Operation Storefront: Observations of Texas Retailer Tobacco Advertising and Compliance with Tobacco Laws

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EXECUTIVE SUMMARY

The tobacco industry has had a long history of spending enormous sums of money on advertising their products. Ad campaigns and promotional gimmicks reveal an industry effort to advertise to youth. The Operation Storefront Campaign was developed in California in 1994 to curtail the proliferation of tobacco advertising and promotion at California retail outlets. Youth and adult volunteers documented point-of-purchase advertising and promotions in 52 counties.

We conducted a similar but much smaller effort in 409 retail stores in two predominantly rural Texas counties and the metropolitan Houston area. We found that the most heavily advertised brands were Marlboro and Camel. These are also the most popular brands among youth. Marlboro was advertised about twice as frequently as other brands.

There were also a large number of promotional items found in retail stores selling tobacco products. There were approximately six promotional items per store. Promotions for cigarettes were most common among the Marlboro brand. However, smokeless tobacco promotional items were actually more common and more likely to be found in rural areas. Other common tobacco law violations included tobacco ads found at three feet or below (36% of stores) and the state comptroller warning sign not present (24% of stores). It is recommended that operation storefront activities be expanded to include more stores in the future.

TABLE OF CONTENTS

II
ND CALIFORNIA'S OPERATION STOREFRONT 1 2 3 4 5 6 6 6 7 6 7 6 7 7 7 8 8 8 8 8 8 9 7 7 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
4
4
6
8
9
12
15
17
18
19

Tobacco Advertising and California's Operation Storefront

In recent years, the tobacco industry has spent an estimated \$100 million a year advertising their products. Between 1993 and 1996 the tobacco industry spent ten times the amount on tobacco advertising and promotions in California than the California Tobacco Control Program spent on interventions to reduce tobacco use (Pierce et al., 1998). Promotional items such as T-shirts, caps, jackets, sunglasses, lighters and sporting goods imprinted with a brand's logo have become frequent marketing schemes. These items are often obtained from catalogues or at sporting or cultural events. In addition, the industry uses retail value-added strategies such as "buy one, get one free" programs (California Tobacco Control Update, 2000).

Recently, a sample of California teens were asked to name the brand of cigarettes they had seen advertised most. Teens overwhelmingly named Marlboro and Camel as the most advertised brands (Pierce et al., 1998). It is no coincidence that these are the most popular brands among teenage smokers. California Tobacco Surveys (CTS) also found that approximately 70 percent of 15-17 year-olds were able to identify a favorite tobacco ad without prompting. The CTS study also indicated that youth tend to understand and agree with the messages in cigarette advertisements (Pierce et al., 1994).

Between 1993 and 1996 the number of teens that possessed a tobacco promotional item increased from 8.9 percent to 13.6 percent. The largest growth of possession of tobacco promotional items occurred among the youngest teens. There was over a 200 percent increase in ownership among 12-13 year olds between 1993 and 1996. One recent study has found that youth who report having a favorite tobacco ad and who own a promotional item are more likely to try smoking (Pierce et al., 1998).

The tobacco industry also has a long history of product placement and marketing at small retail outlets, places likely to be visited by youth. More than half the stores surveyed in California reported that they had received various incentives from tobacco companies such as cash or free or discounted products. Only 36 percent and 14.5 percent of these stores received similar offers from soda and candy companies, respectively (California Tobacco Control Update, 2000).

The Operation Storefront Campaign was developed in California in 1994 to curtail the proliferation of tobacco advertising and promotion at California retail outlets. Youth and adult volunteers documented point-of-purchase advertising and promotions in 52 counties (A Model for Change, 1998). Within three years the campaign reduced the number of stores with tobacco ads near candy by 13 percent as well as tobacco ads located at eye-level of children by 11 percent (California Tobacco Control Update, 2000).

With the success of California's Operation Storefront, other states were eager to test the campaign. Missouri conducted a similar survey in 1997 and Massachusetts followed with one in 1998 (Massachusetts Department of Public Health, 1998). Similarly, Kansas, Florida, and Oregon conducted Operation Storefronts in their states. Collectively, these projects continue to uncover large numbers of tobacco ads and promotional items.

