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Institute for Global Tobacco Control

Technical Report on Tobacco Marketing at the Point-of-Sale in Nairobi, Kenya

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 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

Kenya became a party to the FCTC on February 27, 2005.¹⁰ Among Kenya's just under 46 million residents,¹¹ an estimated 20.2% of adult men, and 1.4% of adult females use tobacco daily, with 11.2% of boys, and 5.2% of girls being recorded as current smokers, which is more than on average in low-income countries.¹² Of students who currently use tobacco products, 18% buy cigarettes from a store.¹³

Kenya's current tobacco control laws specifically ban advertising on any medium of electronic, print or any other form of communication. The law provides no exceptions for point-of-sale advertising and promotion. The law also specifically prohibits product display that permits a person to handle the tobacco product before paying for it, thereby requiring that products be held or displayed behind the counter. Additionally, the definition of 'advertisement' within the current law includes product stacking or products displays of any kind or size. Thus, any means of tobacco product advertising, tobacco product stacking, and tobacco displays are prohibited at the point-of-sale. These provisions of the law align with FCTC Art. 13 and the FCTC Art. 13 Guidelines with respect to point-of-sale advertising and promotion and point-of-sale product display.

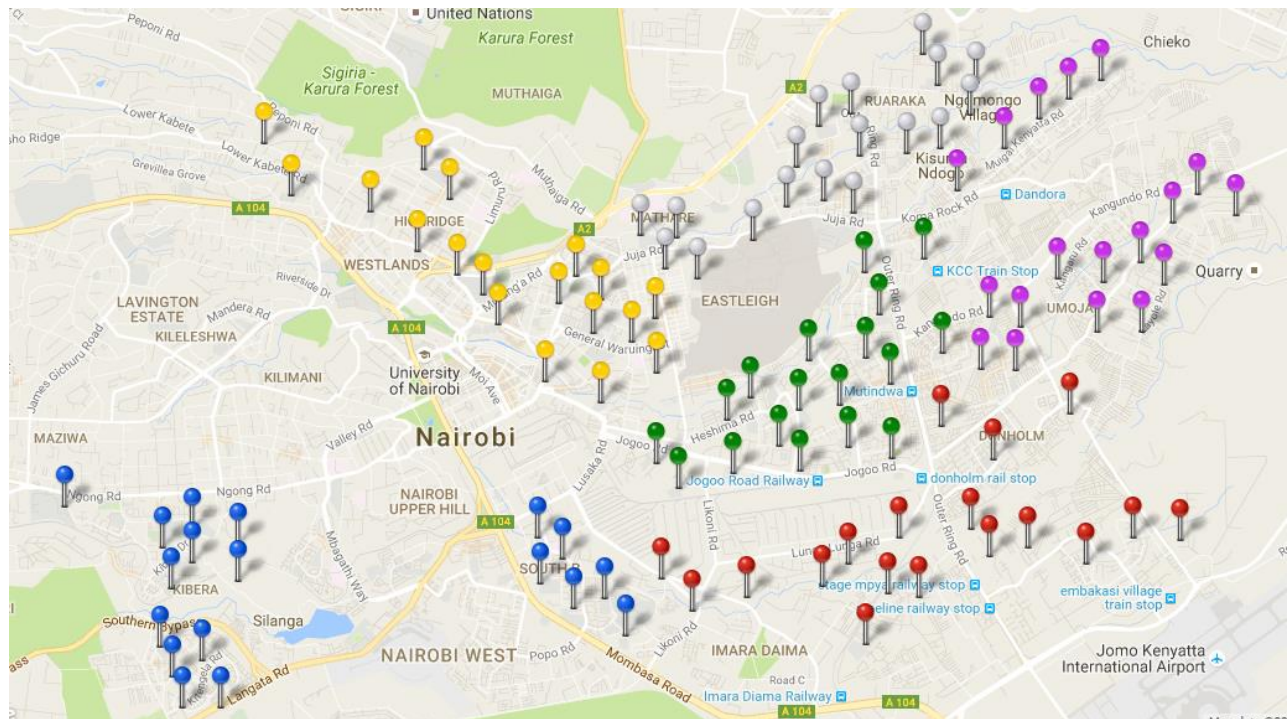
Methods

This report describes a study about tobacco marketing at the point-of-sale in Nairobi, Kenya. 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 the Consumer Information Network (CIN) in Nairobi, who provided guidance and context about the sampling framework. IGTC designed the survey instrument and data collection protocol. Investigators from IGTC trained 6 university students to conduct the fieldwork and submit daily reports for review in real-time. The IGTC study team was in Nairobi 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 Nairobi, Kenya's capital and largest city with a population of just under 4 million.¹¹ 112 schools were selected within the city boundaries, with consideration for the (1) retail density, (2) school density, and (3) ease of accessibility for data collectors traversing the cities via public transportation (Figure 1). Each school was assigned a unique identification code. An online mapping and distance tool was used to define a sampling area radius of 250 meters surrounding each school, ensuring that none of the sampling areas overlapped. The study surveyed a convenience sample of supermarkets, convenience stores or gas stations, small/independent grocers, liquor stores & bars, sidewalk vendors, mobile/street vendors, and kiosks within each sampling area that sold tobacco products.

