Technical Report on Tobacco Marketing at the Point-of-Sale in Cape Town, South Africa

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]

Among South Africa's population of over 3.7 million people[10], 22.2% of men and 9% of women smoke, as well as 17.9% of boys and 10.6% of girls, respectively[11], South Africa ratified the FCTC in July of 2005[12]. The "Tobacco Products Control Act" and "Regulations Relating to the Display of Tobacco Products at Wholesale and Retail" clearly prohibit advertising, promotion, and sponsorship of tobacco products by direct or indirect means. However, the law allows for a single "sales unit" to display tobacco products that is not on the counter or accessible to the public. The law also allows retailers to display a single "price ticket" for each product line sold, or a single price list of all tobacco products. The regulations state that sales units should only display one pack per product line, should contain no more than 100 products, and should not be located within one meter of products intended for children. Retailers may display sales units no greater than $1m^2$ in size, while tobacco shops may display sales units up to $4m^2$ in size – however, most of these regulations do not apply if the entire area of the retailer is under $15m^2$.[13]

Methods

The following report describes a study about tobacco marketing at the point-of-sale in Cape Town, South Africa. The work was led by the Institute for Global Tobacco Control (IGTC) at Johns Hopkins Bloomberg School of Public Health (JHSPH). IGTC partnered with 8 local and experienced field-workers from the University of Western Cape (UWC), 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 submit daily reports for review in real-time. The IGTC study team was in Cape Town 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 Cape Town, South Africa. An IGTC staff member who is native to South Africa 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. Ninety-nine schools were selected and assigned unique identification codes. An online mapping and distance software was used to define the 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/petrol stations, small/independent grocers, shebeens/alcohol stores/bars, cafes, tobacco shops, mobile vendors, street/sidewalk vendors, and spaza shops.

Figure 1. Selected Schools in Cape Town (n=99)
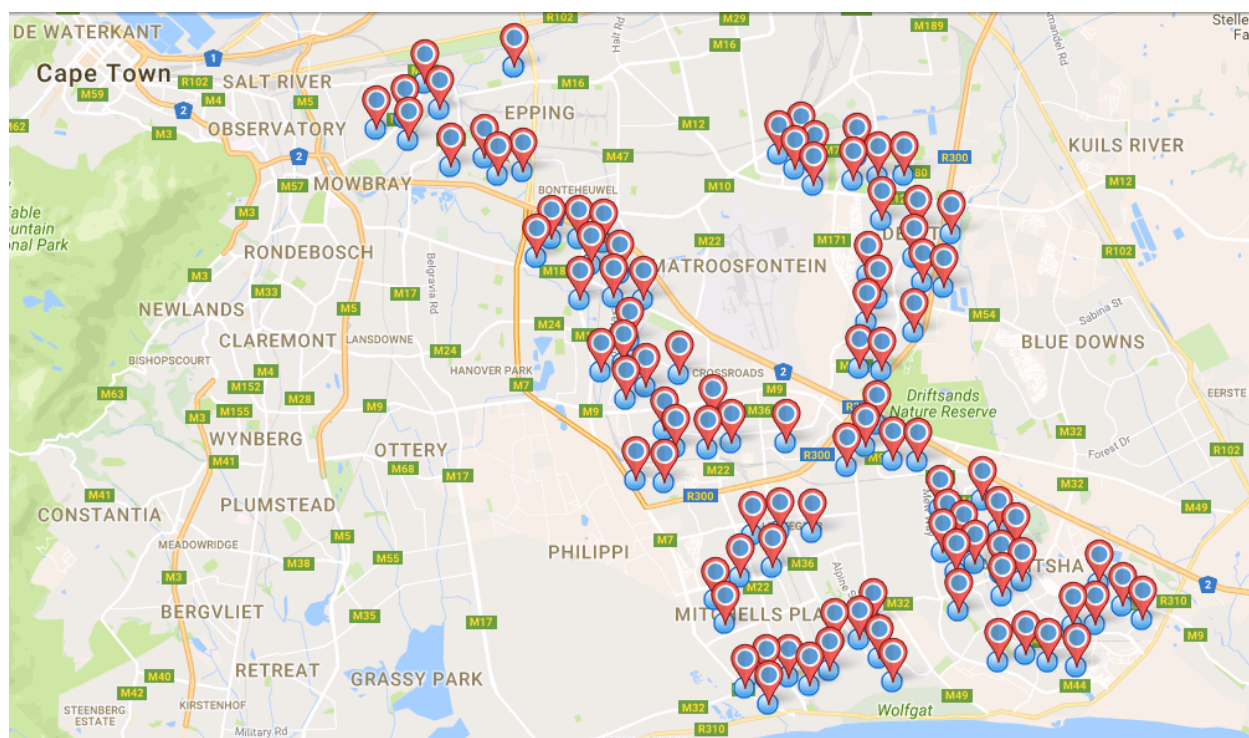
Survey Instrument
The survey instrument was designed to address key components of South Africa's tobacco control law that allows or regulates different types of tobacco product placement, promotion, health warnings, and sales restrictions, as well as known trends in POS marketing that may target youth (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.
The survey used a skip pattern for certain types of vendors that could not structurally support indoor advertising, promotions, or product display, including mobile vendors, street/sidewalk vendors, and spaza shops – only outdoor observations were collected from these retailer types. Additional observations about indoor marketing were collected from supermarkets, convenience stores/petrol stations, small/independent grocers, shebeens/alcohol stores/bars, cafes, and tobacco shops.

