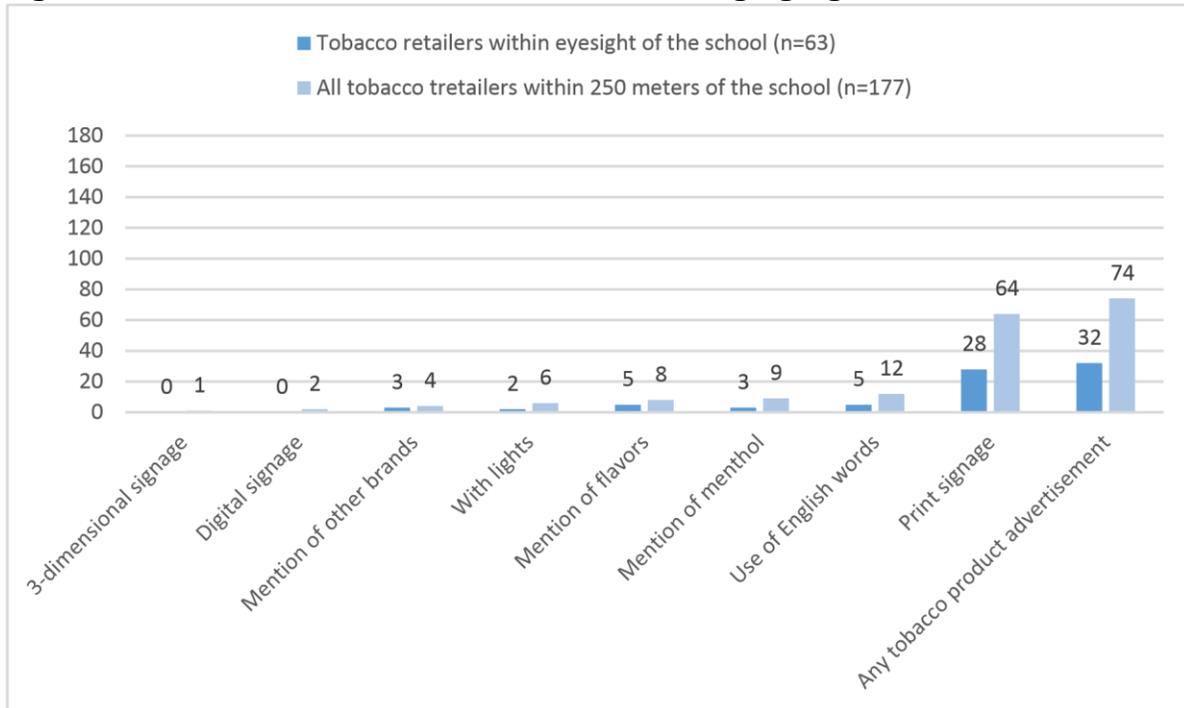


Figure 8. Printed Advertisements Placed on Tobacco Product Displays at the Point-of-Sale



Brand stretching (use of tobacco brand names on non-tobacco products) was the only type of promotion observed at the POS. Brand stretching was present in 43.0% (n=76) of tobacco retailers, most frequently on smoking accessories (31.0%, n=55) such as lighters or ashtrays.

