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BLOOMBERG SCHOOL
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Institute for Global Tobacco Control

Technical Report on Tobacco Marketing at the Point-of-Sale in Sarajevo and Mostar, Bosnia and Herzegovina

Product Display, Advertising, and Promotion around Primary and Secondary Schools



Written by:

Ashley Grant, MPH
Caitlin Weiger, BS
Joanna Cohen, PhD

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Institute for Global Tobacco Control
Johns Hopkins Bloomberg School of Public Health
2213 McElderry St., Fourth Floor
Baltimore, MD 21205 USA
www.jhsph.edu/igtc
www.globaltobaccocontrol.org

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For more information, please contact:

igtc@jhu.edu

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

Bosnia and Herzegovina, where 40.7% of adults and 13.3% of youth use tobacco¹⁰, ratified the FCTC in October of 2009¹¹. The "Law on the Limited Use of Tobacco Products" from the Federation of Bosnia and Herzegovina prohibits the advertising of tobacco products through a variety of mediums, including "...on films, panels, labels and other types of advertising, in public places, buildings and...by illuminated signs...and items of clothing, including the sponsorship of sports, cultural and other public events...". The law makes an exception for manufacturers and wholesalers to "inform citizens of the release of a new type of tobacco product onto the market for a maximum of 15 days", and defines a new product as a product with tar content reduced by a minimum of 10%, compared to products that are currently available. The law also prohibits the sale of tobacco products less than 100 meters from a school, prohibits sale to persons under age 15, and prohibits the sale of tobacco not packaged in the original packaging with required health warnings and product information. The law is only applicable to the Federation of Bosnia and Herzegovina, and does not apply to the Republika Srpska, which is a separate legal entity in the country of Bosnia and Herzegovina.¹²

Methods

The following report describes a study about tobacco marketing at the point-of-sale in Sarajevo and Mostar, Bosnia and Herzegovina. The work was led by the Institute for Global Tobacco Control (IGTC) at Johns Hopkins Bloomberg School of Public Health (JHSPH). IGTC partnered with Progressive Reinforcement of Organizations and Individuals (PROI), a public health advocacy organization. PROI provided guidance and context about the sampling framework, and IGTC designed the survey instrument and data collection protocol. Investigators from IGTC trained 9 people, a group including students and professionals from various fields. These data collectors conducted the fieldwork and submitted daily reports for review in real-time. The IGTC study team was in Sarajevo 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 Sarajevo, Bosnia and Herzegovina’s capital with a population of nearly 700,000 people¹³, and the nearby city of Mostar¹⁴, with a population of just over 100,000 people¹⁹. The Ministry of Education provided a list of 141 primary and secondary schools within both cities. All schools were plotted on a map with a 100-meter radius surrounding schools in Sarajevo (where locations were densely clustered), and a 350-meter radius surrounding schools in Mostar. Specific neighborhoods were selected based on (1) retail density, (2) school density; (3) safety, and (4) ease of accessibility for data collectors traversing the city via public transportation. Eighty schools were selected and assigned unique identification codes (74 in Sarajevo and 6 in Mostar). An online mapping and distance software was used to define the sampling area radius of 100 or 350 meters surrounding each school, ensuring that none of the sampling areas overlapped. The study surveyed a convenience sample of supermarkets, convenience stores, small/independent grocers, cafes or bars, tobacco shops, kiosks or newsstands, and outdoor markets within each sampling area that sold tobacco products.

Figure 1. Selected Schools in Sarajevo (n=74)

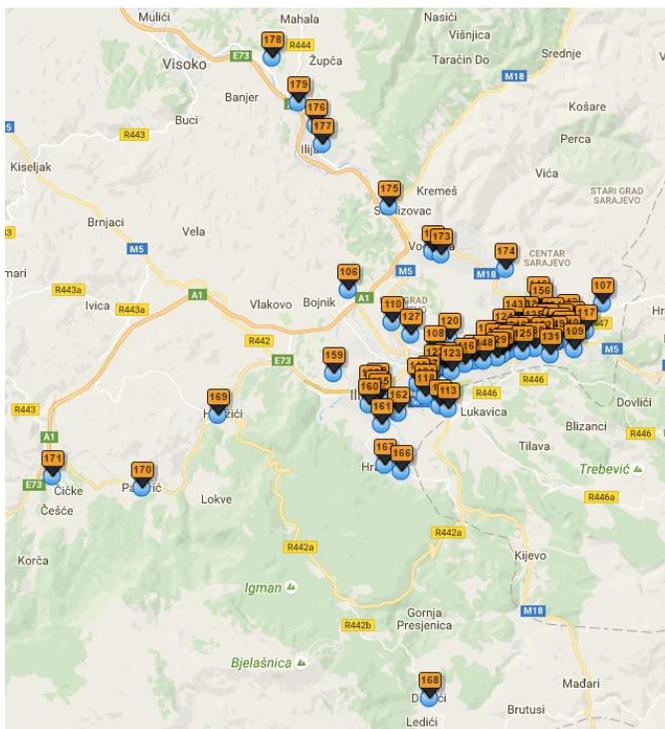
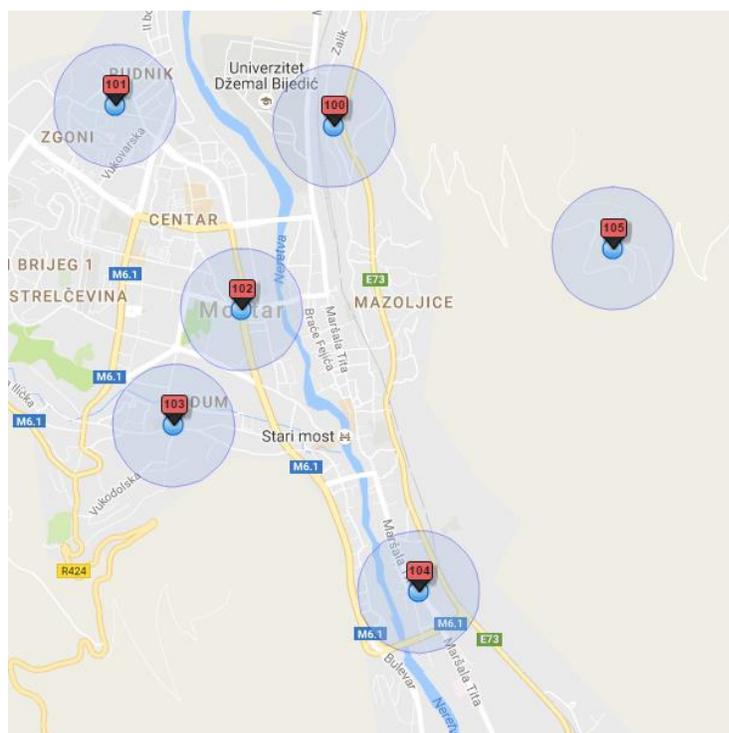