The Campaign for Tobacco-Free Kids is sponsoring a national Operation Storefront Project. They are asking youth throughout the country to conduct surveys of tobacco advertising and promotional efforts at businesses in their community that sell tobacco products. They provide the data collection forms. Youth are asked to publicize the results through the local press and send their data and photos to the national office of the organization. Results will be released on "Kick Butts Day 2001."

Most states now require warning signs to minors regarding the penalties for tobacco purchases in retail establishments. A recent study found that retail stores that only display tobacco industry signs such as "We Card" and "It's the Law", sell tobacco products to minors at a rate equivalent to not having any signs at all. In contrast, stores with only the government-sponsored signs sell tobacco illegally at less than half the rate. The rate of illegal sales was 22 percent with industry only signs compared to 10.5 percent for government only signs (Cowling and Robins, 2000).

Methods

Operation Storefront Texas was conducted during the summer and fall of 2000 to measure the amount and type of tobacco advertising in specific retail stores, and to determine if the stores were in compliance with state tobacco laws. Four graduate students conducted the observations. They were trained to identify tobacco promotional items, proper display of signs and licenses, self-service tobacco access, tobacco advertising within 1000 feet of a church or school, ads located next to candy, and ads below three feet. All of the above indicators are violations of state law. Additionally, observers listed the frequency and type of both outdoor and indoor tobacco advertising. (See attached instrument).

The original sample included all establishments with a license to sell tobacco products in two rural counties, as well as a random sample of licensed retailers in Harris County (an urban county that includes the city of Houston). This list of 1500 vendors was reduced to 409 stores by eliminating liquor stores, bars, clubs, restaurants, and tobacco-only merchants. These merchants were eliminated from the sample because they were not

open to youth or because of the low volume of sales to youth (in the case of restaurants). The resulting stores included 155 grocery stores, 26 drugs stores, 6 department stores, and 219 convenience stores.

Results

Frequency and Mean Number of Outdoor Ads by Brand Type

Marlboro was the most heavily advertised brand found on the outside of stores (153 total outdoor ads). There were no significant differences in the mean number of Marlboro ads by study area or by urban versus rural settings (See Table 1). Camel cigarettes were the next most frequently advertised brand of cigarettes found on the outside of stores (93 total outdoor ads). There were no differences in the mean number of ads by study area or by population size. Winston was the third most heavily advertised brand (86 total outdoor advertisements). It was significantly more likely to be found in rural settings.

Kool was the fourth most advertised cigarette brand outside stores (70 outdoor ads). It was significantly more likely to be found in the control study area and outside rural stores. Newport completes the list of brand-name cigarettes with sixty (60) outdoor ads. There was no difference in the mean number of ads by study area or by store setting. The most frequent outdoor advertisements encountered were other brands of cigarettes not already on our list (244 outdoor ads). This is an indication of the proliferation of outdoor ads for generic brands of cigarettes. Cigars and smokeless brands were far less frequently advertised on the outsides of stores (only one outdoor cigar ad and fifteen smokeless tobacco ads). Smokeless ads were slightly more likely to be found in rural

Table 1: Frequency and Mean Number of Outdoor Ads by Brand Type

Brand		Pilot Area (N = 338)	Control (N = 68)	Total (N = 406)	Urban (N = 312)	Rural (N = 94)	Total (N = 406)
3.5 11	Mean	.37	.40	.38	.38	.38	.38
Marlboro	Frequency	(126)	(27)	(153)	(117)	(36)	(153)
Comol	Mean	.24	.19	.23	.23	.23	.23
Camel	Frequency	(80)	(13)	(93)	(71)	(22)	(93)
Winston	Mean	.18	.36	.21	.17	.34 ^a	.21
Willston	Frequency	(62)	(24)	(86)	(54)	(32)	(86)
Kool	Mean	.15	.31 ^a	.17	.14	.28ª	.17
Kooi	Frequency	(49)	(21)	(70)	(44)	(26)	(70)
Newport	Mean	.13	.24	.15	.13	.20	.15
Newport	Frequency	(44)	(16)	(60)	(41)	(19)	(60)
Other	Mean	.59	.63	.60	.53	.83	.60
Brands	Frequency	(201)	(43)	(244)	(166)	(78)	(244)
Cigars	Mean	.00	.01 ^a	.00	.00	.01	.60
Cigais	Frequency	(0)	(1)	(1)	(0)	(1)	(1)
Smokeless	Mean	.02	.13 ^b	.04	.02	.10 ^a	.04
Sillokeless	Frequency	(6)	(9)	(15)	(6)	(9)	(15)

a = p. < .05; b = p. < .01

settings, but the small number of ads cast doubt on the practical significance of this finding.

