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Institute for Global Tobacco Control

Technical Report on Tobacco Marketing at the Point-of-Sale in La Paz, Bolivia

Product Display, Advertising, and Promotion around Primary and Secondary 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

La Paz is Bolivia's third-largest city, with an estimated population of 812,799 people¹⁰. In Bolivia, 38.6% of adult men and 11.2% of adult women smoke tobacco, as well as 19.3% of boys and 7.1% of girls¹¹. Bolivia ratified the FCTC in September of 2015¹². Currently, Bolivia's tobacco control laws do not regulate indoor advertising, promotion or tobacco product display at the point of sale. Law No. 3029 "On The Framework Convention On Tobacco Control" expressly prohibits any kind of publicity, promotion, sponsorship or display of tobacco products visible from outside, as well as on shelves, kiosks, or streets sales. The regulation of the law through decree 29376 also prohibits the sale of tobacco products less than 100 meters from primary or secondary schools; sales to minors under the age of 18; the sale of packs with fewer than 10 units; the provision of free tobacco products; and the sale of candy or toys resembling tobacco products. Indoor advertising for tobacco products, which should not be seen from the outside, is required to carry a designated health warning on 10% of the display area, and should include a sign stating that "Sales to minors under 18 are prohibited"¹³.

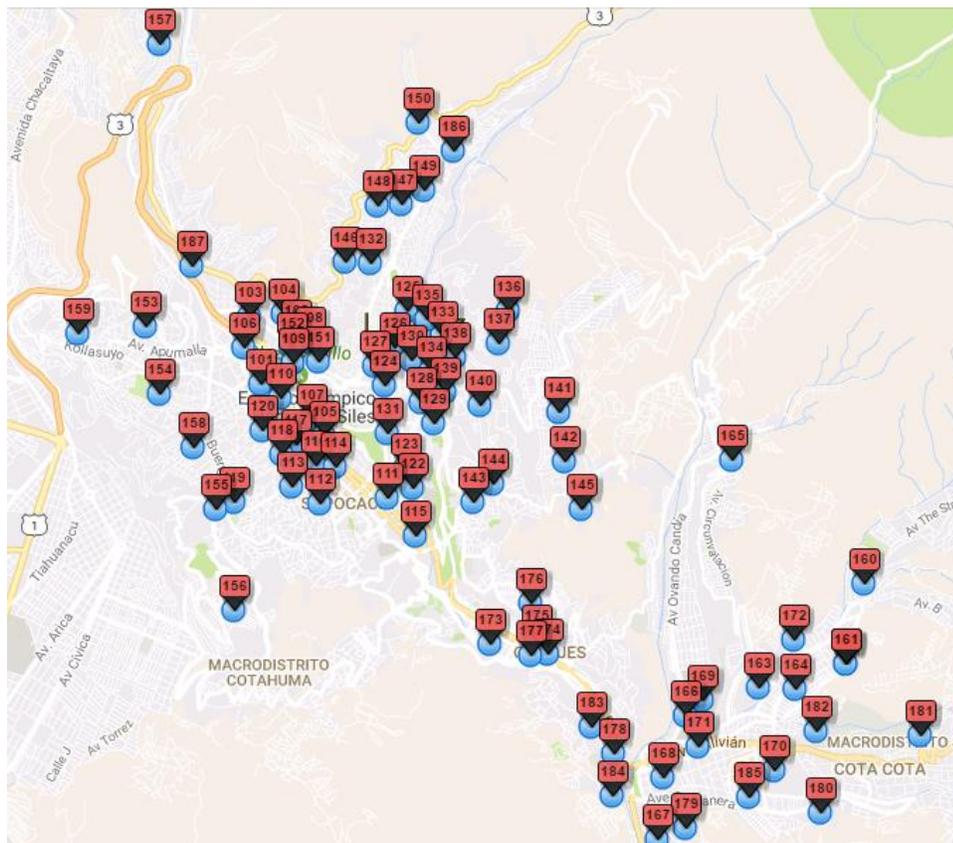
Methods

The following report describes a study about tobacco marketing at the point-of-sale in La Paz, Bolivia. The work was led by the Institute for Global Tobacco Control (IGTC) at Johns Hopkins Bloomberg School of Public Health (JHSPH). IGTC partnered with local tobacco control advocates at Fundación InterAmericana del Corazón Bolivia (FIC Bolivia), who provided guidance and context about the sampling framework. IGTC designed the survey instrument and data collection protocol, and trained the field workers to gather data and submitted daily reports for review in real-time. The IGTC study team was in La Paz for training and data collection 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 city of La Paz, Bolivia. FIC Bolivia identified and selected primary and secondary schools within the 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. Eighty-six schools were