

# The retail environment for tobacco: a barometer of progress towards the endgame

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This e-issue is the first devoted to the retail environment for tobacco products. It features research about regulating the consumer environment (packaging, labelling, and marketing) and the built environment (the quantity, type and location of retailers). The contents include studies from Australia, Canada, France, Greece, India, Lebanon, Mexico, New Zealand, Scotland, Switzerland, UK and USA—countries in which the consumer environment for tobacco differs markedly. In the USA, for example, stores that sell tobacco contain an average of 26 tobacco marketing materials (including branded signs and shelving units), and most advertise at least one discount, such as a special price for a multipack purchase.<sup>1</sup> Conspicuously located near the cash register, a typical powerwall contains an average of 124 cigarette pack facings<sup>2</sup> and makes a colourful display of deadly products with some of the world's smallest, weakest warning statements on the least visible (side) panel. Antitobacco signage, if any, is limited to age-of-sale warnings, some of which were created by the industry to promote corporate image.<sup>2,3</sup>

In many other countries, regulation of the consumer environment for tobacco indicates substantially more progress towards the endgame.<sup>4-6</sup> Approximately one-third of countries ban tobacco advertising at the point of sale, and 15 of these ban retail displays, as well.<sup>7</sup> Almost 40% of all countries have adopted pictorial warnings on packaging. In Australia, plain packaging has displaced the tobacco industry's use of colour to cue consumers about brand, flavour, strength, and relative harm of tobacco products,<sup>8</sup> and several other countries are pursuing this new standard.<sup>9</sup>

While the consumer environment illustrates considerable variation in marketing regulations from country to country, the built environment for tobacco indicates too little progress towards regulation everywhere. Tobacco retailers are

ubiquitous in every country, and policies to restrict their quantity, type, and location could hasten the endgame.

## REGULATING THE CONSUMER ENVIRONMENT

### Packaging and labelling

Australia's implementation of plain packaging and the potential synergy with pictorial warnings is an important focus of this issue. Evidence from retail audits refutes the industry's claims that plain packaging harms retail businesses by increasing time to retrieve packs<sup>10</sup> and by increasing the availability of illicit tobacco at the point of sale.<sup>11</sup> Another study highlights concerns about industry-funded research that misused smoking prevalence data to conclude that plain packaging did not reduce smoking.<sup>9</sup>

Two studies describe the industry's use of colours, colour terms and pack size to microsegment the consumer market before and after plain packaging, highlighting important considerations for future regulation.<sup>12,13</sup> In addition, a study with users of roll-your-own tobacco suggests that the impact of plain packaging on brand attachment and user satisfaction could extend to tobacco products other than factory-made cigarettes.<sup>14</sup> In a message-testing experiment with US young-adult smokers, plain packaging enhances the impact of graphic imagery when combined with gain-framed messages about the benefits of quitting.<sup>15</sup>

Several studies address the relative impact of warning labels that do not meet minimum international standards,<sup>16-18</sup> and make recommendations for novel content and locations for warning statements.<sup>19,20</sup> In a multicountry survey, pictorial warnings improve smokers' awareness of quitlines and cessation websites, moreso when the information appeared on both the front and back panels.<sup>18</sup> This issue includes the first pictorial warning about the economic impact of smoking which tested well with adolescents and young adults in Lebanon,<sup>19</sup> and would likely resonate with other target audiences, particularly low-income smokers. In addition, a pilot study finds that warnings printed on cigarette sticks

increase smokers' intention to quit,<sup>20</sup> which suggests new potential for reinforcing effects of on-pack warnings with novel, on-product messages.

## Retail displays and advertising

Three studies examine the efficacy of display bans or smokers' support for such policies. In Western Australia, a display ban reduces the proportion of smokers who reported making an unplanned purchase.<sup>21</sup> A majority of smokers in New Zealand favour a display ban prior to implementation, and support increased to 80% after 1 year from implementation.<sup>22</sup> In three annual surveys, a majority of smokers in New York City do not favour a tobacco display ban,<sup>23</sup> which illustrates a need for research about how to frame the benefits of a display ban in contexts where retail tobacco advertising persists.

## REGULATING THE BUILT ENVIRONMENT

Comparatively few studies in this e-issue address policies to limit the quantity, type or location of tobacco retailers.<sup>23-27</sup> A geospatial study about illegal sales to minors in Washington DC<sup>25</sup> contributes to a growing body of evidence that proximity of tobacco retailers to schools affects youth access.<sup>28,29</sup> In addition, poor adherence to a ban on tobacco sales near schools is documented in Mumbai, and exposure to retail tobacco marketing is a risk factor for tobacco use by students.<sup>27</sup> In the absence of comprehensive marketing restrictions, regulating the number, type and location of tobacco retailers could minimise the impact of retail marketing on initiation, cessation and relapse.<sup>30,31</sup> However, a majority of New York City adults favour only three of six proposals to regulate the built environment: limiting the number of retailers allowed to sell tobacco, prohibiting tobacco sales in pharmacies and at stores located near schools.<sup>23</sup>

Studies from New Zealand consider other policy solutions, such as regulating the source of duty-free tobacco sales,<sup>26</sup> and compare the likely impact of eliminating sales within 1 or 2 km of schools, restricting sales to half of the liquor stores, and reducing the number of tobacco retailers by 95%.<sup>24</sup> Future research should evaluate existing retailer reduction strategies, such as policies in Hungary<sup>32</sup> and San Francisco,<sup>33</sup> as well as use agent-based modelling and other simulations to predict the impact of regulating the built environment on initiation, cessation and tobacco use disparities.

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## REGULATING THE RETAIL ENVIRONMENT FOR VAPOUR PRODUCTS

With few exceptions, this issue focuses on combustible cigarettes. The prevalence of advertising for electronic cigarettes in a predominantly African-American neighbourhood of New York City<sup>34</sup> highlights growing concerns that industry marketing strategies for these products mimic the promotion of menthol cigarettes and other flavoured tobacco products.<sup>35</sup> In addition, a demonstration study finds that crowdsourcing and in-store photographs are useful to assess reliably the availability and advertising of e-cigarettes at the point of sale.<sup>36</sup> In many countries, the growing prevalence of vape shops, which sell e-cigarettes and other vapour products exclusively,<sup>37 38</sup> is evidence of dramatic change in the retail environment for tobacco products. The quantity, location and regulation of vape shops are not well documented. Particularly in countries where vape shop workers mix solutions that contain liquid nicotine on site, and permit customer sampling, this new retail environment warrants research to protect worker and customer safety, to restrict youth access, and to regulate products and marketing that may be attractive to youth.

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