



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

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The tobacco industry spends about \$8.6 billion a year to market its cigarette and smokeless tobacco products throughout the United States, and 97.2 percent (\$8.3 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 cigarette and smokeless tobacco marketing expenditures (96.0%) 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 tobacco purchases.

- In 2022, price discounts for cigarettes (e.g., off-invoice discounts, buy downs and voluntary price reductions to reduce the price of cigarettes to consumers) totaled over \$6.8 billion, accounting for nearly 86 percent of total cigarette company marketing expenditures and making it by far the largest marketing expense category. Cigarette companies spent an additional \$89.5 million on coupons in 2022.<sup>3</sup>
- Smokeless tobacco companies spent \$394.3 million (68.9% of all marketing expenditures) on price discounts in 2022. As with cigarettes, price discounts for smokeless products were the largest expense category. Smokeless tobacco companies spent an additional \$29.9 million on coupons in 2022.<sup>4</sup>
- In 2021, e-cigarette companies spent \$261.6 million (30.4% of all marketing expenditures) on price discounts, the second-largest expense category after promotional allowances, another category that is meant to lower product prices.<sup>5</sup> Between 2018 and 2020, spending on sampling (free or deeply discounted) more than doubled to \$140.1 million. FTC stated, "The increased spending occurred because following the ban on free e-cigarette samples, some companies began offering e-cigarette products for \$1 or a similar highly discounted price in order to evade the spirit, if not the letter, of the FDA's sampling ban."<sup>6</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>7</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>8</sup> These three brands also happen to be preferred by more than two-thirds of youth smokers (Marlboro is by far the most popular brand among youth smokers (12-17) reporting the product they used in the past 30 days, followed by Camel, Natural American Spirit, and Newport).<sup>9</sup>—a

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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.

fact which should come as no surprise, since the U.S. Surgeon General has continually found that youth are sensitive to tobacco industry price promotions.

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>10</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 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>11</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 2022, cigarette companies spent \$824.7 million (10.3% of total advertising expenditures) on promotional allowances, while smokeless tobacco companies spent \$72.9 million (12.7% of total advertising expenditures).<sup>12</sup> In 2021, e-cigarette companies spent \$271.4 million (31.6% of total marketing expenditures) in this category.<sup>13</sup> A 2022 systematic review found that these contracts incentivize tobacco retailers in exchange for manufacturer control of tobacco product availability, placement, pricing and promotion in the retail setting. These contracts also undermine tobacco control efforts in the retail setting through discounted prices, promotions and highly visible placement of marketing materials and products. Tobacco companies know that that "eye level is buy level,"<sup>14</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>15</sup>

### **Tobacco Company POS Advertising**

Much of the more visible tobacco company advertising at the POS consists of cigarette and smokeless 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>16</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 2022, cigarette companies spent \$37.3 million on POS advertising materials, a decrease (24.0%) from 2021. In addition, smokeless tobacco companies spent \$14.1 million, also a decline (25.2%) from 2021. In 2021, e-cigarette companies spent \$96.5 million on POS marketing materials.<sup>17</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>18</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>19</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>20</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>21</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>22</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>23</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>24</sup> the chance of a kid being repeatedly and regularly exposed to tobacco company marketing is high.

Data from the National Youth Tobacco Survey (NYTS) show that 59.8 percent of middle school students and 69.7 percent of high school students were exposed to tobacco advertisements in stores in 2021.<sup>25</sup> According to data from the 2011 NYTS, 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>26</sup> Tobacco retailer density has also been linked to greater youth initiation of tobacco use.<sup>27</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>28</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>29</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>30</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 2022 systematic review found that tobacco coupons are more often received and used by price-sensitive populations, including youth and youth adults. Because the reviewed research suggested that coupon redemption is associated with increased smoking initiation and decreased cessation, tobacco coupons could undermine the impact of tobacco tax increases on reducing tobacco use.<sup>31</sup>
- A 2021 study using 2016-2018 data from the government's Population Assessment of Tobacco and Health (PATH) study determined that receiving any tobacco product price promotion "may play an important role in youth's increased tobacco use" after finding an association between these types of pricing strategies and youth (12-17 years old) initiating tobacco use, becoming current users, and ever regular use.<sup>32</sup>
- A 2018 study using 2013-2014 PATH data found that 7.9% of youth (12-17 years old) had received a tobacco product discount coupon, whether or not they had ever used tobacco products, and those who received coupons were more likely to try a tobacco product and report past 30-day use one year later compared to those who did not receive coupons.<sup>33</sup>
- 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>34</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>35</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>36</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>37</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>38</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>39</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>40</sup> Newport is the leading brand of cigarettes among African American youth ages 12-17.<sup>41</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>42</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>43</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>44</sup>
- POS advertising and displays have been found to increase average tobacco sales by 12 percent.<sup>45</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>46</sup>

**Campaign for Tobacco-Free Kids, April 22, 2024 / Laura Bach**

**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>2</sup> U.S. Department of Health and Human Services (HHS), *Preventing Tobacco Use Among Youth and Young Adults: A Report of the Surgeon General*. Atlanta, GA: U.S. Department of Health and Human Services, Centers for Disease Control and Prevention, National Center for Chronic Disease Prevention and Health Promotion, Office on Smoking and Health, 2012, <https://www.cdc.gov/tobacco/sgr/2012/index.htm>.

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