selected and assigned unique identification codes. An online mapping and distance software was used to define the sampling area radius of 100 meters surrounding each school, ensuring that none of the sampling areas overlapped. The study surveyed a convenience sample of supermarkets, general stores, mini-markets, neighborhood shops, kiosks/stands, billiards or cafes, and mobile vendors,

Figure 1. Selected Schools in La Paz (n=86)



Survey Instrument

The survey instrument was designed to address key components of Bolivia'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 (Figure 2). The survey also asked whether the store was 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

Prohibited Marketing Characteristics		
Any kind of advertising, promotion, sponsorship, or products display visible from outside		
Unregulated Marketing Characteristics		
<i>Product Placement</i>	<i>Advertising</i>	<i>Promotion</i>
In the cashier zone	Signage for tobacco products (posters, banners, flyers, shelf liners, etc.)	Price discounts (coupons, sales)
Behind the cashier zone	Giant packs or other 3-dimensional signage	Free gift (with or without purchase)
Hanging above or from the ceiling	Digital signage (video or electronic screen)	Free tobacco product
1 meter or less from the floor	Using movement	Candy or toys that imitate tobacco products
On a power wall of tobacco products	Using lights	Offer for loyalty programs
On a branded stand or cabinet	Mention of web pages or social media	Offer for contest or competition
Using lights	Mention of flavors (not menthol)	Tobacco industry sponsored events
Using movement	Mention of menthol	Presence of tobacco brand representative
With toys	Use of words in English	Smoking accessories with tobacco branding
Packs with flavors (not menthol)		Other products with tobacco branding (hats, t-shirt, phone case)
Packs with flavors		Store products with tobacco branding (mirror, trash can, change dish)

Data Collection Protocol

Observations and photos were collected during normal business hours from 318 retailers from July 28 – 29, 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 100-meters radii, 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 Maggi, 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 IGTC study team reviewed these reports daily in order to check the uploaded dataset and ensure that the mobile software application was functioning properly.