Frequency and Mean Number of Indoor Ads by Brand Type

Tobacco ads were found far more frequently on the inside of stores than the outside. In fact, indoor ads were over eight times more prevalent on the inside of the store than outside. There were a total of 6,186 indoor tobacco ads found in 393 stores. That is almost sixteen (16) tobacco ads per store.

Of the most popular brands, Marlboro was most prevalent, followed by Camel, Winston, Kool, and Newport. There were a total of 1,366 indoor Marlboro ads; almost twice as many as Camel, and almost as many as all other brands not mentioned by name combined. There were no significant differences in the mean number of Marlboro ads by study area or setting.

Table 2: Frequency and Mean Number of Indoor Ads by Brand Type

Brand		Pilot Area (N = 325)	Control (N = 66)	Total (N = 393)	Urban (N = 301)	Rural (N = 90)	Total (N = 391)
3.6 11	Mean	3.4	3.8	3.5	3.4	3.6	3.5
Marlboro	Frequency	(1,114)	(252)	(1,366)	(1,044)	(322)	(1,366)
Camel	Mean	1.6	2.7 ^b	1.8	1.7	2.1	1.8
Calllel	Frequency	(521)	(179)	(700)	(507)	(193)	(700)
Winston	Mean	1.6	2.3 ^a	1.7	1.6	1.9	1.7
vv iliston	Frequency	(506)	(151)	(657)	(486)	(171)	(657)
Kool	Mean	1.2	1.5	1.2	1.2	1.3	1.2
Kooi	Frequency	(386)	(96)	(482)	(365)	(117)	(482)
Newport	Mean	1.2	1.5	1.2	1.2	1.3	1.2
Newport	Frequency	(378)	(101)	(479)	(365)	(114)	(479)
Other	Mean	4.0	5.7 ^b	4.3	4.1	5.0	4.3
Brands	Frequency	(1,298)	(377)	(1,675)	(1,223)	(452)	(1,675)
Cigars	Mean	0.2	0.1	0.2	0.2	0.1	0.2
Cigars	Frequency	(52)	(7)	(59)	(51)	(8)	(59)
Smokeless	Mean	1.6	3.9°	2.0	1.6	3.3°	2.0
Sillokeless	Frequency	(508)	(260)	(768)	(469)	(299)	(768)

a = p. < .05; b = p. < .01; c = p < .001

Camel, Winston, and other brand ads were significantly more likely to be found in the control study area. Smokeless brands were far more prevalent in the control study area as well as in rural settings. Cigars were advertised infrequently (overall mean of 0.2) and there was little difference in cigar ads by study area or setting.

Frequency and Mean Number of Promotional Items by Brand Type

Marlboro was the most frequent cigarette brand to advertise in the stores we visited by distributing promotional items to customers (131 total promotional items). Marlboro promotional items were twice as prevalent than those by any other brand type (See Table 3). They were almost as prevalent as the catchall category of all other cigarette brands. These promotional items were three times more likely to be found in the control study area and twice as likely to be found in rural stores.

Brand		Pilot Area	Control	Total	Urban	Rural	Total
		(N = 338)	(N = 68)	(N = 406)	(N = 312)	(N = 94)	(N = 406)
Marlboro	Mean	.27	.71°	.34	.27	.57°	.34
Mariboro	Frequency	(85)	(46)	(131)	(80)	(51)	(131)
Camel	Mean	.11	.31 ^b	.15	.11	.24 ^a	.15
Camer	Frequency	(36)	(20)	(56)	(34)	(22)	(56)
Winston	Mean	.13	.28	.16	.13	.26	.16
vv iliston	Frequency	(43)	(18)	(61)	(38)	(23)	(61)
Vool	Mean	.08	.32°	.12	.07	.27°	.12
Kool	Frequency	(24)	(21)	(45)	(21)	(24)	(45)
Newport	Mean	.14	.23	.16	.13	.26	.16
	Frequency	(45)	(15)	(60)	(37)	(23)	(60)

.40

.04

(15)

.38

(144)

(154)

