



## TOBACCO MARKETING THAT REACHES KIDS: POINT-OF-SALE ADVERTISING AND PROMOTIONS

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The tobacco industry spends \$9.4 billion a year to market its products throughout the United States, and 96 percent (\$9 billion) of that is spent at the point of sale (POS).<sup>1</sup> POS advertising and promotions refer to a variety of marketing practices, including signs on the interior and exterior of retail stores, functional items like counter mats and change cups, shelving displays, and coupons and other price discounts that reduce the price for the consumer. POS advertising also includes promotional payments to retailers by tobacco companies to have their products placed in specific store locations, making it more likely that consumers will see them.

POS advertising and promotions are effective because they target and attract shoppers at the exact place and time when they can buy a specific product. When it comes to kids, the tobacco industry's marketing has been found to impact not only what products and brands kids use, but also the chances that kids will start smoking.<sup>2\*</sup>

### **Tobacco Company POS Discounts and Promotional Efforts**

Tobacco companies spend the vast majority of their total marketing expenditures (95%) on price-related strategies at the POS. These strategies work to keep tobacco prices low through price discounts, promotional allowances, and “retail value added” offers like buy-downs (payments to retailers that reduce the price to consumers) and multi-pack discounts (e.g., buy two packs get one free). They also include coupons and free gifts with cigarette or smokeless tobacco purchases.

- In 2017, price discounts for cigarettes (e.g., off-invoice discounts, buy downs and voluntary price reductions to reduce the price of cigarettes to consumers) totaled nearly \$7.4 billion, accounting for over 85 percent of total cigarette company marketing expenditures and making it by far the largest marketing expense category. Cigarette companies spent an additional \$302 million on coupons in 2017.<sup>3</sup>
- Smokeless tobacco companies spent \$439 million (61% of all marketing expenditures) on price discounts in 2017. As with cigarettes, price discounts for smokeless products were the largest expense category. Smokeless tobacco companies spent an additional \$76.9 million on coupons in 2017, an increase of 37% from 2016. Smokeless tobacco companies reported spending \$4.5 million on retail value added offers in 2017.<sup>4</sup>

A national study of POS marketing found that more than 80 percent of convenience stores and more than half of supermarkets have special price promotions advertised inside; 42 percent of convenience stores have exterior price promotions.<sup>5</sup> Across all store types, 40 percent have special price promotions for Camel cigarettes advertised inside, 24 percent have price promotions for Marlboro, and 23 percent have price promotions for Newport.<sup>6</sup> These three brands also happen to be preferred by eight out of ten youth smokers—a fact which should come as no surprise, since the U.S. Surgeon General has stated that youth are sensitive to tobacco industry price promotions.<sup>7</sup>

In 2012, the U.S. Surgeon General reported that, “...the industry’s extensive use of price-reducing promotions has led to higher rates of tobacco use among young people than would have occurred in the absence of these promotions.”<sup>8</sup> This conclusion expands upon the 1994 U.S. Surgeon General’s report, which found that the use of value-added or coupon promotions makes cigarettes more affordable to kids

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\* The point-of-purchase tobacco marketing landscape changed significantly due to provisions of the Family Smoking Prevention and Tobacco Control Act that went into effect on June 22, 2010 or before. For example, the law eliminated the preexisting Federal Cigarette Labeling and Advertising Act’s preemption of any state or local government restrictions on the time, place and manner of cigarette advertising done for smoking and health purposes; but First Amendment constraints to government restrictions on tobacco product ads still apply.

and those with less financial resources. That same report also states that coupons affect new users by encouraging them to smoke more, moving from the trial stage to being a regular smoker.<sup>9</sup>

Tobacco industry promotional efforts at the POS also include company payments to retailers to place a company's products and ads in specific store locations that make them more visible to customers, including kids. In 2017, cigarette companies spent \$563 million (6.5% of total advertising expenditures) on promotional allowances; smokeless tobacco companies spent more than \$78 million (10.8% of total advertising expenditures).<sup>10</sup>

Tobacco companies know that that "eye level is buy level,"<sup>11</sup> so they pay retailers large sums of money to put their tobacco products on 'good' shelving space (slotting allowances). Displaying multiple shelves of cigarettes is also often done to create a "powerwall" of branded imagery that makes tobacco products more visible, more attractive and more enticing.<sup>12</sup>

A 1999 study of retail outlets in Santa Clara County, California, found that 62.4 percent of stores had received slotting/display allowances from tobacco makers. This is higher than allowances received for candy, snack foods and soft drinks. These incentives motivate retailers to display, promote and advertise tobacco products.<sup>13</sup>

### **Tobacco Company POS Advertising**

Much of the more visible tobacco company advertising at the POS consists of cigarette and spit tobacco ads, signs, shelving displays, and functional items (such as counter mats, open/closed signs and change cups) located inside, outside and on the property of convenience stores, drug stores, gas stations and other retail sales outlets.<sup>14</sup> These materials are provided by the tobacco companies and are often coordinated with current advertising campaigns to promote the images and appeal of specific tobacco products.