Training

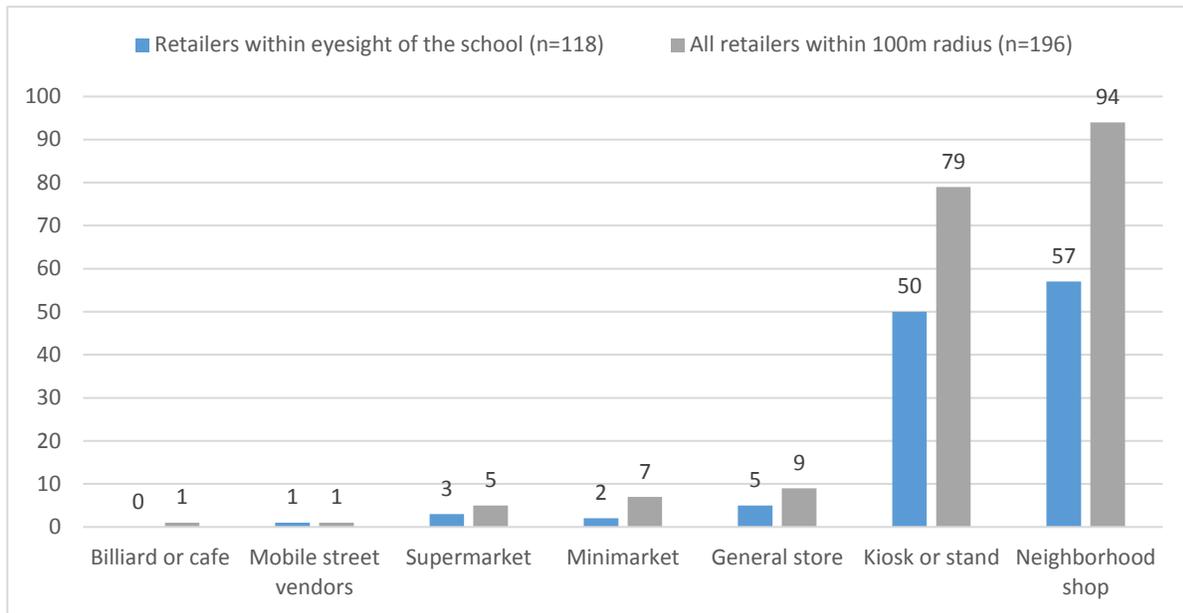
Six data collectors attended a two-day training on the study protocol from July 26-27, 2016 – immediately before the data collection period. The IGTC study team explained in detail the purpose of the study, the current tobacco control law, the survey content, key terms and definitions, the Maggi software 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 health warnings on packages. 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 76 of the 86 school sampling areas selected, and identified 318 retailers within 100-meters of the schools– 196 (61.6%) of which sold tobacco products. The sale of tobacco is currently prohibited within 100-meters of schools. Retailers that sold tobacco products were identified within 66 of the 88 school sampling areas observed. One hundred and eighteen of these tobacco retailers were located within eyesight of a school (60.2%). The one mobile street vendor in the sample was analyzed separately based on the limited number of observations possible at this type of vendor. Only general information, product availability, and outdoor observations were collected from this retailer.

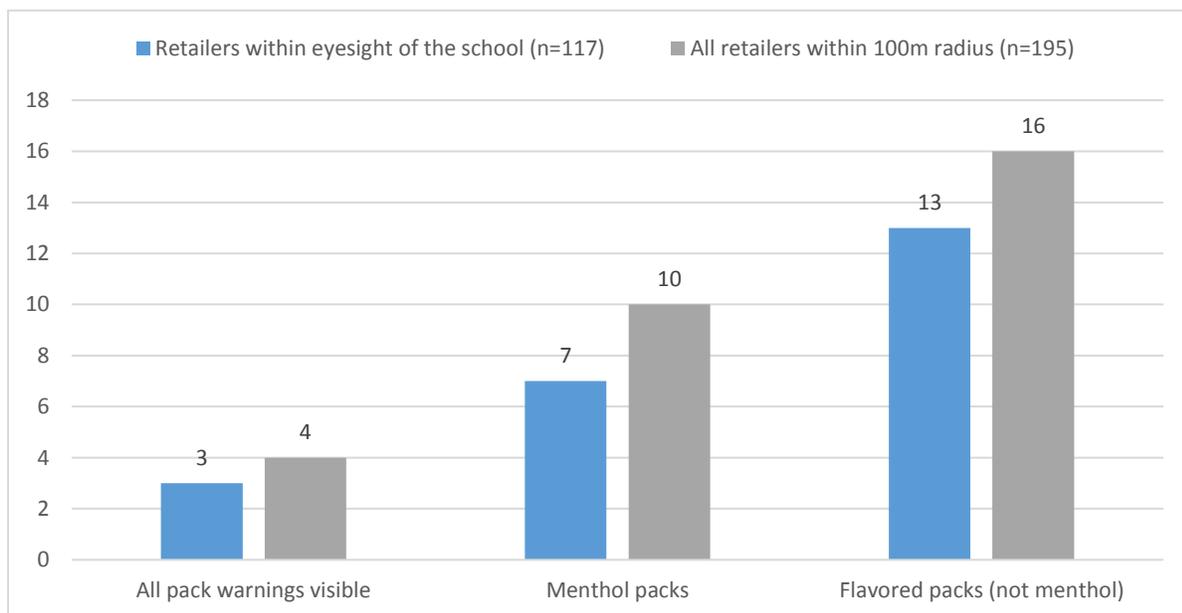
Data collectors also recorded indoor observations and photos from 195 of the 196 tobacco retailers included in the sample. Most retailers were either neighborhood shops (48%) or kiosks/stands (40.3%), followed by general stores (4.6%), mini-markets (3.6%), supermarkets (2.5%), a mobile street vendor (0.5%), and a billiard or café (0.5%) (Figure 3).