.36

.05

(15)

.33

(97)

(106)

.54

(48)

0

(0)

.53

(47)

.40

.04

(15)

.38

(144)

(1954)

Table 3: Frequency and Mean Number of Promotional Items by Brand Type

.52

(34)

0

(0)

.43

(28)

Mean

Mean

Frequency Mean

Frequency

.38

.05

(15)

.36

(116)

(120)

Other

Brands

Cigars

Smokeless

Winston, Newport, and Camel all had roughly equivalent numbers of promotional items in the stores we visited. Camel brand promotional items were found almost three times more frequently in the control study area and two times more frequently in rural areas. There was no difference in the prevalence of Winston and Newport promotional items by study area or setting.

Of the listed brand names, Kool promotional items were the least common (45 total promotional items), but they were far more prevalent in the control study area and in rural settings. Again, cigar promotional items were relatively rare. There were only fifteen (15) cigar promotional items found and all of them were in the Houston area.

Of all types of tobacco products that we looked at, smokeless tobacco was represented the most in terms of promotional items. There were a total of 144 smokeless tobacco promotional items found; slightly more than Marlboro. There were no statistical

Frequency a = p. < .05; b = p. < .01; c = p. < .001

differences in the mean number of smokeless tobacco promotional items by study area or setting.

Frequency and Percentage of Non-promotional Item Legal Violations

In the vast majority of stores we visited, a tobacco license or permit was not clearly visible as indicted by state law (89% of stores). The license or permit is not very large in size and thus would be quite easy to miss. It is likely that in many cases the stores that we visited do in fact have tobacco permits posted somewhere in the store, but because of the numerous items hanging on store walls they simply were not easily observable. Stores in the pilot study and urban areas were far more likely than the control and rural areas to not have a permit visible.

About one-third of the stores (36%) had tobacco ads located three feet or below. A number of observers have suggested that this may be an advertising strategy employed by tobacco companies to attract young kids, but it also clearly illegal. About one-fourth (24%) of the stores did not have a Texas comptroller sign present (or at least clearly visible to our researchers). This violation was significantly more likely to occur in the control study area.

In ten percent (10%) of the stores, tobacco ads were located next to candy. This has been described as another tobacco industry tactic to attract very young children to tobacco advertising. Only six percent (6%) of the stores had outdoor tobacco advertising within 1000 feet of a church or school. This figure is likely somewhat low due to our procedure for checking for this violation. Our observers were instructed to note whether

Table 4: Frequency and Percentage of Non-promotional Item Legal Violations

Type of Violation	Pilot Area	Control	Total	Urban	Rural	Total
	% (n)	% (n)	% (n)	% (n)	% (n)	% (n)
Tobacco ads located next	10% (32)	12% (7)	10% (7)	10% (30)	11% (9)	10% (39)
to candy						
Tobacco ads located 3 feet	35% (110)	43% (26)	36% (136)	35% (102)	40% (34)	36% (136)
or below						
Outdoor ads located w/in	6% (20)	5% (3)	6% (23)	6% (19)	5% (4)	6% (23)
1000 ft. of church or						
school.						
Texas comptroller sign not	22% (72)	33% ^a (20)	24% (92)	23% (69)	27% (23)	24% (92)
present						
Tobacco license or permit	92% (292)	76%° (45)	89% (337)	92% (270)	80% ^b (67)	89% (337)
not visible						
Clerk assistance necessary	2% (5)	2% (1)	2% (6)	1% (4)	2% (2)	2% (6)
to obtain tobacco products						

they saw a church or school as they drove to a store and to use their odometer to check whether the store was within 1000 feet. They did not drive in a 1000-foot circumference of the store to check for this violation. Finally, clerk assistance to purchase tobacco was necessary to purchase tobacco products in all but two percent (2%) of the stores that we visited.

Advertisements by Type of Store

It was expected that we would find a large number of tobacco advertisements at convenience stores. A large percentage of adults (and youth) make their tobacco purchases at these venues. Thus, we were quite surprised to find that in some cases there were a higher mean number of ads at other types of stores for certain brands. Figure 1 displays the mean number of total Marlboro advertisements (indoor and outdoor) by store type. While there were a significant number of advertisements in convenience stores, as we would expect, there were actually a higher average number of Marlboro ads in department and grocery stores.