In 2017, cigarette companies spent \$48.5 million on POS advertising materials. In addition, smokeless tobacco companies spent \$24.3 million—a 17 percent increase from 2006, the year the largest cigarette companies entered the smokeless tobacco market. The cigarette companies also spent \$36 million on consumer engagement efforts in retail stores.<sup>15</sup>

As a result of this spending, tobacco company marketing at the POS is pervasive. A national study of POS marketing published in 2014 found that almost all tobacco retailers (96%) had at least one tobacco marketing material, with an average of nearly 30 marketing materials per store. About one in ten tobacco retail stores displayed tobacco products at heights of less than three feet, and 10 percent of stores displayed them within 12 inches of candy.<sup>16</sup> State and city-specific studies have documented the ubiquity of tobacco company marketing in their communities.

- A 2011 survey of retail outlets in California found that, on average, stores contain 20 pieces of tobacco marketing materials, including advertisements, brand displays, functional items and shelving units. Nearly half of convenience stores (47%) had at least one tobacco ad at young kids' eye level (three feet or lower) and one in ten convenience stores placed tobacco advertisements near candy.<sup>17</sup>
- A 2013 report of retail tobacco advertising in Philadelphia found that 75 percent of retailers—including corner stores, supermarkets, pharmacies and gas stations—had indoor and/or outdoor ads for tobacco products. 29 percent of retailers with indoor tobacco ads displayed one or more of them in close proximity to products targeted toward children, such as chips and candy.<sup>18</sup>
- A 2013 survey of retail tobacco marketing based on a convenience sample of 45 stores in select New York City neighborhoods found a total of 345 interior and exterior tobacco advertisements within a three to six block radius around three high schools.<sup>19</sup>
- A 2006 study of stores in Hawaii found more than 3,000 cigarette advertisements in just 184 stores, with nearly one-third of those stores being within 1,000 feet of a school.<sup>20</sup>

The pervasiveness of tobacco company marketing at the POS becomes even more significant when one considers the high number of tobacco retailers. There are an estimated 375,000 tobacco retailers in the

U.S. (more than the number of Starbucks or McDonald's), and the majority of them are convenience stores.<sup>21</sup> This adds up to a massive amount of tobacco advertising and marketing at the POS. With nearly half of adolescents visiting a convenience store at least once a week,<sup>22</sup> the chance of a kid being repeatedly and regularly exposed to tobacco company marketing is high.

Data from the National Youth Tobacco Survey show that 81.5 percent of middle school students and 86.9 percent of high school students were exposed to tobacco advertisements in stores in 2011. Middle school students who reported seeing tobacco advertising in stores were more likely to be susceptible to trying cigarettes than their peers who did not see such advertising.<sup>23</sup> Tobacco retailer density has also been linked to greater youth initiation of tobacco use.<sup>24</sup>

### **Tobacco Company POS Advertising and Promotions Target Kids**

As noted above, POS advertising and promotions are particularly effective because they target consumers at the place where they can immediately buy the product.<sup>25</sup> In addition to normalizing the presence of tobacco products in everyday life, tobacco company advertising at the POS encourages youth initiation and discourages cessation.<sup>26</sup> In fact, the U.S. Surgeon General concluded in 2012 that the advertising and promotional efforts of the tobacco companies—including price-reducing promotions—cause the initiation and progression of tobacco use among youth.<sup>27</sup>

The Surgeon General's 2012 conclusion was supported by a vast number of studies that document the especially powerful impact of the tobacco industry's POS advertising on kids, and it continues to be supported by new research documenting the industry's targeted marketing to kids.

- A 2015 study, using data from the 2012 National Youth Tobacco Survey, concluded that exposure to tobacco coupons may encourage youth smoking and hinder cessation. Receipt of tobacco coupons was associated with a higher likelihood of being susceptible to cigarette smoking among non-smoking youth, a lower likelihood of feeling confident about quitting among youth smokers, and a higher likelihood of intention to purchase cigarettes among youth smokers and experimenters.<sup>28</sup>
- The 2011 California Tobacco Advertising Survey found that there were more marketing materials per retail store for Marlboro than for Camel and Newport, which is consistent with the relative market share of these brands and youth smokers' preference for them.<sup>29</sup> Similarly, a 2004 study in *Tobacco Control* found more than three times as many marketing materials and two times more shelf space for Marlboro, Camel and Newport in stores that were popular among adolescents. In addition, stores that teens shop at the most contained more point-of-purchase advertising than stores less frequented by teens, and there were three times more cigarette ads on windows of stores popular among adolescents than stores that were not as popular.<sup>30</sup>
- A 2009 comprehensive review of the evidence on POS promotions found a significant association between exposure to POS marketing and displays and smoking initiation, susceptibility to smoking, beliefs about the availability of tobacco and beliefs about smoking prevalence, among youth.<sup>31</sup>
- A 2009 study in *Tobacco Control* found that more frequent visits to stores selling tobacco and greater awareness of cigarettes sold in stores increased the likelihood of teenagers being susceptible to initiating, experimenting or becoming current smokers.<sup>32</sup> Likewise, a 2010 longitudinal study in *Pediatrics* found that more visits to stores per week increased the odds of teens initiating smoking, even over time. In fact, the study found that the odds of initiation more than doubled for teens who visited a store with POS tobacco ads at least twice a week.<sup>33</sup>
- Research shows that there is more store advertising for menthol cigarettes and a greater availability of price promotions for menthol brands near California high schools with more black students, meaning tobacco products, like Newport, are both more visible and more affordable to kids.<sup>34</sup> Newport is the leading brand of cigarettes among African American youth ages 12-17.<sup>35</sup>
- A 2008 study in *Preventive Medicine* found that current smoking was 3.2 percentage points higher at schools in neighborhoods with more than five tobacco-selling retailers than the smoking rate at schools in neighborhoods without any tobacco-selling retailers.<sup>36</sup>