Figure 2. Selected Schools in Mostar (n=6)



Survey Instrument

The survey instrument was designed to address key components of Bosnia and Herzegovina's tobacco control law that allowed or regulated 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 3). 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 3. Survey Instrument Content

Product Display and Placement Characteristics	Advertising	Promotions
In the cashier zone	Signage for tobacco products (posters, banners, flyers, shelf liners, etc.)	Discounts (coupons, sales, vouchers)
Behind the cashier zone	Using lights	Free tobacco product
Hanging above or from the ceiling	Digital signage (video or electronic screen)	Free gift (with or without purchase)
On a branded stand or cabinet	Mention of menthol	Customer products using tobacco branding (e.g. lighters, hat, clothing)
On a power wall of tobacco products	Mention of flavors (not menthol)	Tobacco brand sponsored event or activity
In another location inside the store	Functional products using tobacco branding (e.g. umbrellas, change dish)	Contest or competition
1 meter or less from the floor		Loyalty scheme
Using lights		Imitation tobacco products
Using movement		Presence of brand representative
Packs with menthol		
Packs with flavors (not menthol)		
Packs displayed with toys		
Warning labels visible on ALL displayed packs?		

Data Collection Protocol

Observations and photos were collected from retailers during normal business hours from July 14 – 15, 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-meter radius in Sarajevo or 350-meter radius in Mostar. Data collectors 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.

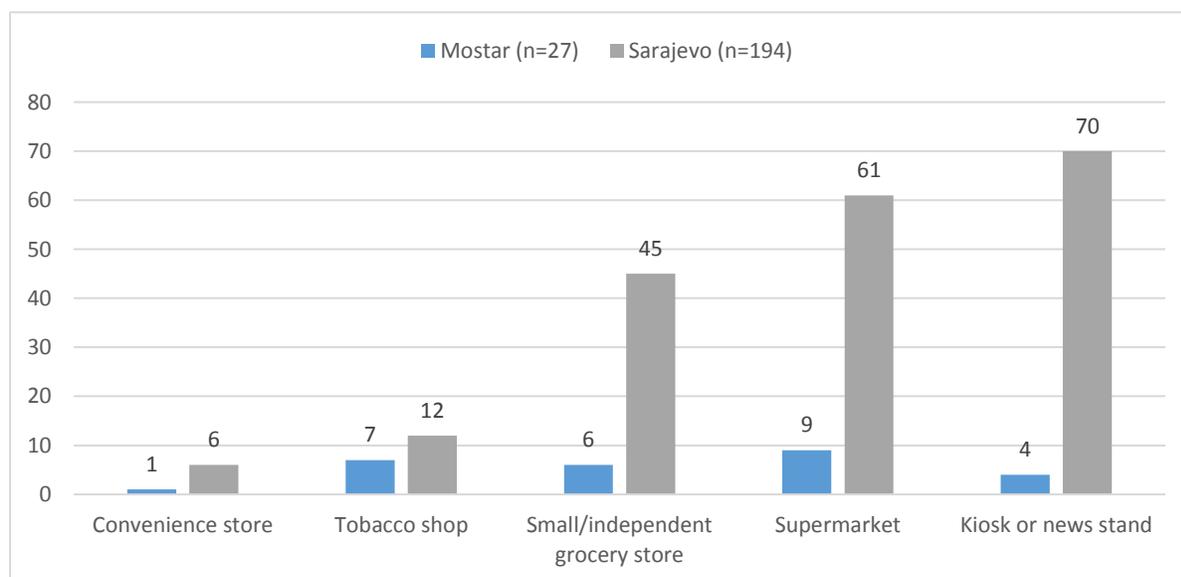
Training

Nine data collectors attended a day and a half of training on the study protocol from July 12-13, 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 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 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