Figure 3. Number of Tobacco Retailers Observed by Type



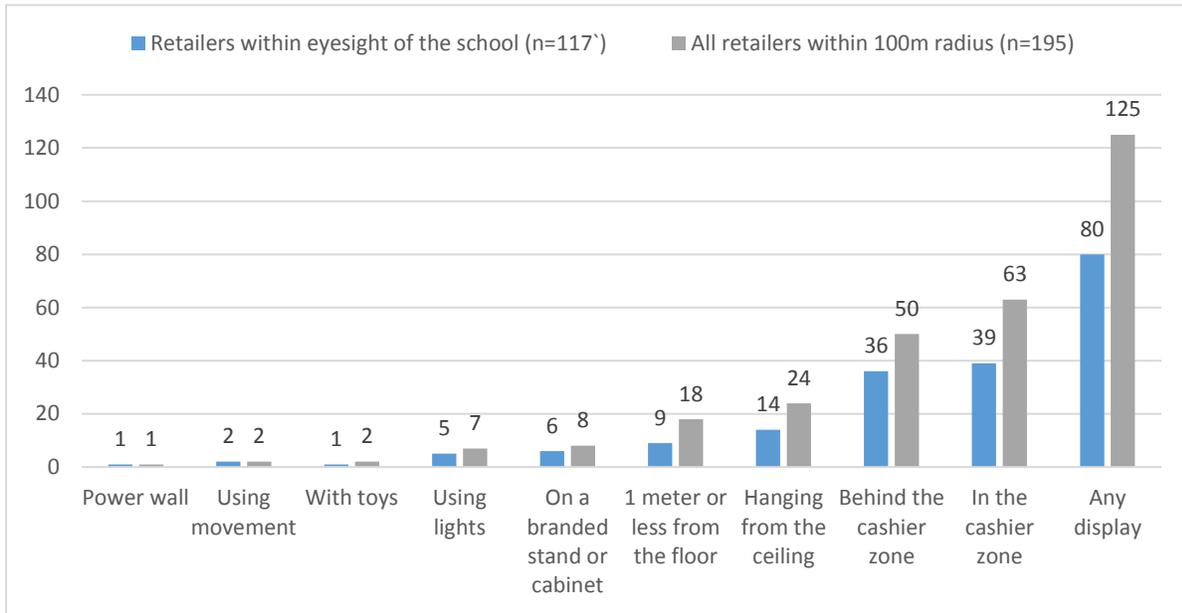
Only 2% of all retailers displayed all tobacco packs with visible warning labels, while 5.1% displayed packs with menthol, and 8.2% displayed packs with flavored tobacco products (Figure 4).

Figure 4. Number of Tobacco Retailers With Flavors, Menthol, or Health Warning Labels Visible on Packs



Among all tobacco retailers observed, 64.1% displayed tobacco products at the point of sale. Tobacco was most frequently placed in the cashier zone (32.3%), behind the cashier zone (25.6%), and/or hanging from the ceiling (12.3%). Tobacco products were also placed at the eye-level of children (1 meter or less from the floor) in 9.2% of retailers (Figure 5).

