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Variability in Tobacco Friendliness Across Retail Outlets in the U.S.

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Introduction

Purpose

• To provide a thumbnail sketch of what we are observing in tobacco retail outlets that can help determine a store’s overall level of “tobacco friendliness.”

• Will present results obtained from data collected as part of the ImpacTeen Project on variations in cigarette placement, promotions, advertising, and pricing by store type.
Community Selection

- Selection of communities was determined by the location of separate nationally representative public school (excludes parochial, private, magnet, alternative, etc.) samples of 8th, 10th, and 12th grade students.

- For each index school, a catchment area, or community, was defined, reflecting the area from which the school draws its students.

- A list of all likely tobacco retailers located within the specified area was then generated.

- From that list a random sample of up to 30 tobacco retail outlets was selected for on-site observation (if less than 30 a census of retailers was selected).
1999 Store Observation Data

- Random sample of 2,972 tobacco retailers within 163 8th, 10th, and 12th grade school communities. (59 stores excluded from the analysis because of missing data)
- Observations conducted in 1999 from 2/16 to 6/23 to record price information for Marlboro and Newport cigarettes and evaluate levels of tobacco advertising, promotions and branded functional objects.

2000 Store Observation Data

- Random sample of 2,998 tobacco retailers within 167 8th, 10th, and 12th grade school communities. (90 stores excluded from the analysis because of missing data)
- Observations conducted in 2000 from 2/29 to 7/8 to record price information for Marlboro and Newport cigarettes and evaluate levels of tobacco advertising, promotions and branded functional objects.
Analysis

• All analyses were run by store type

• For continuous measures (price) we ran ANOVA models with F test analyses to test for significance.

• For categorical measures we ran chi-square tests of independence to test for significance.

• All results shown in this presentation are significant.
Breakdown of Sample by Store Type

- **All stores**: 33%
- **Convenience**: 12%
- **Gas/Conv**: 5%
- **Gas Station**: 11%
- **Grocery**: 9%
- **Supermarket**: 8%
- **Drug Store**: 2%
- **Liquor Store**: 8%
- **Tobacco Outlet**: 12%
- **Other**: 2%
An overview of Retail Store Observations

Pricing (Single Pack):

- Marlboro: 1999 – $2.92, 2000 – $3.26, Change: $0.34
- Newport: 1999 – $3.05, 2000 – $3.43, Change: $0.34

Advertising:

- Interior ads: 77% in 1999, 83% in 2000, Change: 6%
- Low Interior Ads: 42% in 1999, 37% in 2000, Change: 5%
- Exterior ads: 58% in 1999, 57% in 2000, Change: 1%

Promotions:

- Any/None: 1999 – 45%
- Marlboro: 2000 – 41%
- Newport: 2000 – 27%
# An overview of Retail Store Observations Cont’d

<table>
<thead>
<tr>
<th>Placement</th>
<th>1999</th>
<th>2000</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>On counter:</td>
<td>26</td>
<td>14</td>
<td>12</td>
</tr>
<tr>
<td>Off counter: (in view of clerk)</td>
<td>11</td>
<td>8</td>
<td>3</td>
</tr>
<tr>
<td>Off counter: (not in view of clerk)</td>
<td>3</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>Behind counter:</td>
<td>87</td>
<td>85</td>
<td>2</td>
</tr>
</tbody>
</table>
Clerk Assist Placement of Tobacco Products by Store Type

Placement of Cigarette Packs

Proportion of cigarettes placed by clerk assist, behind counter, locked, and special desk, categorized by store type:

- All Stores
- Convenience
- Gas/Conv
- Gas Station
- Grocery
- Supermarket
- Drug Store

The graph shows the proportion of cigarettes placed in different ways across various store types.
Self Service Placement of Tobacco Products by Store Type

![Graph showing self-service placement proportions by store type.]

- Any self service: All Stores, Convenience, Gas/Conv, Gas Station, Grocery, Supermarket, Drug Store
- Not in view of clerk: All Stores, Convenience, Gas/Conv, Gas Station, Grocery, Supermarket, Drug Store
- In view of clerk: All Stores, Convenience, Gas/Conv, Gas Station, Grocery, Supermarket, Drug Store
- On counter: All Stores, Convenience, Gas/Conv, Gas Station, Grocery, Supermarket, Drug Store

Proportion range: 0.0 to 1.0
Tobacco Promotions by Store Type

![Cigarette Promotions Chart](chart.png)

- **1999**:
  - All Stores
  - Convenience
  - Gas/Conv
  - Gas Station
  - Grocery
  - Supermarket
  - Drug Store

- **Marlboro 2000**:
  - All Stores
  - Convenience
  - Gas/Conv
  - Gas Station
  - Grocery
  - Supermarket
  - Drug Store

- **Newport 2000**:
  - All Stores
  - Convenience
  - Gas/Conv
  - Gas Station
  - Grocery
  - Supermarket
  - Drug Store
Interior Advertising by Store Type

Interior Store Ads

No Ads | Restricted Ads | Unrestricted Ads

Propotion

All Stores
Convenience
Gas/Conv
Gas Station
Grocery
Supermarket
Drug Store
Interior Low Height Advertising by Store Type

Low Interior Ads

Has Low Ads

Proportions

0.2

0.4

0.6

0.8

1

All Stores
Convenience
Gas/Conv
Gas Station
Grocery
Supermarket
Drug Store
Prevalence of Functional Objects by Store Type

Functional Objects

<table>
<thead>
<tr>
<th>Proportion</th>
<th>No Functional obj</th>
<th>1-2 F.O.</th>
<th>3-4 F.O.</th>
<th>5 or more F.O.</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Stores</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Convenience</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gas/Conv</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gas Station</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grocery</td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>Drug Store</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
1999 Exterior Advertising by Store Type

1999 Exterior Ads

Proportion

No exterior ads | Less than 5 | More than 5

- All Stores
- Convenience
- Gas/Conv
- Gas Station
- Grocery
- Supermarket
- Drug Store
2000 Exterior Advertising by Store Type

2000 Exterior Ads

Proportion

No exterior ads
Discrete
Moderate
In Your Face

All Stores
Convenience
Gas/Conv
Gas Station
Grocery
Supermarket
Drug Store
Variation in Marlboro and Newport Price by Store Type

Average Prices of Premium Cigarettes

<table>
<thead>
<tr>
<th>Store Type</th>
<th>Marlboro</th>
<th>Newport</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Stores</td>
<td>3.1</td>
<td>3.3</td>
</tr>
<tr>
<td>Convenience</td>
<td>3.0</td>
<td>3.2</td>
</tr>
<tr>
<td>Gas/Conv</td>
<td>2.9</td>
<td>3.1</td>
</tr>
<tr>
<td>Gas Station</td>
<td>2.9</td>
<td>3.1</td>
</tr>
<tr>
<td>Grocery</td>
<td>2.9</td>
<td>3.1</td>
</tr>
<tr>
<td>Supermarket</td>
<td>2.9</td>
<td>3.1</td>
</tr>
<tr>
<td>Drug Store</td>
<td>3.0</td>
<td>3.2</td>
</tr>
</tbody>
</table>
Conclusions

• Considerable variation exists across the nation in retailer demand/access environments.

• Policy makers, advocates and researchers may find that increased knowledge about retailer environments can help improve policy development aimed at limiting youth tobacco access.
PDF Versions Available

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