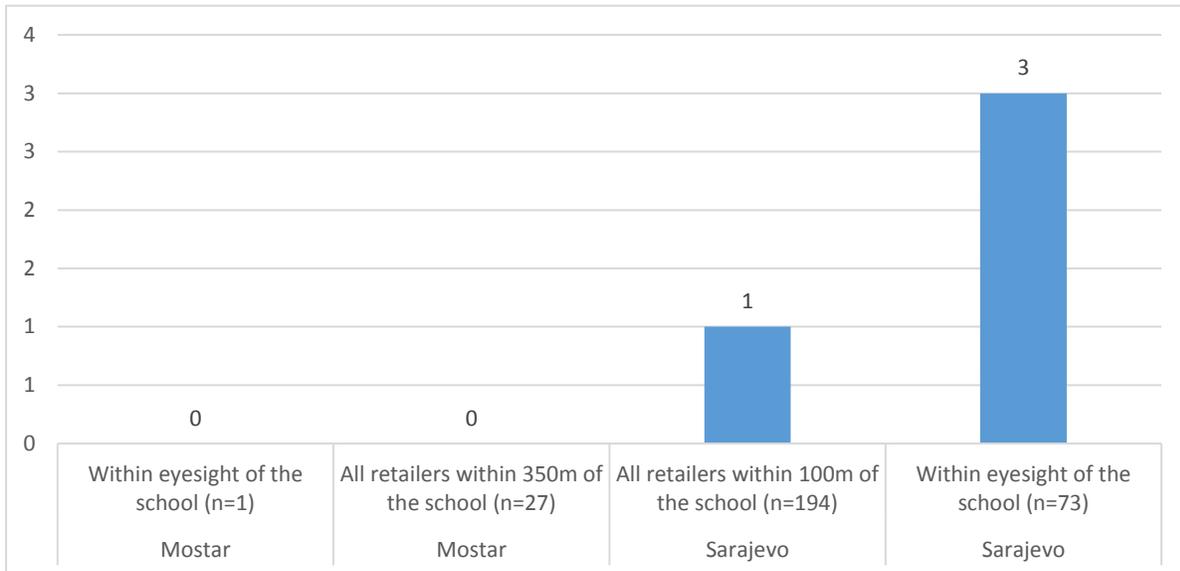
Data collectors observed 69 of the 80 school sampling areas selected (64 in Sarajevo, 5 in Mostar) and identified 239 retailers – 221 of which sold tobacco products (194 in Sarajevo, 27 in Mostar). Seventy-four of these tobacco retailers were located within eyesight of a school (73 in Sarajevo, 1 in Mostar). Retailers that sold tobacco products were identified within all 69 school sampling areas observed. No cafes, bars, or outdoor markets were observed.

Figure 4. Number of Tobacco Retailers Observed by Type And City



Although not currently required by law, only 3 retailers in Sarajevo and 1 retailer in Mostar had health warning labels visible on all displayed packs, and were within eyesight of the school.

Figure 5. Number of Tobacco Retailers with Visible Health Warning Labels on Packs



In Sarajevo, 94% of retailers within eyesight of the school and 96% of all retailers displayed tobacco products at the points of sale. The displays were often placed hanging from the ceiling (54%), in the cashier zone (52%), or behind the cashier zone (49%). Among all retailers, 40% displayed on a branded stand or cabinet, 32% used lights and 30% displayed products on a power wall of tobacco products.

Figure 6. Number of Tobacco Retailers in Sarajevo with Tobacco Product Displays at the Point-of-Sale