Figure 9. Number of Tobacco Retailers with Tobacco Brand Stretching

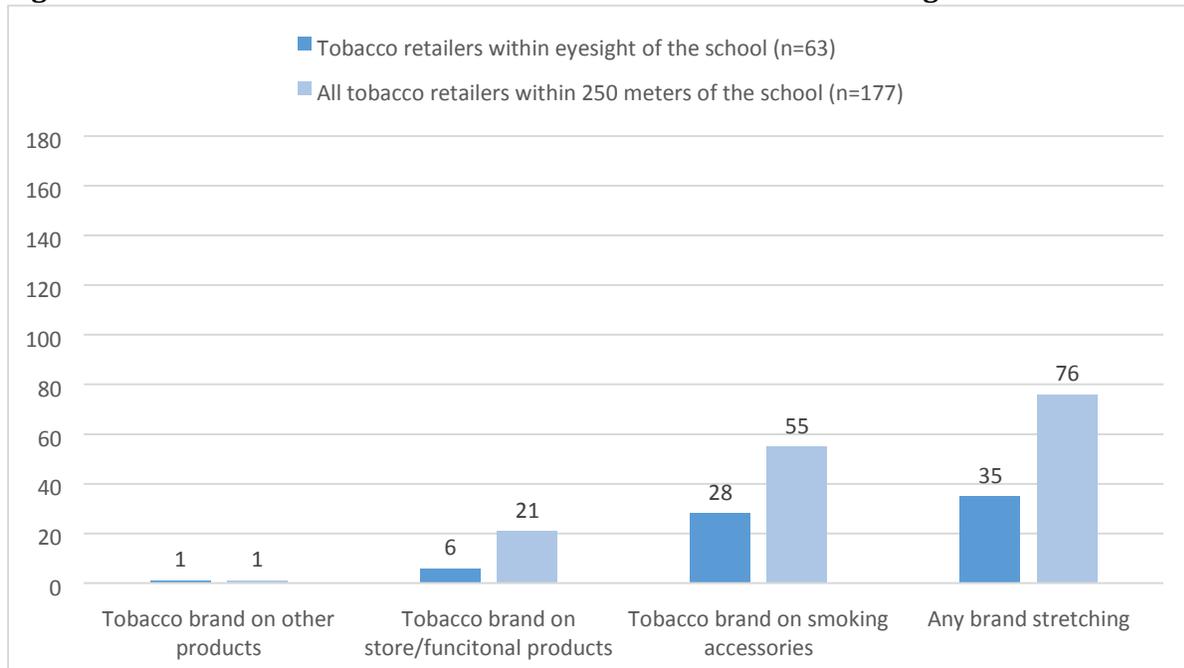


Figure 10. Tobacco Brand Names on Non-Tobacco Products at the Point-of-Sale



Among all tobacco retailers, marketing tactics that were visible from outside the POS were observed in 50.0% of retailers (n=88). Specifically, tobacco product displays were visible from outside the POS in 36.1% of retailers (n=64) and tobacco product advertisements were visible from outside the POS in 23.7% of retailers (n=42). No tobacco promotions were observed from outside the POS.

Figure 11. Number of Tobacco Retailers with Tobacco Advertising, Promotions, or Product Displays Visible from Outdoors

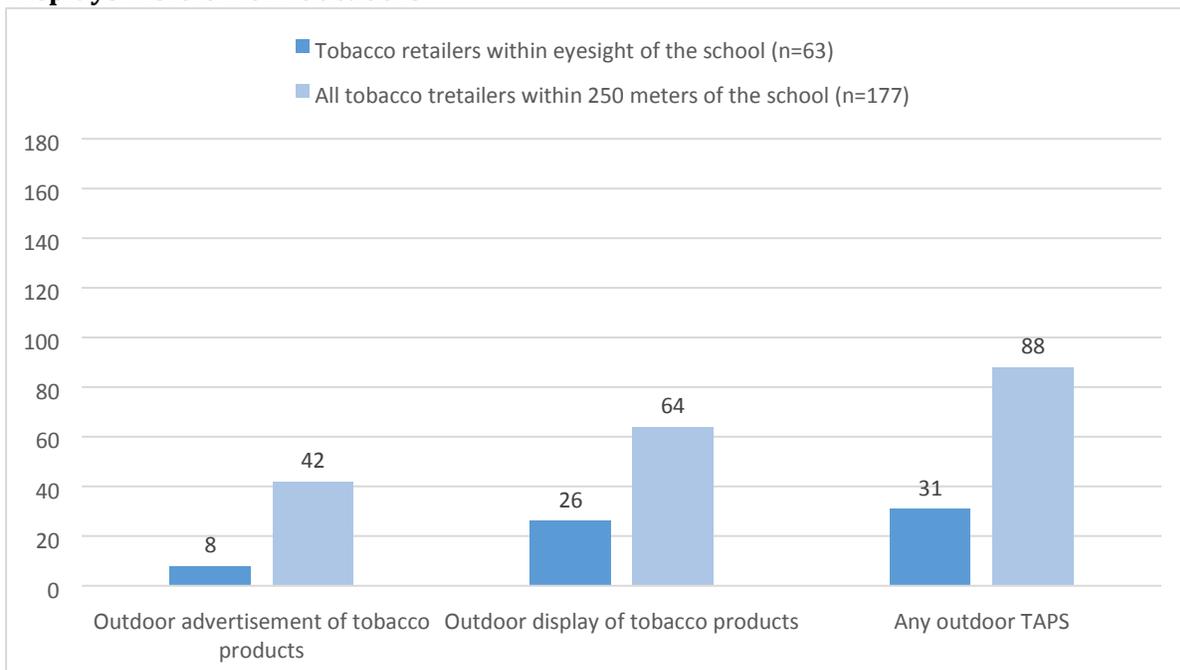


Figure 12. Tobacco Product Displays and Advertisements Visible from Outside



Data collectors identified 20 unique brands of tobacco that were displayed, advertised, or promoted at the POS (Figure XX). Marketing for Marlboro products was observed in 57.1% (n=101) of

retailers, followed by Boss (60.4%, n=107), Winston (60.4%, n=107), Camel (60.4%, n=107), West (60.4%, n=107), and (60.4%, n=107). Data collectors did not identify any tobacco retailers selling loose or single sticks of cigarettes.

Figure 13. Tobacco Brands Displayed at the Point-of-Sale

Tobacco Brand	Number of Retailers
Marlboro	101
Boss	77
Winston	75
Camel	58
West	46
Chesterfield	31
Glamour	15
L&M	10
Lucky Strike	8
Simple	7
Camel	5
Galloises	4
Philip Morris	4
Jockey	3
Vogue	3
Muratti	2
Drum	2
Rothmans	2
Davidoff	1
Walter Wolff	1

Discussion

This study demonstrates that harmful tobacco products and advertisements are placed in areas that are visible and accessible to minors and near schools. Tobacco products were observed on display in 90.0% of retailers, and were advertised in 42.0% of retailers. Brand stretching was also observed in 43.0% of tobacco retailers, and tobacco marketing was visible from outside the POS in half of all retailers that were observed. A wide variety of tobacco brands were available for sale.