Figure 1. Selected Schools in Chisinau (n=112)



Survey Instrument

The survey instrument was designed to address key components of Kenya's tobacco control law that allow or regulate 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 brands of tobacco products displayed or advertised, and other notes or comments about the retailer.

Figure 2. Survey Instrument Content

Types of Advertising and Promotion at Points of Sale	
<i>Product Placement</i>	Additional Means of Advertising and Promotion
Cashier zone	Discounts
Behind the cashier zone	Free tobacco product
Hanging from the ceiling	Contest and/or competitions
Eye level of children	Imitation cigarette products
On a power wall	Presence of a brand representative
Near sweets, snacks or soda	
On a branded stand or cabinet	
Accessible to customers	
<i>Display or Ad Characteristic</i>	
Signage	
Mention of flavors and/or vitamins	
Use of lights	
Signage and Visibility of Health Warnings	
Signage that sales are prohibited to youth	
Visible pack warning labels	

Data Collection Protocol

Observations and photos were collected from retailers during normal business hours from July 27-29, 2016. Each data collector received a packet of sampling area maps including the unique school identification code and space to record the addresses of tobacco retailers in that area (Appendix A). Street names and radii boundaries were clearly visible on all sampling area maps, and data collectors were instructed to use nearest intersections and landmarks to stay within the confines of the radii boundaries. Data collectors began identifying points-of-sale within the sampling area by using the maps to follow a spiral-walking pattern, observing all streets within the 250-meter radius. All supermarkets, convenience stores or gas stations, small/independent grocers, liquor stores & bars, sidewalk vendors, mobile/street vendors, and kiosks were selected for observation. The school code, address, school visibility, and store type were still recorded at 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 was able to capture 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 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 university students attended a full day of training to use the study protocol on July 26, 2016 – immediately before the data collection period. The 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 were oriented to the Kenyan tobacco control policies and trained to recognize required health warnings, signage announcing sales restrictions, and other aspects relevant to the study. 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.