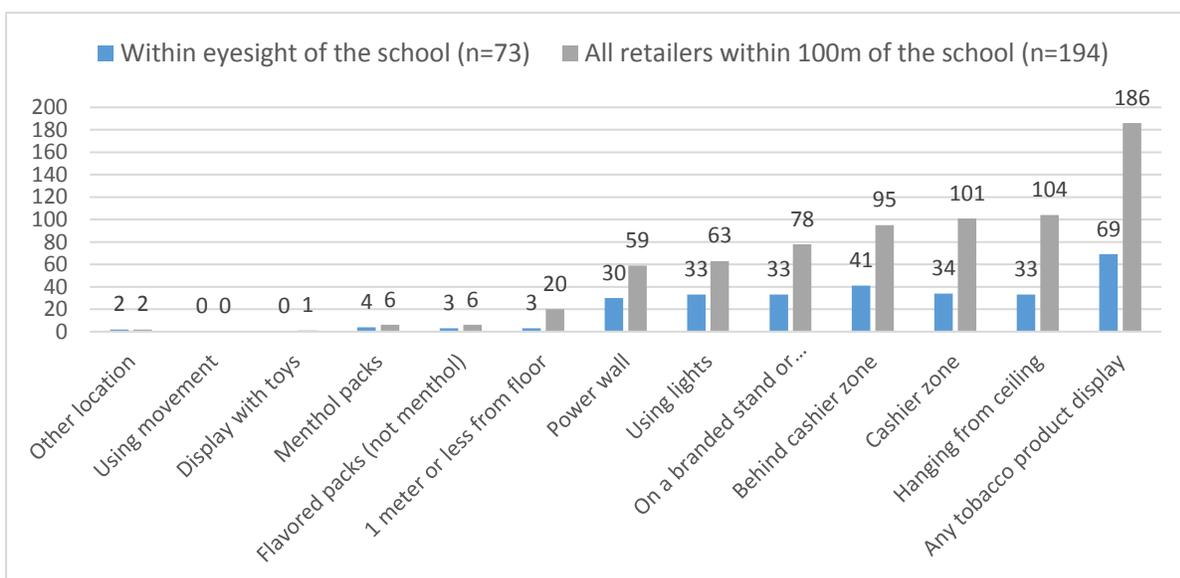
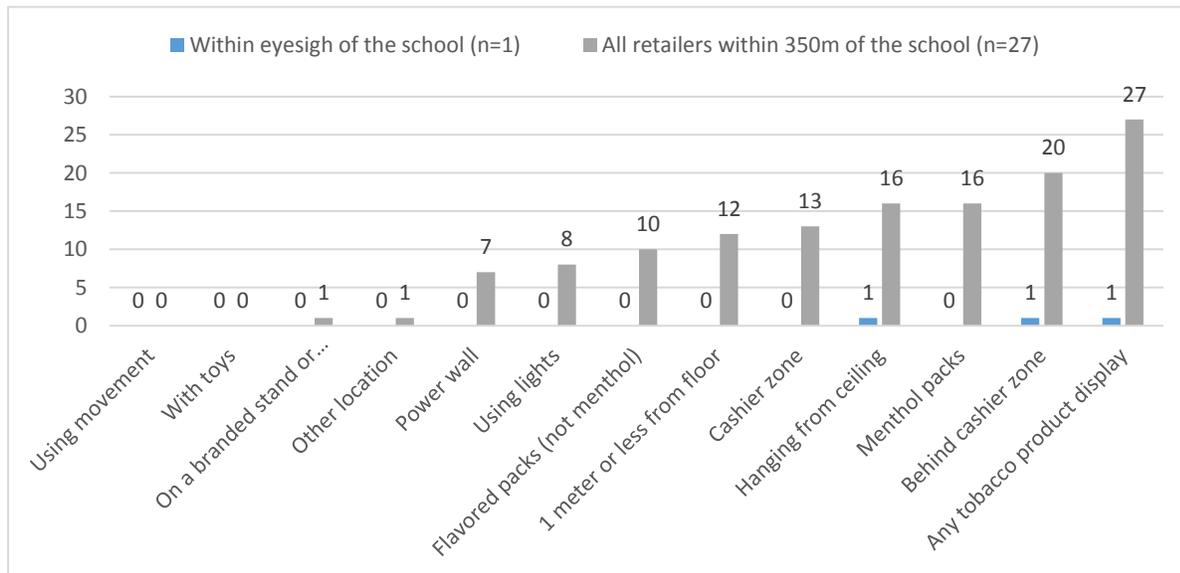


Figure 7. Tobacco Product Display with Advertising Signage Hanging Above the Cashier Zone



In Mostar, 100% of retailers displayed tobacco products, with 74% of stores placing displays behind the cashier zone and 59% of displays including products with menthol.

Figure 8. Number of Tobacco Retailers in Mostar with Tobacco Product Displays at the Point-of-Sale



In Sarajevo, 93% of retailers located within eyesight of the school and 94% of all retailers displayed tobacco near products such as candy, snacks, or soda – usually in the cashier zone.

Figure 9. Number of Tobacco Retailers in Sarajevo with Tobacco Products Displayed Near Sweets, Snacks or Soda

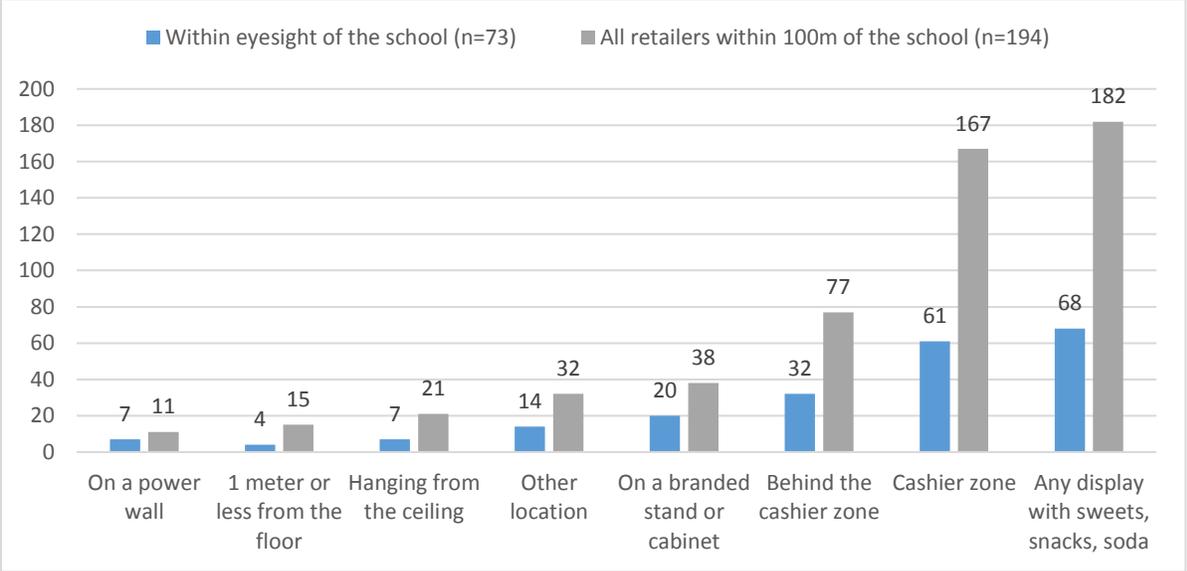
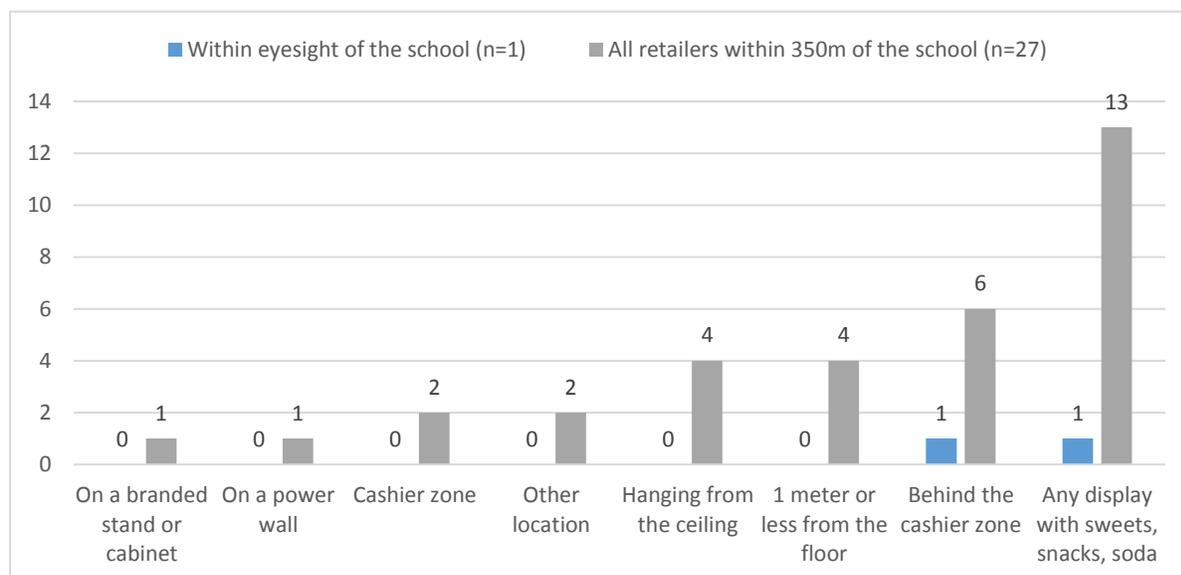