Figure 2. Survey Instrument Content

Product Display and Placement Characteristics	Advertising	Promotions
Outside of a display unit	Using video	Discounts (coupons, rebates)
In/on a display unit with brand elements (colors, logos)	Using mirrors or holograms	Free tobacco product (with or without purchase, buy one get one)
On a power wall	Branded signage (posters, banners, flyers, shelf liners, standsetc.)	Free gift (with or without purchase)
Showing more than 1 pack per brand	Branded price tags	Loyalty scheme (sign up for rewards, join to earn points)
In front of counter, 1m or less from floor	Mention of flavors	Contest or competition (enter to win)
Using lights	Mention of menthol	Imitation tobacco products (candy or toys)
Using movement	Branded smoking accessories (lighters, ash trays)	Presence of brand representative
Can you access of handle products without help of a cashier?	Other branded products (e.g. clocks, shopping baskets, change trays)	Sponsored event or activity
Display unit behind the counter		

Data Collection Protocol

Observations and photos were collected during normal business hours from 173 retailers July 14 – 15, 2016. Two data collectors returned to the field to observe the 62 aditional retailers from August 15-17. Data collectors worked in pairs, each receiving 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-meter and were instructed to use 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 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

Eight data collectors attended a two-day training on the study protocol from July 12-13, 2016 – immediately before the first wave of 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 Mapgi 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 age restriction notices. 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 all 99 of the school sampling areas selected and identified 233 retailers – 222 of which sold tobacco products. One-hundred and six of these tobacco retailers were located within eyesight of a school. Following the survey's skip pattern, observations and photos were collected from both inside and outside of 128 supermarkets, convenience stores/petrol stations, small/independent grocers, shebeens/alcohol stores/bars, cafes, tobacco shops (73 within eyesight of the school). Only outdoor observations were collected from 94 mobile vendors, street/sidewalk vendors, or spaza shops (33 within eyesight of the school).