Figure 1: Mean Total Marlboro Ads by Store Type

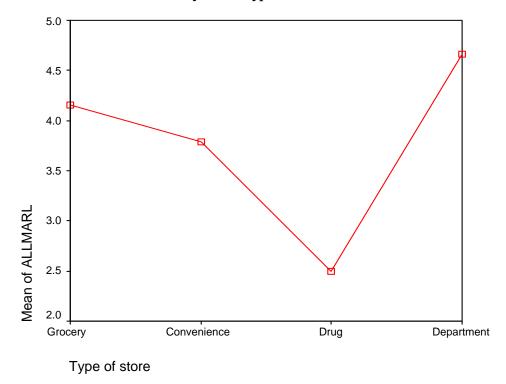


Figure 2: Mean Total Camel Ads by Store Type

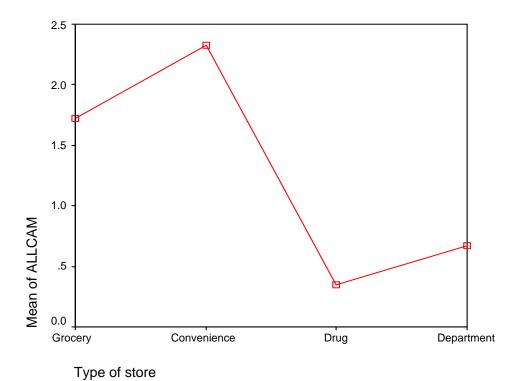


Figure 3: Mean Total Winston Ads by Store Type

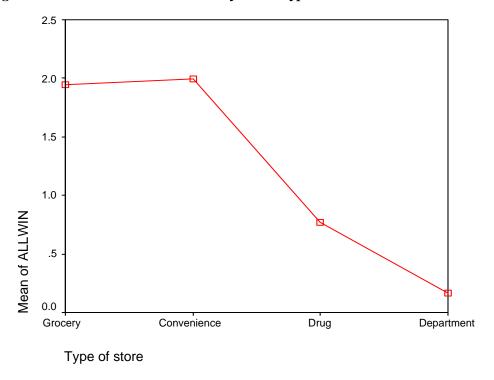
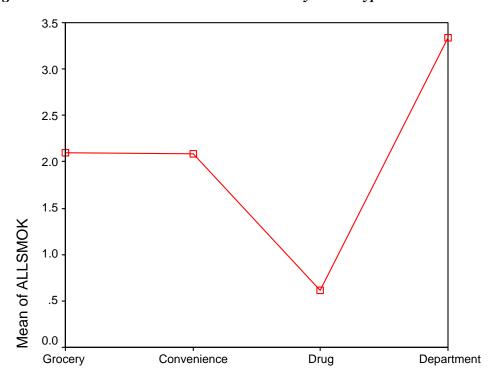


Figure 4: Mean Total Smokeless Tobacco Ads by Store Type



Type of store

In contrast, Camel ads were most prevalent at convenience stores, but there were also a fairly high concentration of ads at grocery stores (See Figure 2). They were far less likely to be found at department stores than the Marlboro brand. Winston cigarettes were the third most heavily advertised brand. They were slightly more likely to be found at grocery stores than convenience stores. These ads were far less likely to be found at drug stores and department stores.

Smokeless tobacco was just behind Marlboro in the total number of advertisements. Just like Marlboro, smokeless tobacco was most likely to be advertised in department stores. Marlboro and smokeless tobacco have historically appealed to youth. Perhaps the tobacco industry has attempted to shift advertisement away from convenience stores toward department stores as a venue that may not receive as much attention from enforcement and media activities.

Promotional Items by Store Type

Marlboro had the highest average advertisements in department stores, but also had a high average number of ads in grocery and convenience stores (See Figure 1). In contrast, Marlboro promotional items were by far most prevalent in department stores (See Figure 5). The pattern for Camel promotional items is somewhat similar to the pattern of Camel advertising (See Figure 6). Camel promotional items were most prevalent in convenience stores and least prevalent in drug stores. Unlike advertisements, however, there appear to be a fairly high number of Camel promotional items in department stores.