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

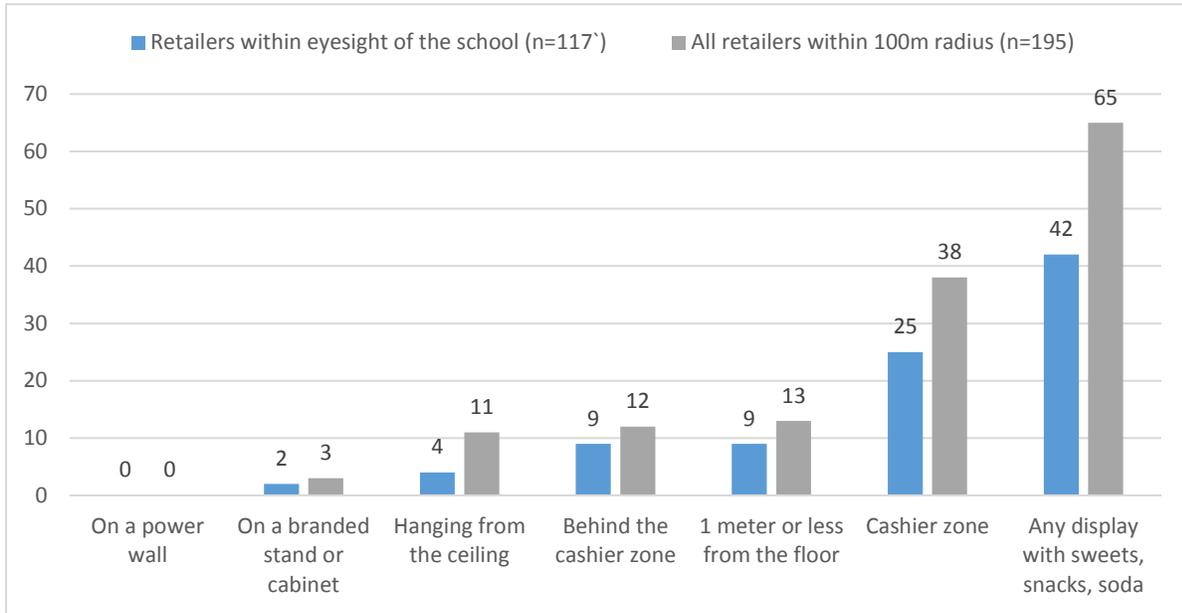


Tobacco products were placed near sweets, snacks or soda in one-third of all retailers, most frequently in the cashier zone (19.5%) (Figures 6 & 7).

Figure 6. Tobacco Products Displayed Near Candy at the Point-of-Sale



Figure 7. Number of Tobacco Retailers with Tobacco Products Displayed Near Sweets, Snacks or Soda



Tobacco advertising was observed in 18.5% of all retailers. Print signage was the most prevalent advertising tactic, observed in 15.4% of retailers (Figures 8 and 9).