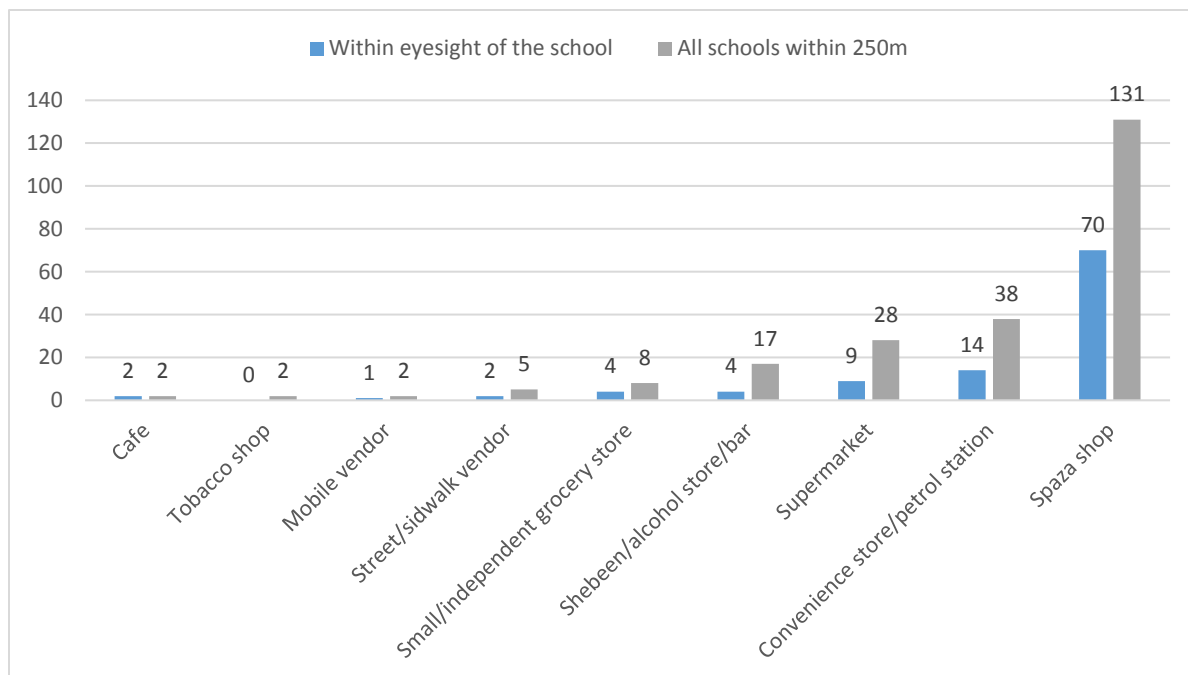**Figure 3. Number of tobacco retailers within eyesight of the school by type**

Figure 4. Number of Tobacco Retailers with Tobacco Product Displays Inside the Point-of-Sale
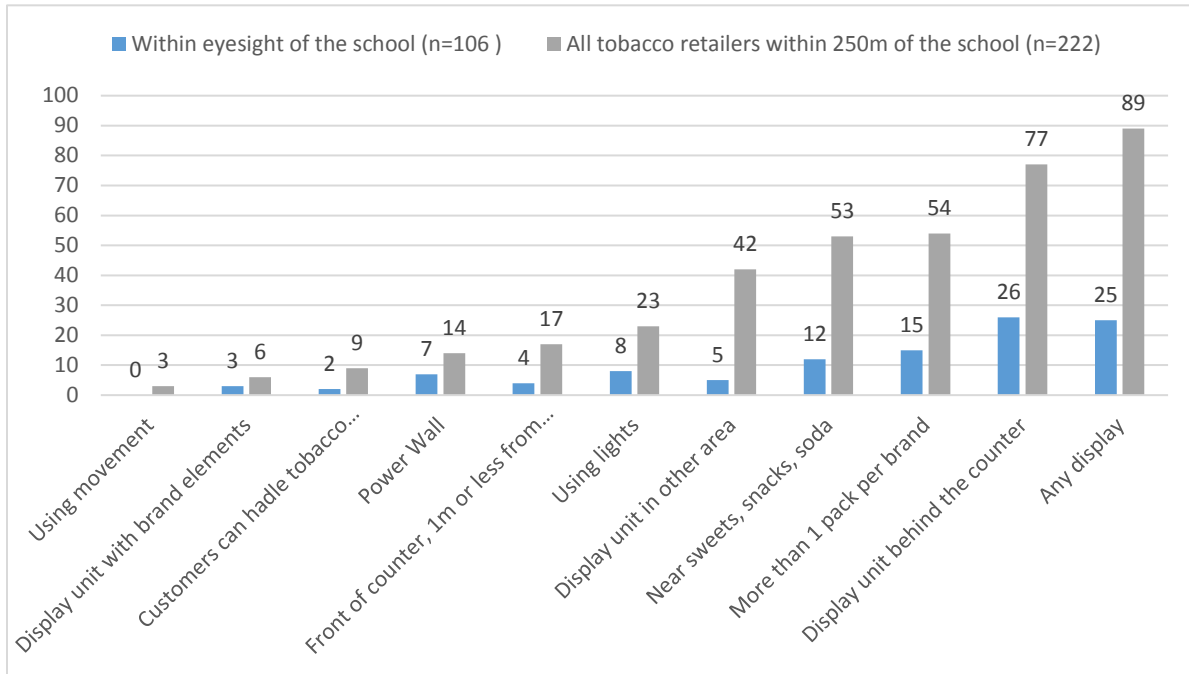