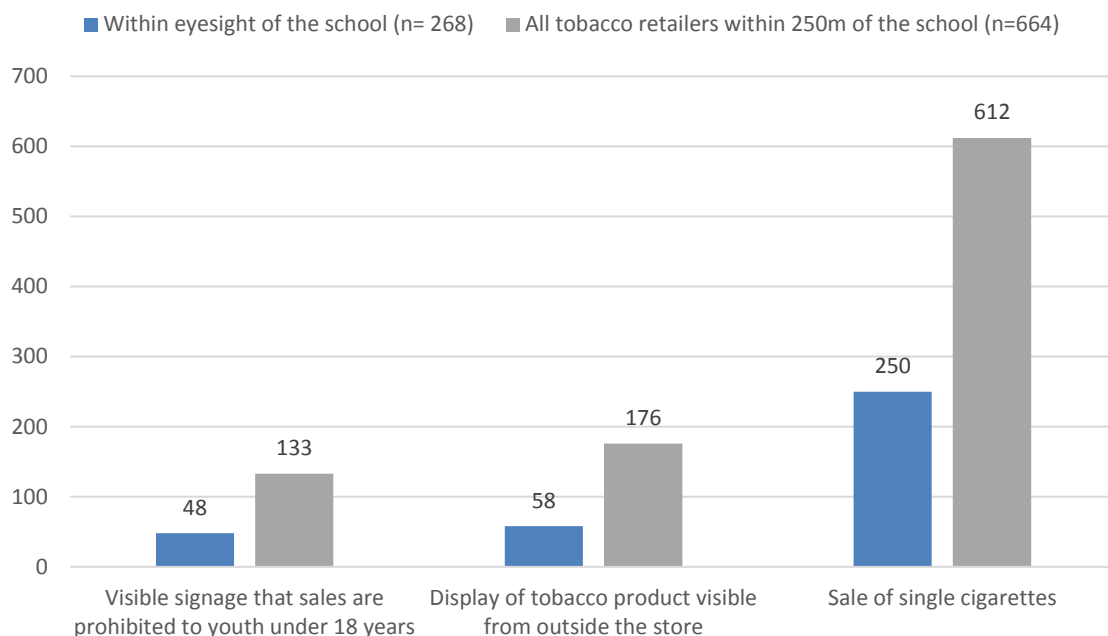
Results

There were a total of 106 out of the originally selected 112 school sampling areas observed. Data collectors observed 860 retail outlets within a 250-meter radius of schools – 268 of which were located within eyesight of the school. 664 retailers (77%) sold tobacco. Of the 106 school sampling areas, all contained at least one retailer that sold tobacco products.

Regarding the display of signage indicating that sales are prohibited to youth under 18 years: of the tobacco retailers observed (664), 133 (20%) displayed signage that sales are prohibited to youth under 18 years. A similarly low compliance rate (17%) was found for those retailers that sold tobacco within eyesight of the school (Figure 3).

Of the 664 tobacco retailers observed, almost all (612) sold single cigarettes, 250 within eyesight of the school (Figure 3). The sale of single cigarettes is prohibited by the current Kenya tobacco control law.

Figure 3. Number of Retailers with Age Restriction Signage, Product Display Visible from Outside the Store, and Selling Single Cigarettes



Within eyesight of the school, tobacco products were mostly displayed in (73%), or behind (17%) the cashier zone. 8 of all observed tobacco retailers (664) had health warning labels visible on all displayed packs (Figure 4), which is required by Kenya’s current law. Tobacco products on display were accessible to customers at 48 retailers, 18 of which were within eyesight of the school.

Figure 4. Number of Retailers with Tobacco Product Displays by Location

	Within eyesight of the school (n=268)	All retailers within 250m of the school (n=664)
In the cashier zone	196	312
Behind the cashier zone	48	76
Hanging from the ceiling	1	2
Eye level of children	16	20
On a branded stand or cabinet	18	5

Of particular interest and concern was the presence of tobacco products displayed in the vicinity of sweets, snacks, or soda: 555 (84%) of all tobacco retailers observed displayed their tobacco products near these products at the point-of-sale. Out of the tobacco retailers observed within eyesight of the school, 212 (79%) of them displayed their products near sweets, snacks, or soda (Figures 5 and 6).