Figure 8. Number of Tobacco Retailers with Advertising Signage

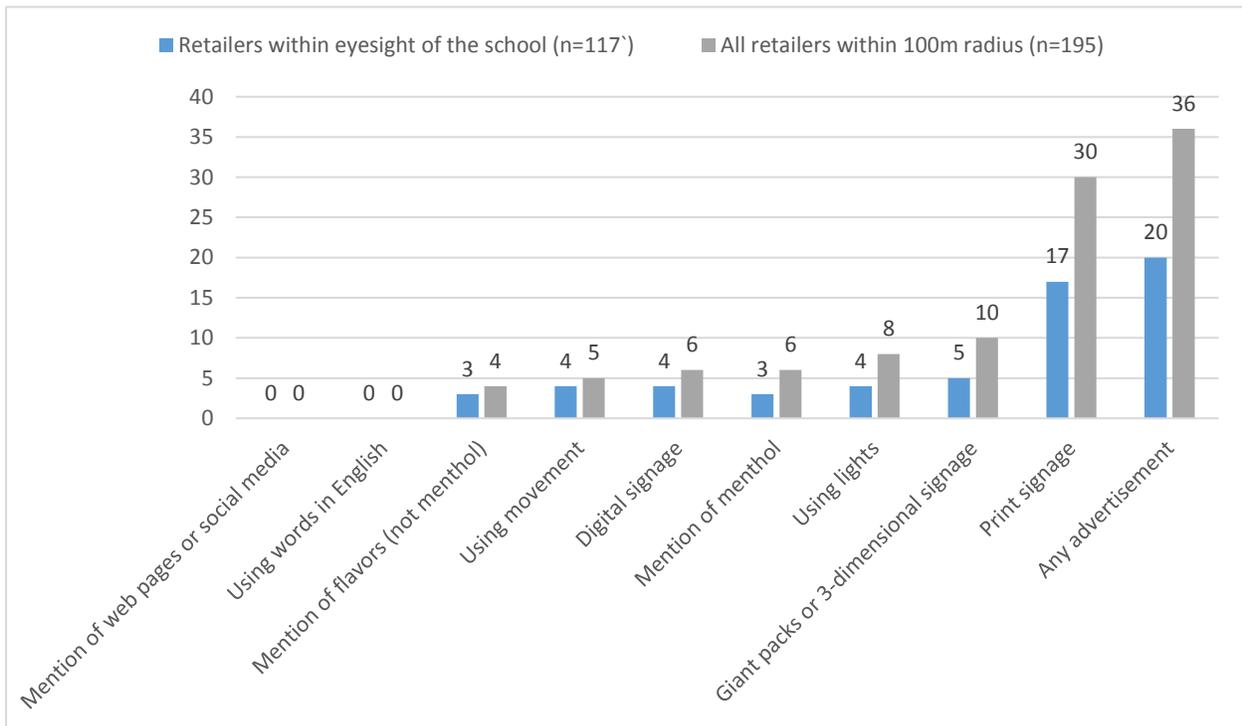
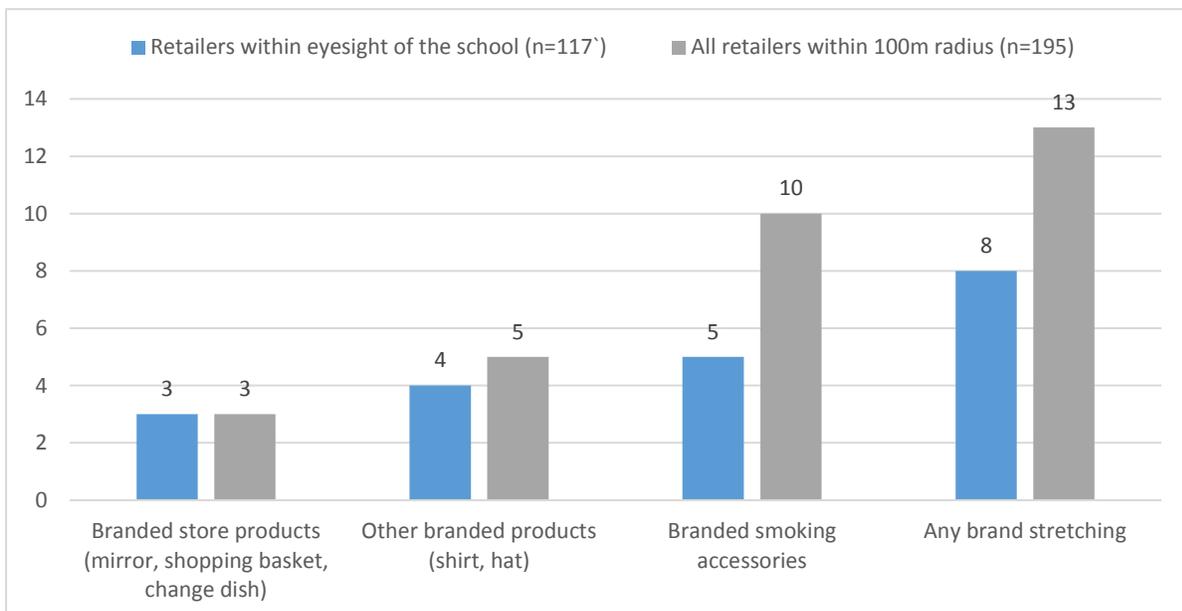