Figure 10. Tobacco Products Displayed with Sweets at the Point-of-Sale



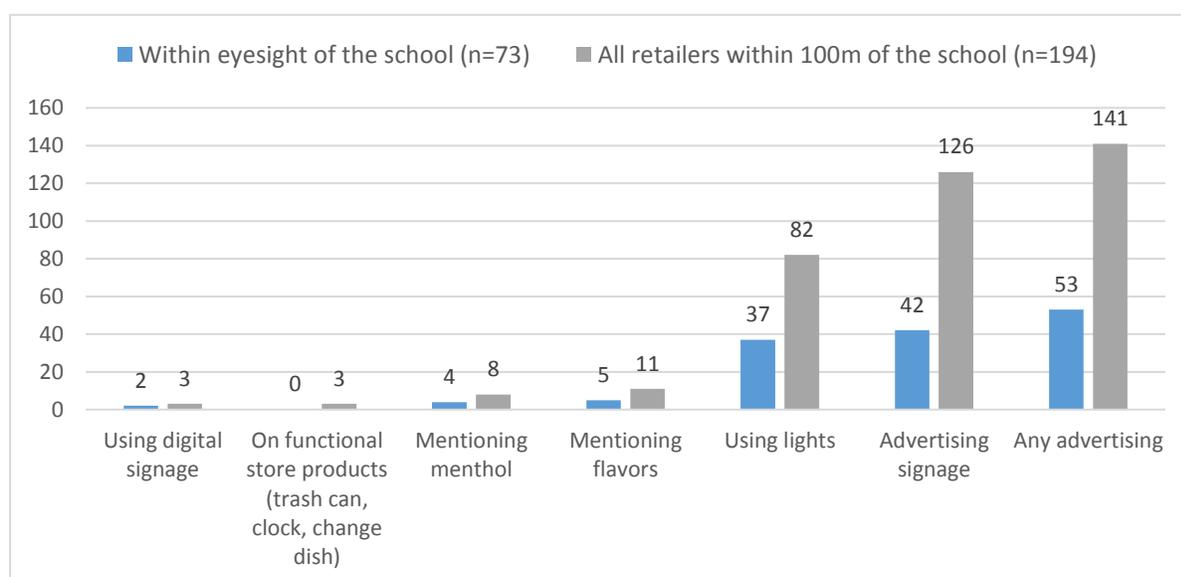
In Mostar, 48% of all retailers displayed tobacco products near sweets, snacks or soda.

Figure 11. Number of Tobacco Retailers in Mostar with Tobacco Products Displayed Near Sweets, Snacks or Soda