Figure 5. Display of Tobacco Products near Sweets, Snacks, or Soda by Location

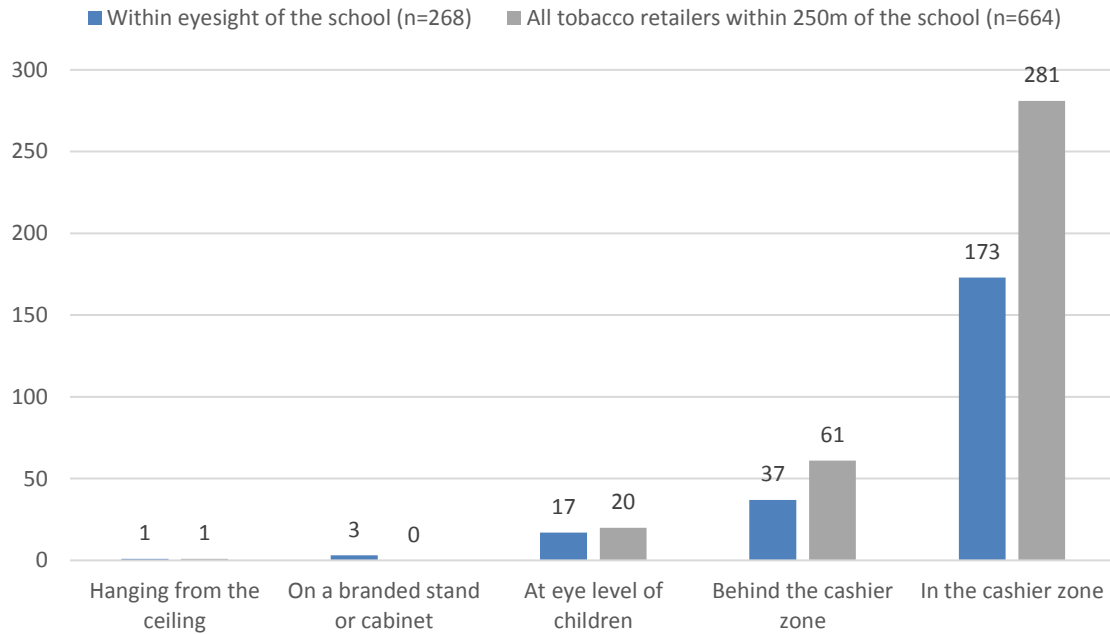


Figure 6. Tobacco Products Displayed with Sweets, Snacks, or Soda



As previously stated, Kenya's tobacco control laws specifically ban advertising on any medium of electronic, print or any other form of communication, including those at the point-of-sale.

Compliance with this aspect of the law was found to be high, with advertising signage being observed at only 3 tobacco retailers.

Similarly, observed compliance with Kenya’s ban on promotional activities was also high: only 1 instance of tobacco product promotion (a loyalty scheme) was observed.

Tobacco product brand stretching was also scarce, with only 6 instances of tobacco branding on non-tobacco products being noted by fieldworkers.

Sportsman and Supermatch were the most frequently displayed brands of tobacco products at the point-of-sale at observed retail outlets, followed by Dunhill and Horseman (Figure 7).

Figure 7. Tobacco Brands Displayed at the Point-of-Sale

Brands Displayed at the POS	# of Retailers
Sportsman	473
Supermatch	231
Dunhill	123
Safari	315
Horseman	12

Discussion

This study identified numerous examples of retail outlets that displayed tobacco products in close proximity to schools and thus making them easily accessible by students. Additionally, the vast majority of these retailers (all but 8) did not properly display the warning labels on all displayed products at their outlets, contravening the current law and allowing the tobacco industry to utilize their product packaging as a form of advertising to the public in a jurisdiction where this is specifically banned.

Disturbingly, only 20% of observed retailers displayed signage that sales are prohibited to youth under 18 years. In addition to this, the sale of single cigarettes, which have been shown to be more accessible to youth due to their affordability, was observed at almost all of the tobacco retailers. This is in direct contradiction to the law and is of great concern.

In the majority of observed stores (84%), tobacco products were displayed at the point-of-sale alongside products that appeal to children, such as candy and soda.

Limitations

This study used a convenience sample of schools in one city. Therefore, the results may not be representative of all types of tobacco retailers or generalizable to all areas of Kenya.

Conclusions

This study demonstrates that harmful tobacco product displays are serving as advertisements in areas that are visible and accessible to minors. A complete ban of tobacco product display, in a jurisdiction where advertising, and promotion are already banned in retail locations (such as Kenya)

would comply with FCTC recommendations and more effectively protect the public, especially youth from 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

Appendix A. School Sampling Area Map

208 Westlands Primary School 190 School Lane, Nairobi, Kenya



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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