Figure 9. Print Signage for Flavored Cigarettes



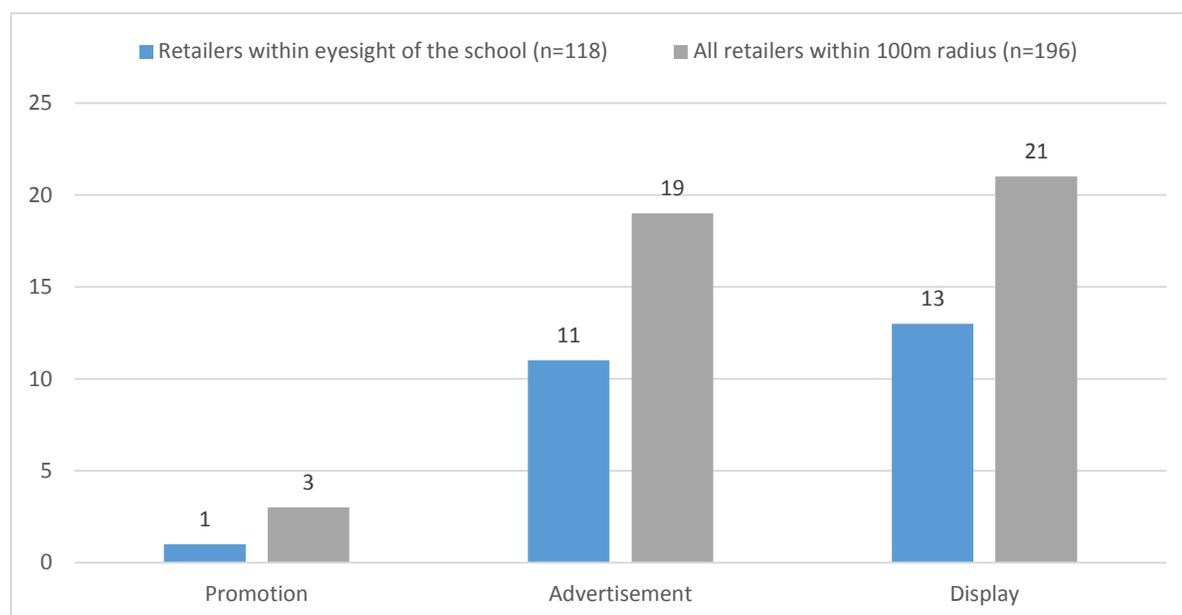
Tobacco product promotions were rarely observed. Only 1.5% (3) of retailers offered free gifts, 2.6% (5) offered price discounts, and 2.6% (5) offered any kind of promotion. Data collectors did not observe free tobacco products, imitation tobacco products, offers for loyalty programs, contests or competitions, sponsored events, or the presence of a brand representative in any of the retailers included in the sample. Brand stretching was present in 6.7% (13) of all retailers, and may have included smoking accessories, products for customers, or items in the store such as garbage cans (Figure 10).

Figure 10. Number of Tobacco Retailers with Brand Stretching



Tobacco product displays were visible from outdoors at 10.7% of retailers, and outdoor advertising was visible at 9.7% of all retailers. Tobacco product promotions were only observed outdoors at 1.5% of retailers (Figure 11). All of these marketing tactics are currently prohibited when visible from outside a retail location.