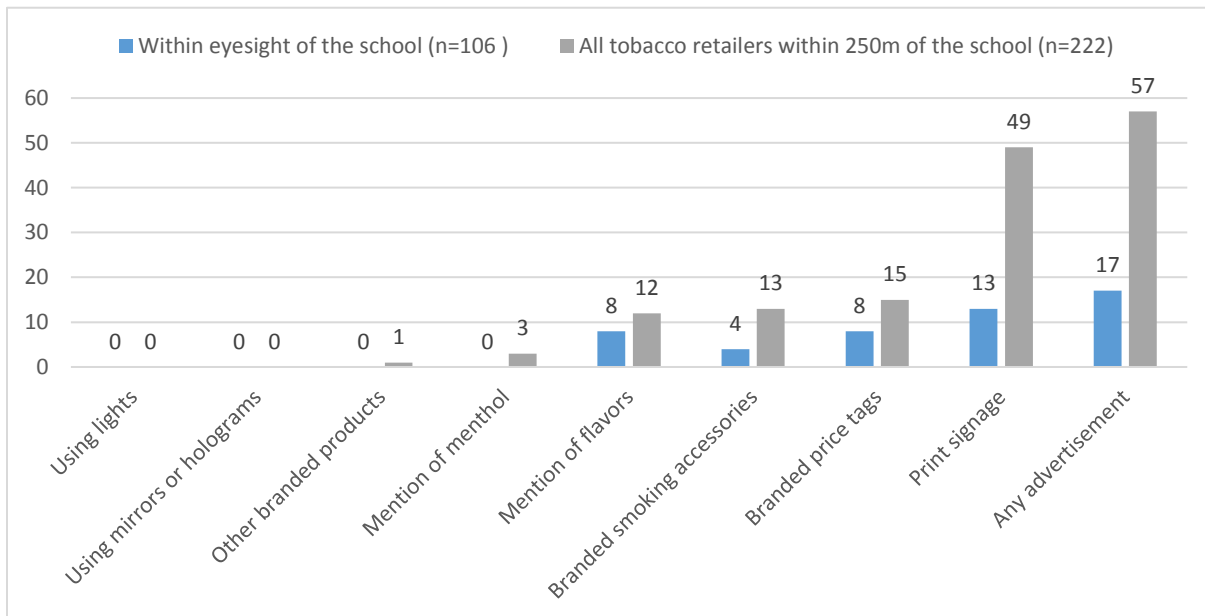**Figure 5. Number of Tobacco Retailers with Advertising Signage**