- A 2007 study from the *Archives of Pediatrics and Adolescent Medicine* found that POS cigarette advertising increased the likelihood that youth would initiate smoking; that pricing strategies contributed to increases all along the smoking continuum, from initiation and experimentation to regular smoking; and that cigarette promotions increased the likelihood that youth will move from experimentation to regular smoking. According to the researchers, reducing or eliminating these retail marketing practices would significantly reduce youth smoking.<sup>37</sup>
- A 2004 study of 6<sup>th</sup>, 7<sup>th</sup> and 8<sup>th</sup> graders concluded that students who visited a convenience, liquor or small grocery store at least weekly, and who therefore were more exposed to retail tobacco marketing, had 50 percent greater odds of ever smoking. This effect is approximately the equivalent to the effect a smoking parent or household member has over youth ever smoking.<sup>38</sup>
- POS advertising and displays have been found to increase average tobacco sales by 12 percent.<sup>39</sup>
- A 2002 study in *Tobacco Control* comparing photographs of stores with no tobacco advertising and stores with advertising found students perceived easier access to tobacco products at the stores with tobacco advertising.<sup>40</sup>
- Studies from Australia indicate that POS cigarette displays act as a form of advertising and provide cues to smoke. A 2006 study found that “the presence of cigarette displays at the POS, even in the absence of cigarette advertising, has adverse effects on students’ perceptions about ease of access to cigarettes and brand recall, both factors that increase the risk of taking up smoking.”<sup>41</sup> A 2008 study found that cigarette pack displays stimulate impulse purchases among smokers and that those who are trying to avoid smoking commonly experience urges to purchase cigarettes when confronted with these displays, suggesting that cigarette pack displays at the POS may undermine intentions to quit among established smokers.<sup>42</sup> Similarly, a 2009 study based on interviews with persons having just bought cigarettes at retail outlets with POS displays found that more than one out of five of the purchases were unplanned.<sup>43</sup>
- A 1999 study in the *U.S. Distribution Journal* found that teens are more likely than adults to be influenced by promotional pieces in convenience stores (73% to 47%).<sup>44</sup> The same study also found that more than half of all teenagers say they are influenced by in-store displays; 47 percent are influenced by banner/window signs; and 44 percent are influenced by in-store promotional signage.<sup>45</sup>
- A study published in the *Journal of Health Communications* determined that high school smokers’ choice of Marlboro as their usual brand was associated with more Marlboro interior and exterior advertising in local convenience stores. There was a 33 percent increase in the odds of choosing Marlboro as a usual brand with each percentage increase in brand share of interior advertising and 27 percent greater odds with each percentage increase in brand share of exterior advertising.<sup>46</sup>

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**Additional Campaign Factsheets on Tobacco Company Marketing to Kids are available at <https://www.tobaccofreekids.org/fact-sheets/tobacco-industry-activities/tobacco-marketing-to-kids>.**

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<sup>1</sup> U.S. Federal Trade Commission (FTC), *Cigarette Report for 2017, 2019*, [https://www.ftc.gov/system/files/documents/reports/federal-trade-commission-cigarette-report-2017-federal-trade-commission-smokeless-tobacco-report/ftc\\_cigarette\\_report\\_2017.pdf](https://www.ftc.gov/system/files/documents/reports/federal-trade-commission-cigarette-report-2017-federal-trade-commission-smokeless-tobacco-report/ftc_cigarette_report_2017.pdf) [data for top 5 manufacturers only].; FTC, *Smokeless Tobacco Report for 2017, 2019*, [https://www.ftc.gov/system/files/documents/reports/federal-trade-commission-cigarette-report-2017-federal-trade-commission-smokeless-tobacco-report/ftc\\_smokeless\\_tobacco\\_report\\_2017.pdf](https://www.ftc.gov/system/files/documents/reports/federal-trade-commission-cigarette-report-2017-federal-trade-commission-smokeless-tobacco-report/ftc_smokeless_tobacco_report_2017.pdf). [Data for top 5 manufacturers only].

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<sup>3</sup> FTC, *Cigarette Report for 2017, 2019* [Data for top 5 manufacturers only].

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<sup>5</sup> Center for Public Health Systems Science. *Point-of-Sale Report to the Nation: The Tobacco Retail and Policy Landscape*, 2014.

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