Figure 5: Mean Marlboro Promotional Items by Store Type

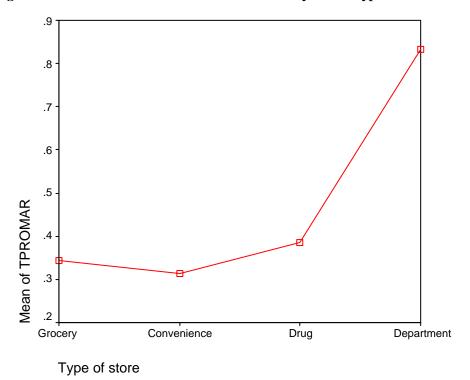
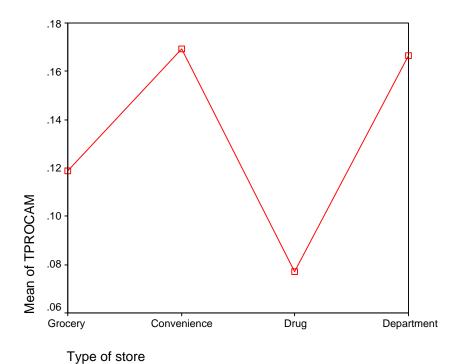
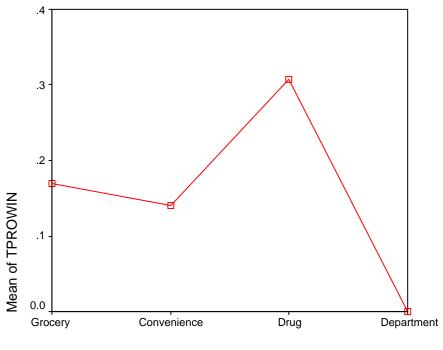


Figure 6: Mean Camel Promotional Items by Store



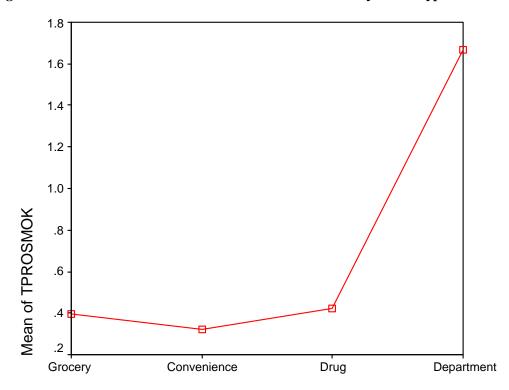
Type

Figure 7: Mean Winston Promotional Items by Store Type



Type of store

Figure 8: Mean Smokeless Tobacco Promotional Items by Store Type



Type of store

Winston advertisements were most likely to be found in grocery and convenience stores, but Winston promotional items were far more prevalent in drug stores (See Figure 7). Winston cigarettes were the only brand type most likely to have promotional items in drug stores. The pattern of smokeless tobacco promotional items was very similar to that of Marlboro (See Figure 8). Smokeless tobacco promotional items were four times more likely to be found in department than grocery or drug stores. The fewest number of smokeless tobacco promotional items were found in convenience stores.

We also checked whether other types of tobacco law violations vary significantly by store type. With one exception, there were no significant differences on any legal violations other than promotional items by type of store. The one exception is that tobacco ads located at three feet or below were far more prevalent in grocery stores than other types of retail establishments.

Discussion

The results of Operation Storefront Texas demonstrate that patterns of storefront advertising emulate youth purchasing patterns and brand preferences. Most ads were displayed in convenience stores, where youth have the most accessibility and where illegal sales seem to be highest. However, a significant number of tobacco ads were found in department stores as well. Since children are also more easily influenced by images, it comes as no surprise that the brands most heavily advertised, Marlboro and Camel, are the popular choice among youth.

Marlboro was advertised about twice as frequently as any other ad, followed by Camel and Winston. Advertising was far more common on the inside of stores. There were about sixteen tobacco ads per store visited. Thus, one can conclude that there was

tremendous saturation of tobacco products within these stores. There was also a large number of smokeless tobacco ads found, especially in rural areas.

Of the 406 stores visited, we found a total of 2,366 promotional items. That is an average of almost six promotional items per store. The most common types of promotions were 2 for 1 offers, coupons, and catalogues. Of the cigarette brands, Marlboro and Winston distributed the most promotional items. Promotional items for smokeless tobacco were actually more prevalent than for Marlboro cigarettes. Marlboro, Camel, and Kool promotional items were more likely to be found in rural areas than in the city. We can conclude that tobacco promotional items continue to be quite prevalent and may be targeted to customers in rural areas. One might speculate that enforcement efforts have yet to reach many rural areas.