Figure 6. Number of Tobacco Retailers with Promotion of Tobacco Products
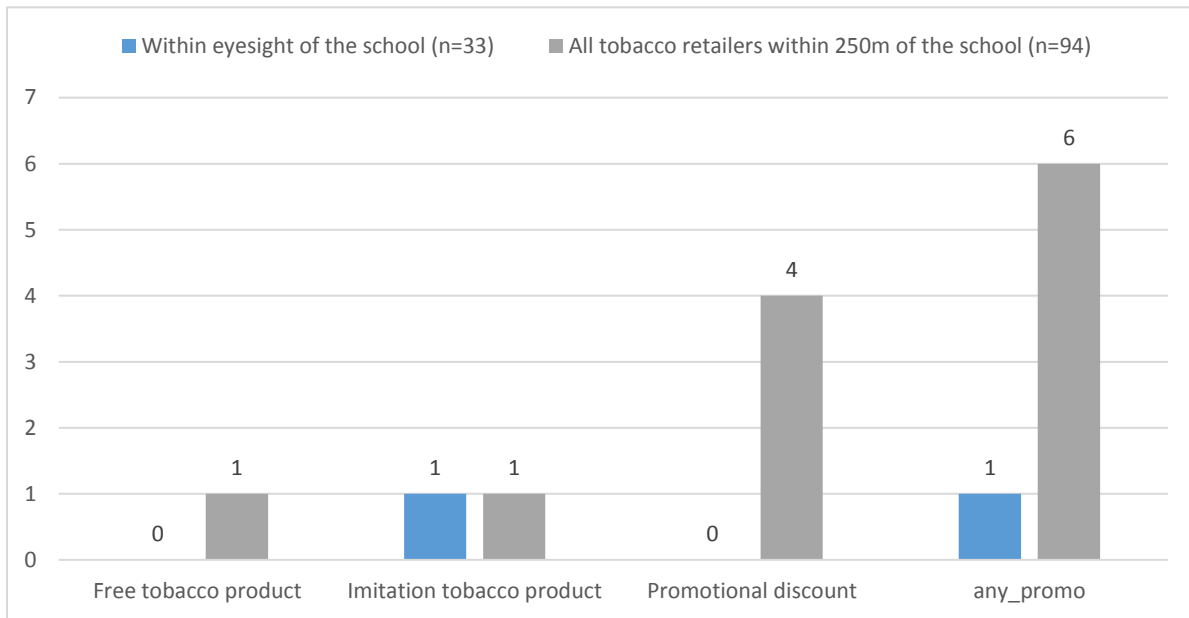