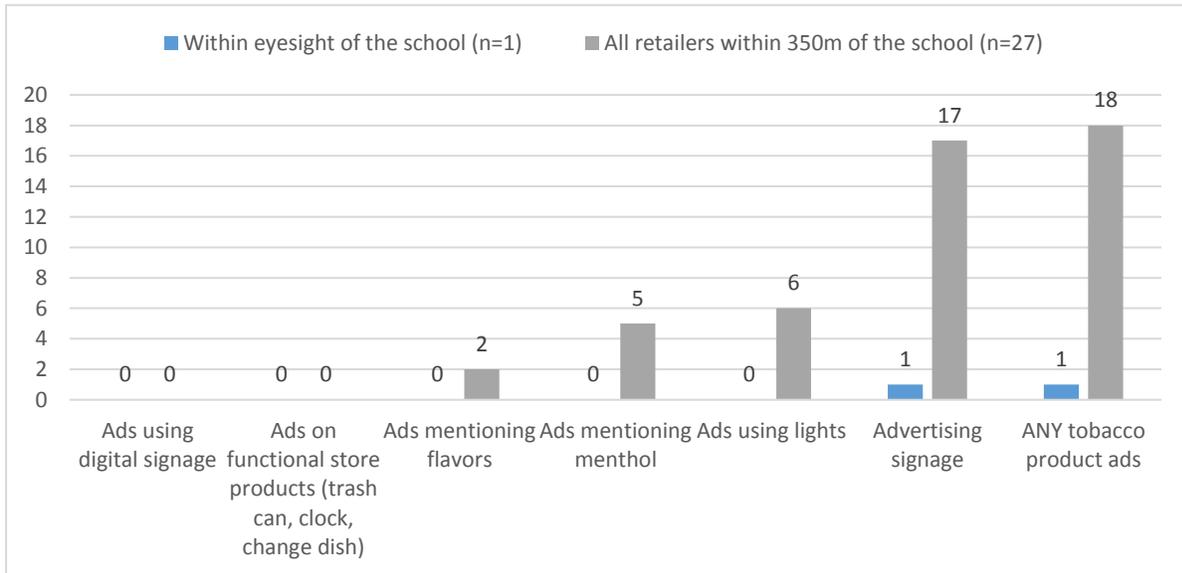
73% of retailers within eyesight of the school and overall included any form of advertising, most frequently through the use of print signage. 51% of retailers within eyesight of the school and 42% of all retailers also used lights to advertise tobacco products.

Figure 12. Number of Tobacco Retailers in Sarajevo with Advertising Signage



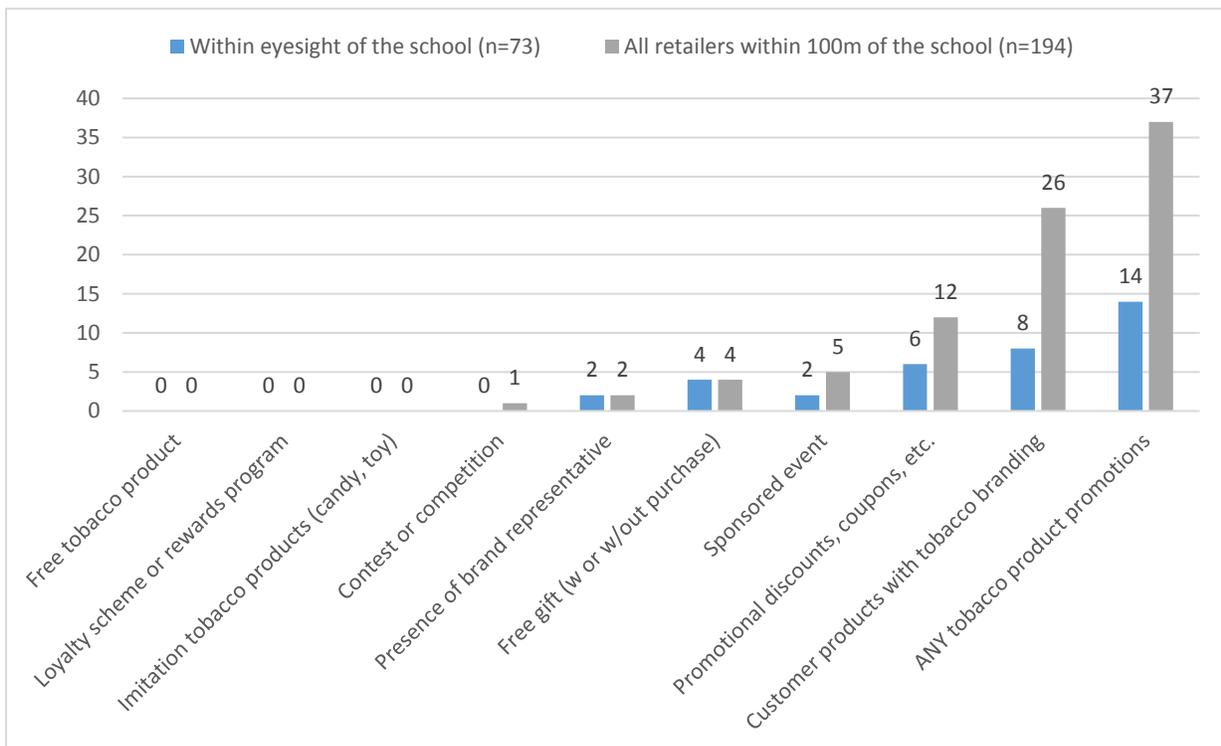
In Mostar, 63% of retailers used advertising signage to market tobacco products