A very large percentage (89%) of the stores did not have a tobacco permit that was clearly visible to our observers as required by state law. This finding must be reported with some caution because of the admitted difficulty in locating these permits in what are often very cluttered store walls. About one-third of the stores visited display tobacco ads at eye-level of small children, and this is especially common in grocery stores. An additional twenty-five percent (25%) of the stores did not have a Texas comptroller sign present.

Tobacco advertisements vary significantly by store type. Marlboro and smokeless tobacco ads and promotional items appear to be most common in department stores.

Camel ads and promotional items are more common in convenience stores. The number of ads and promotional items in large department stores were a surprising finding in this study and may indicate a shift in advertising away from convenience stores.

Recommendations

- We recommend expanding the Operation Storefront project to include a much larger sample of stores in the future. We intend to expand our efforts in the summer of 2001 to include at least 1,000 stores and to utilize GIS mapping software to determine if there are concentrations of advertising and legal violations in specific settings (i.e., minority concentrated neighborhoods).
- Both the original Operation Storefront in California and the national campaign currently being encouraged by the Tobacco Free Kids organization rely on volunteer efforts. The California project has had some effect in changing advertising and promotional patterns among local retailers. After the current studies have been completed, creating a volunteer-based Operation Storefront program in Texas is an option the Texas Department of Health might consider.
- Other Operation Storefront programs have had accompanying media campaigns
 to highlight the advertising problems in communities. We suggest that once the
 studies have been completed, the Texas Department of Health should promote
 some of the more salient findings to the press.
- Use the results from Texas Operation Storefront projects to educate youth about tobacco industry advertising strategies so that they may be better informed in their decisions regarding tobacco use.

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Appendix A

Operation Storefront 2000 Data Form

Exterior

STORE ADVERTISING STUDY 2000

Storena Addres Addres Store	SS SS	D	Date: Observer: Is information on label correct? 1Yes 2 No (If no, p in correction be					
Store Informa	ation Corrections	:						
Store State (Circle One)	us: 1 Complet 2 Partial		nied/No Data nied/Exterior Onl		No Tobacco Pro		e Not Open	
Exterior T All ads on:	Marlboro	rtising ————————————————————————————————————	Winston	Kool	Newport	All Other Cigarette Brands	Cigars	All Smokeless Brands
Windows/ Doors								
Building								
Sidewalk/ Lot								
**************************************	above how m	***********	er language a	**************************************	*******	*****	****	
	.nti-tobacco N		lling to minors or	not smoking)				
	ck the percentage		ors (not just to		rage of doors a	nd windows in	this store. (See	examples on
O%	up to 10		up to 25%	up t	o 50%	up to 7.	5%	up to 100%
	ol or Church ny outdoor advert		000 feet of a chur	ch or school?	1 Yes 2	No		

21

Storename Store ID Address Address Store Type

Observers:	

Interior	10	bacco	Adve	rtising

	Marlboro	Camel	Winston	Kool	Newport	All Other	Cigars	All
						Cigarette		Smokeless
						Brands		Brands
English								
Other Language								

Interior Tobacco Promotional Items

Interior 10	bacco Prom	lononai men						
	Marlboro	Camel	Winston	Kool	Newport	All Other	Cigars	All
						Cigarette		Smokeless
						Brands		Brands
English								
Other								
Language								
Language								
T-Shirts &								
other								
clothing								
Kiddie								
Packs								
Carrage								
Coupons								
Catalogues								
Other (write								
it in)								
<u> </u>								
1								

Advertising Location

1 Yes Any tobacco ads located next to candy? **2** No

Any tobacco ads located at 3 feet or below? 1 Yes **2** No

Warning Signs

8 X 14 Texas Comptroller Sign present? **2** No 1 Yes If yes, in English? 1 Yes **2** No If yes, in Spanish? 1 Yes **2** No If yes, in other language? 1 Yes **2** No Other warning sign(s) present (i.e. We Card) 1 Yes **2** No Is a tobacco permit or license visible? 1 Yes 2 No

Method of Access

Clerk assistance necessary to obtain tobacco products? 1 Yes 2 No