Figure 7. Number of Tobacco Retailers With Visible Health Warning and Age Restrictions
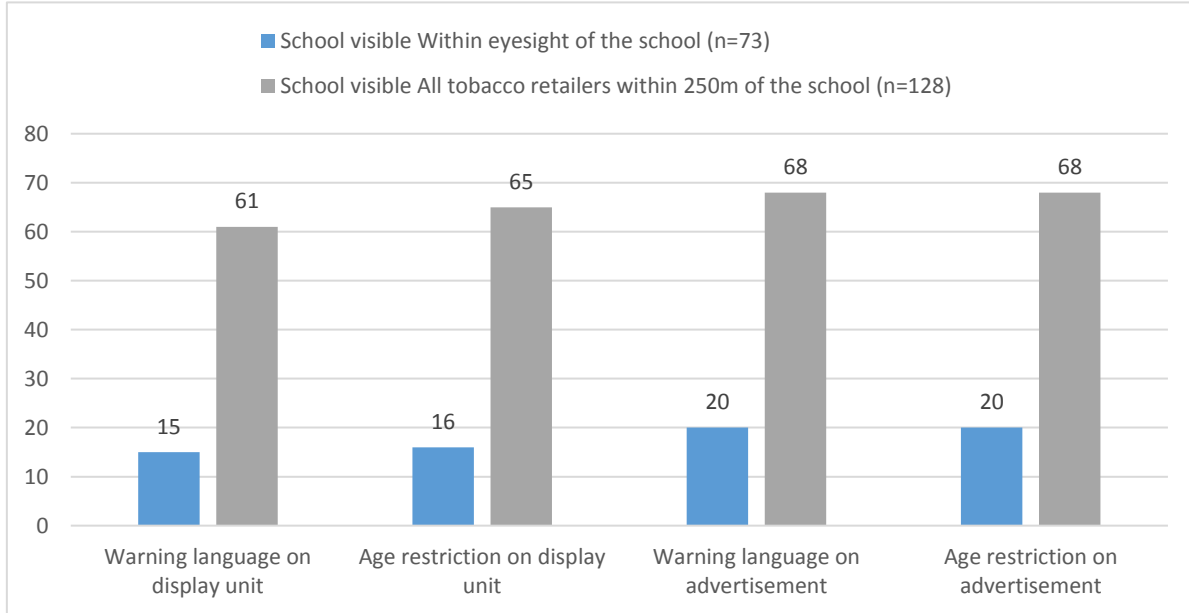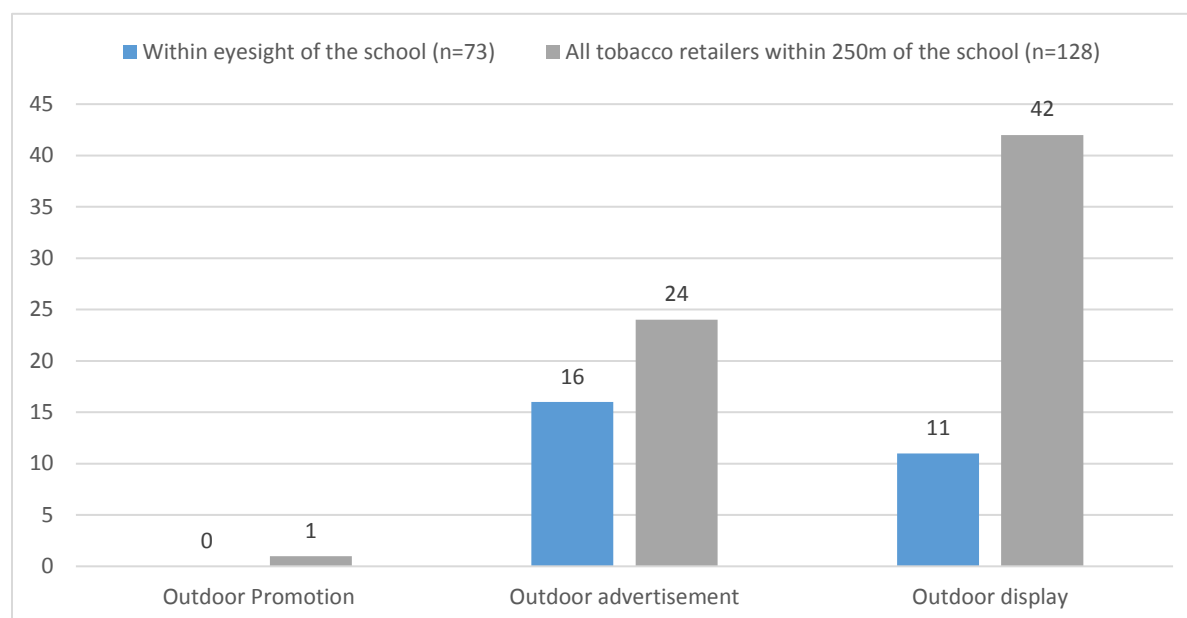
Figure 8. Number of Tobacco Retailers with Tobacco Advertising, Promotions, or Product Displays Visible from Outdoors

Legend: Within eyesight of the school (n=73) | All tobacco retailers within 250m of the school (n=128)

Category	Within eyesight	All within 250m
Outdoor Promotion	0	1
Outdoor advertisement	16	24
Outdoor display	11	42

A total of 50 retailers offered single cigarettes for sale, including 21 that were located within the eyesight of the school.