Figure 13. Number of Tobacco Retailers in Mostar with Advertising Signage



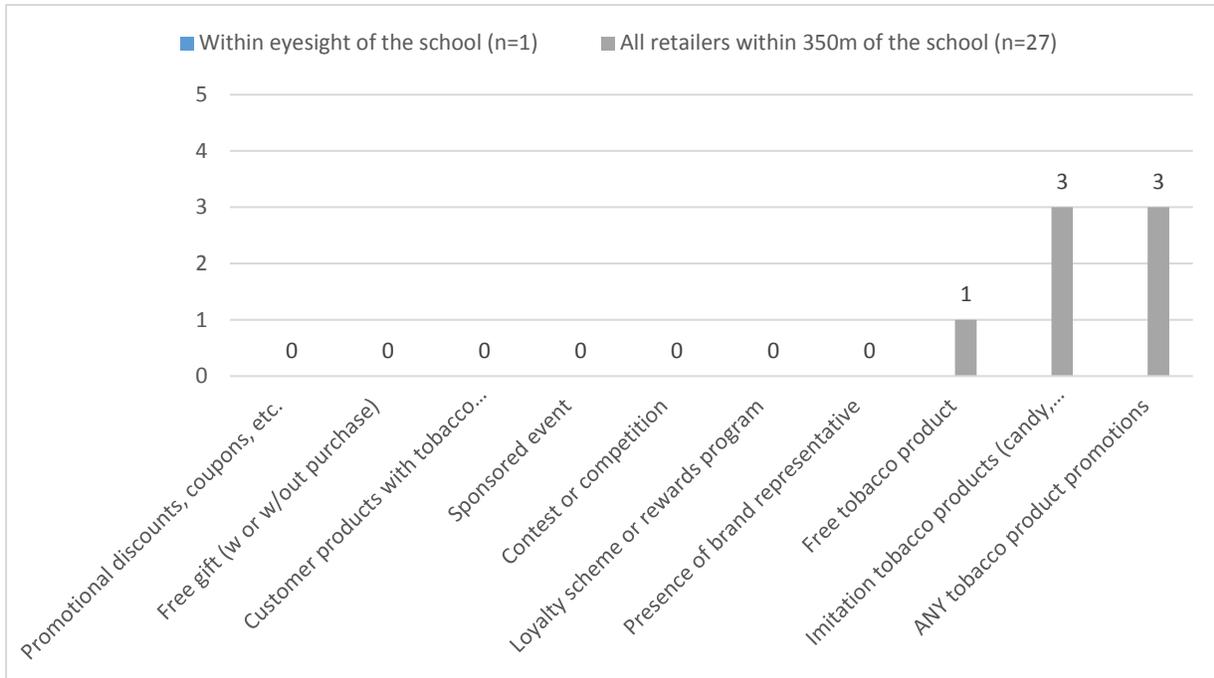
19% of retailers in Sarajevo offered tobacco product promotions at the point-of-sale, such as other products with tobacco branding (13%) and special discounts (6%).

Figure 14. Number of Tobacco Retailers in Sarajevo with Promotion of Tobacco Products



11% of retailers in Mostar offered imitation tobacco products (such as sweets or toys in the shape of cigarettes).

Figure 15. Number of Tobacco Retailers in Mostar with Promotion of Tobacco Products



In Sarajevo, 63% of retailers within eyesight of the school (and 62% overall) used advertising, promotions or product displays that were visible from outside the point-of-sale.

Figure 16. Number of Tobacco Retailers in Sarajevo with Tobacco Advertising, Promotions, or Product Displays Visible from Outdoors

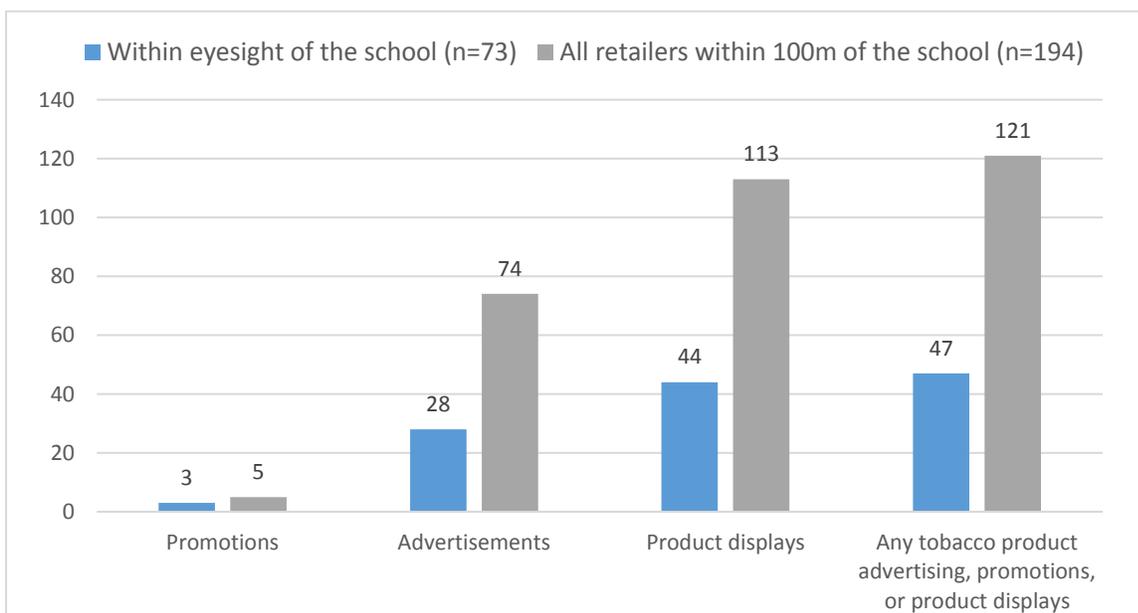
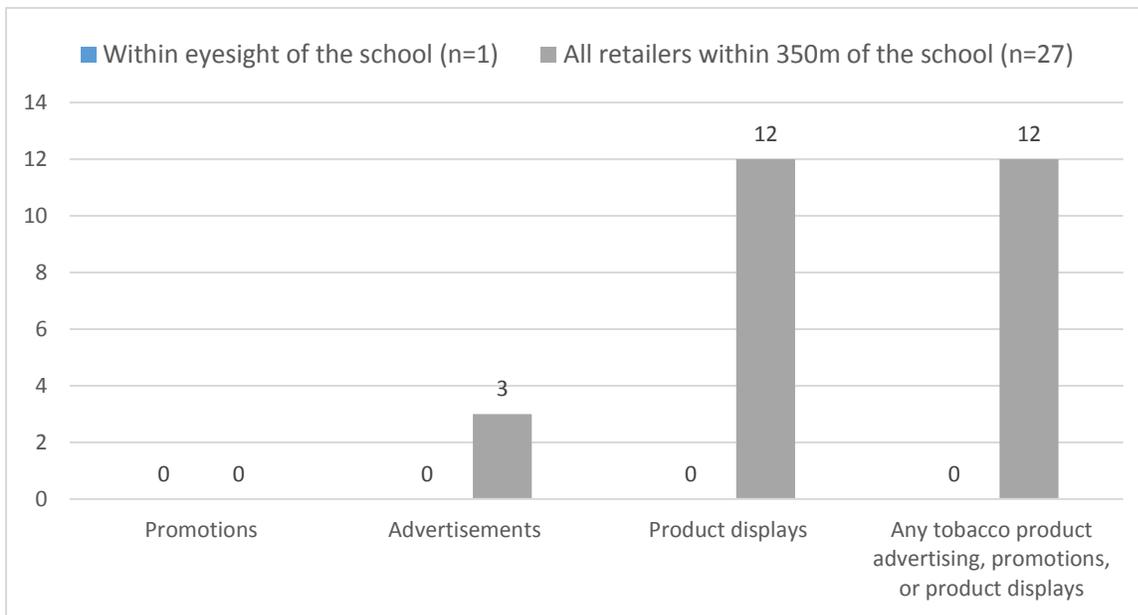