Limitations

This study used a strategic selection of neighborhoods, and a convenience sample of schools and the retail locations surrounding them. Therefore, the results may not be representative of all types of tobacco retailers or generalizable to all areas of Slovenia.

Conclusions

Partial bans of tobacco product marketing allow the industry to exploit deficiencies or loopholes in the law by allocating their resources to mediums that are not regulated, that are poorly defined, or that are weakly enforced. Product display and advertising signage are common marketing practices that are noticeable to children walking by. Prior research has demonstrated that exposure to advertising increases the likelihood that children will start smoking,⁶ and the law, as it is currently implemented and enforced, is not effectively shielding children from this potential harm. A complete and enforced ban of tobacco product display, advertising, and promotion in retail locations would comply with FTC recommendations and more effectively achieve the goal of protecting the public from the harms of tobacco products.

Key Terms and Definitions

Advertising signage: branded print or digital/electronic media such as posters, banners, flyers, or shelf liners that are intended to promote awareness and favorable opinions of a tobacco brand or product

Brand stretching: the presence of non-tobacco items that carry a tobacco brand name

Cashier zone: directly on top of, in front of, or to the side of the counter or cash register where consumers make a purchase

Eye level of children: placement of products 1 meter or less from the ground

Power wall: an excessive display of tobacco products showing multiple packs on multiple shelves

Product display: physical packs of tobacco products that are visible to potential consumers

Reverse brand stretching: non-tobacco branding on tobacco products, advertisements, or promotions

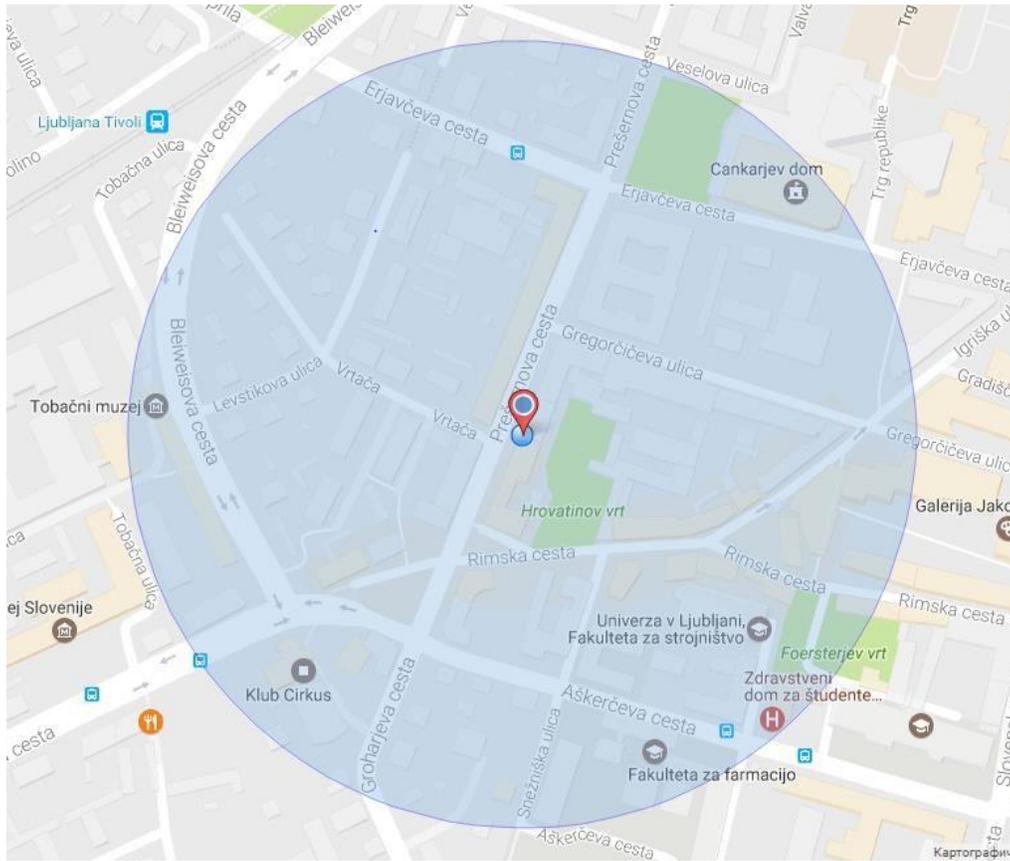
Sponsorship: contributing to any event or activity (sporting events, concerts, etc.) to promoting a tobacco product

Acknowledgements

This work was supported with funding from the Bloomberg Initiative to Reduce Tobacco Use.

Appendix A

100; Ekonomska šola Ljubljana; Prešernova cesta 6; Center; Ljubljana; Osrednjeslovenska; Slovenia



Please record the address of each store you observe. If needed, continue lettering and addresses on next page.

A.	F.
B.	G.
C.	H.
D.	I.
E.	J.

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