Figure 9. Tobacco Brands Displayed at the Point-of-Sale

Brands Displayed at the POS	# of Retailers
Peter Stuyvesant	84
Dunhill	67
Pall Mall	66
Rothman's	77
Craven A	56

Discussion

This study identified numerous examples of retailers that sell, display, and advertise tobacco in close proximity to schools and thus are easily accessible by students.

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 South Africa.

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

186, Belvue Primary School, Belhar 4, Cape Town, 7493
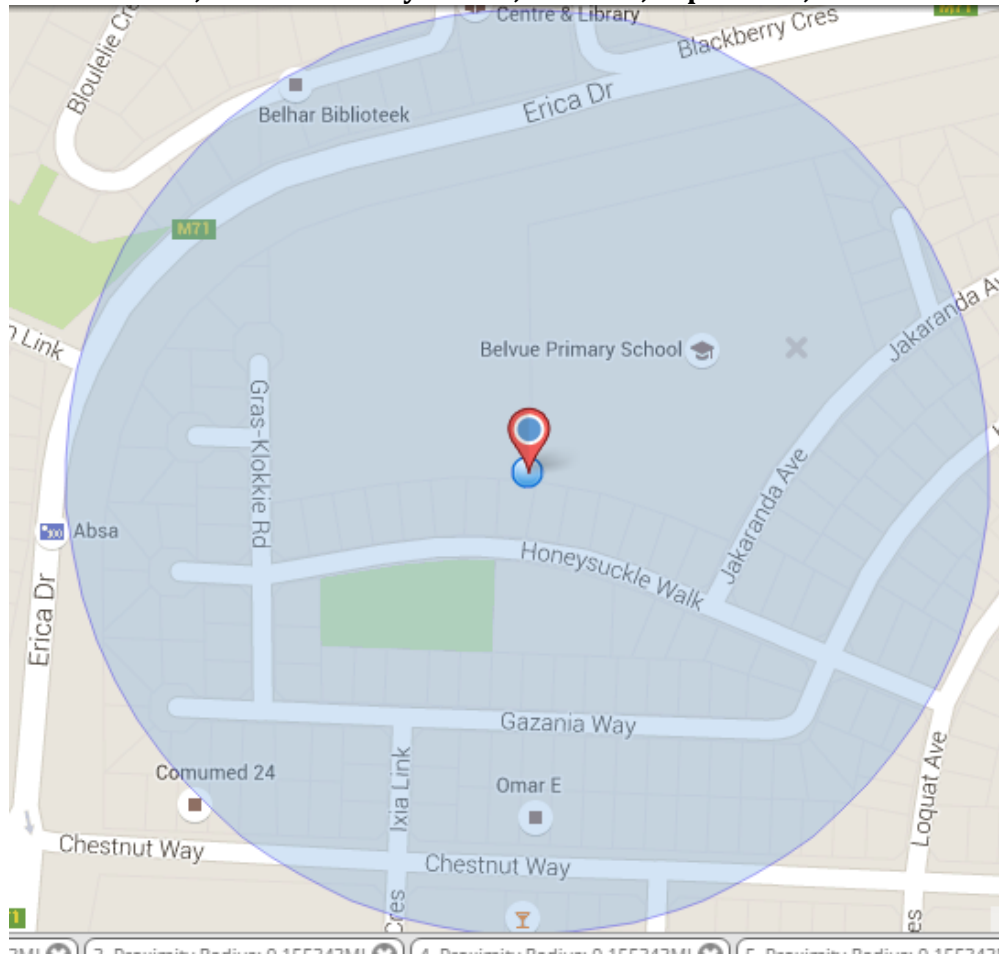
Please record the address of each store you observe. If needed, continue lettering and addresses on next page.

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

References

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