Figure 17. Tobacco Advertising Signage Displayed Outside the Point-of-Sale



47% of retailers in Mostar displayed products that were visible from outside the point-of-sale. 11% used advertisements that were visible from outdoors.

Figure 18. Number of Tobacco Retailers in Mostar with Tobacco Advertising, Promotions, or Product Displays Visible from Outdoors



Marlboro, Aura and Ronhill were the most frequently displayed tobacco brands in Sarajevo. In Mostar, the leading brands on display were Marlboro, Drina and York.

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

	# of Retailers in Sarajevo (n=194)	# of Retailers in Mostar (n=27)
Marlboro	128	24
Aura	125	16
Ronhill	117	22
Drina	105	24
York	101	23
Lucky Stike	82	16
Other brand(s)	68	11

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. In Sarajevo, all observed tobacco retailers were located within 100 meters of a school, which is currently prohibited by law. Nearly all of those retailers displayed tobacco and often placed products in close proximity to sweets, snacks and soda, increasing the chances that they will attract the attention of children. Likewise, use of illuminated displays and advertising signage makes tobacco marketing very visible and appealing to children.

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 Bosnia and Herzegovina.

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 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

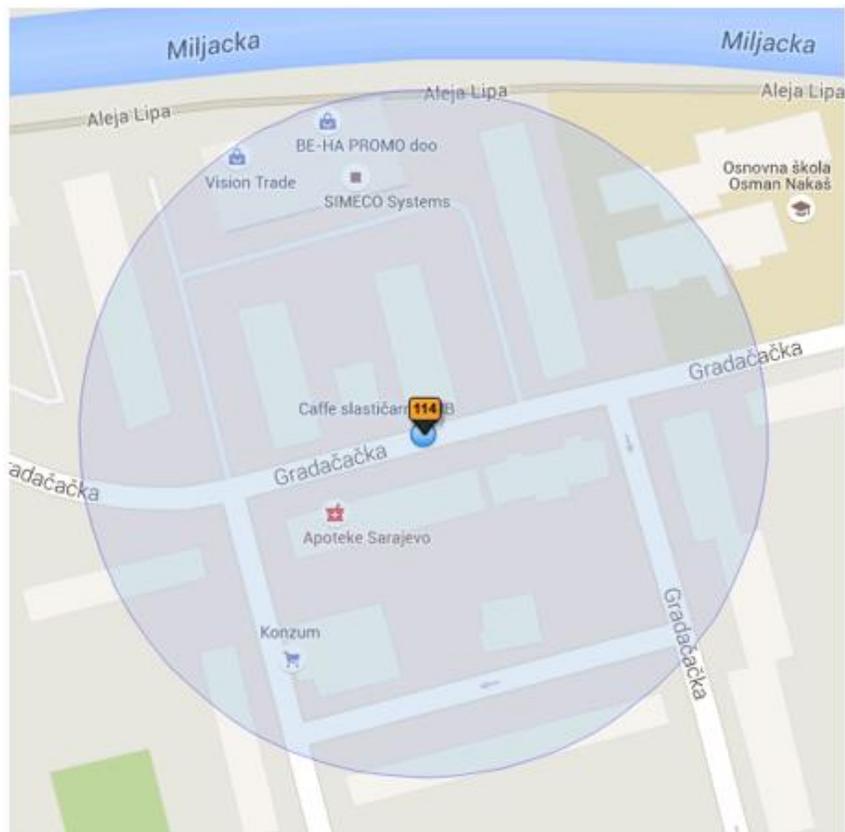
Product display: physical packs of tobacco products that are visible to potential consumers

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

114 OŠ “Osman Nakaš” Gradačacka 39



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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