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



The most frequently observed brands included L&M (88.7%), Derby (86.7%), and Camel (45.6%) (Figure 12). Single-stick cigarettes were sold in 56.1% of retailers located within eyesight of the school, and in 90.6% of all retailers located within 100-meters of the schools.

Figure 12. Tobacco Brands Present at the Point-of-Sale

	Retailers within eyesight of the school (n=117)	All retailers within 100m radius (n=195)
Djarum	0	1
Astoria	3	8
Lucky Strike	5	8
Casino	8	10
Marlboro	32	52
Camel	57	89
Derby	99	169
L&M	105	173

Discussion

All of the tobacco retailers included in the sample were located within 100 meters of a school, which is currently prohibited by Bolivia's tobacco control law. Some of these retailers advertised tobacco products, and many displayed them at the point-of-sale. These marketing strategies are not currently regulated at the point-of-sale in Bolivia.

Limitations

This study uses 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 Bolivia.

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. This study demonstrates that harmful tobacco products and advertisements are placed in areas that are visible and accessible to minors. A complete and enforced ban of tobacco product display, advertising, and promotion in retail locations would comply with FCTC 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

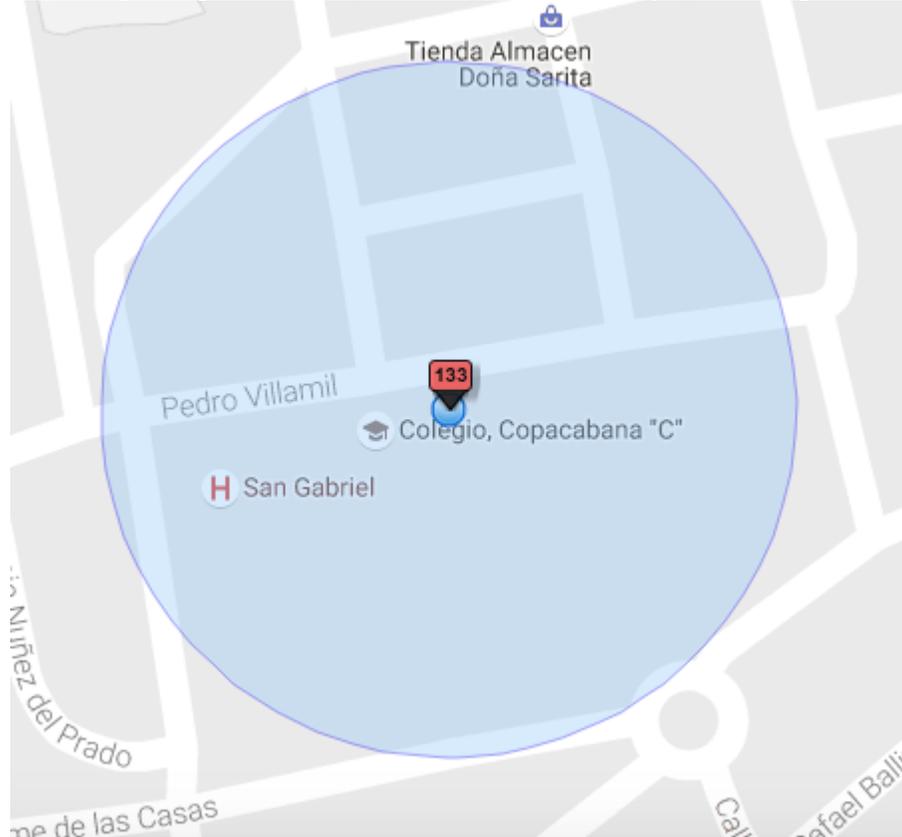
Product display: physical packs of tobacco products that are visible to potential consumers

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

Appendix A. School Sampling Area Map

133, Colegio Copacabana A, Calle Pedro Villamil S/N, Villa Copacabana



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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