

Texas Tobacco Prevention Initiative

Selected TTPI Tobacco Sales

November 1, 2000 through October 31, 2002

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San Antonio, Texas**

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Summary:

Sales of tobacco products were monitored in 4-week intervals for 2 years from November 2000 to November 2002, for 4 intervention counties (Harris, Fort Bend, Montgomery and Jefferson) and the state of Texas as a whole. A consumer research company provided the data and certain limitations apply as described in the Appendix 1. Overall, in our most comprehensive intervention area of Jefferson County, there was a 31.6% decrease in tobacco product sales compared to a statewide decrease of 17%. More detailed results are next.

Results:

State of Texas: The state witnessed a sustained decline in tobacco sales of 17%. The decline is due to a combined reduction of chew/snuff tobacco units (10%), cigars (10%), and cigarette packs (19%). (See Figure 1)

Whole-carton and multi-pack sales increased for the entire state by 59%. The reason for this increase is unconfirmed however, it could be due to annual promotional offers, impending changes in tax laws or changes in product reporting. This increase started around September 2001, and peaked in September/October of 2002. This phenomenon was also noted in the 4 county intervention markets.

Intervention Counties: Sales of all tobacco products in Harris Co. declined by 10.5%, due mostly to a 16.7% reduction in the sales of chew/snuff tobacco and 3.5% in cigars. Sales of cigarette packs remained unchanged, but the sales of whole cartons/multi-pack products increased by 142% with peaks around September 2001 and September-October 2002. (See Figure 2).

For Fort Bend Co. sales of all tobacco products actually increased by 1.8%, with a 5.8% increase in single pack sales, a decline of 16% in chew/snuff and 21.5% in cigar sales, and a 200% increase in multi-pack sales, peaking around the same times as Harris Co. (See Figure 3).

Tobacco sales in Montgomery Co. decreased by 14.3%. Chew/snuff and cigar sales declined by 16.6% and 1.8%, while single pack and multi-pack sales increased by 4.3% and 73.4% correspondingly. (See Figure 4).

Sales for Jefferson Co., which received the most comprehensive level of intervention activities during the monitored period, show an overall decline of 31.6%. This was due to reductions of 41.3% in chew/snuff tobacco, 17.5% in cigars, and 31.3% in single packs. Multi-pack sales also increased in Jefferson Co. by 223%. (See Figure 5).

Conclusion: The most comprehensive intervention area, Jefferson County showed the largest percent reduction in tobacco sales, and was the only county where single pack sales decreased over the entire monitoring period. The unchanged sales of single units in Harris Co. are a positive sign for tobacco control since Harris Co. is one of the fastest growing counties in the US. While it would be expected that tobacco sales would increase with the expanding youth

population, it did not. Secondly, lower or flat sales of single units tobacco packs suggests an impact on the purchasing behavior of young people who typically buy only single pack cigarettes.

FIGURE 1
Tobacco sales - TX

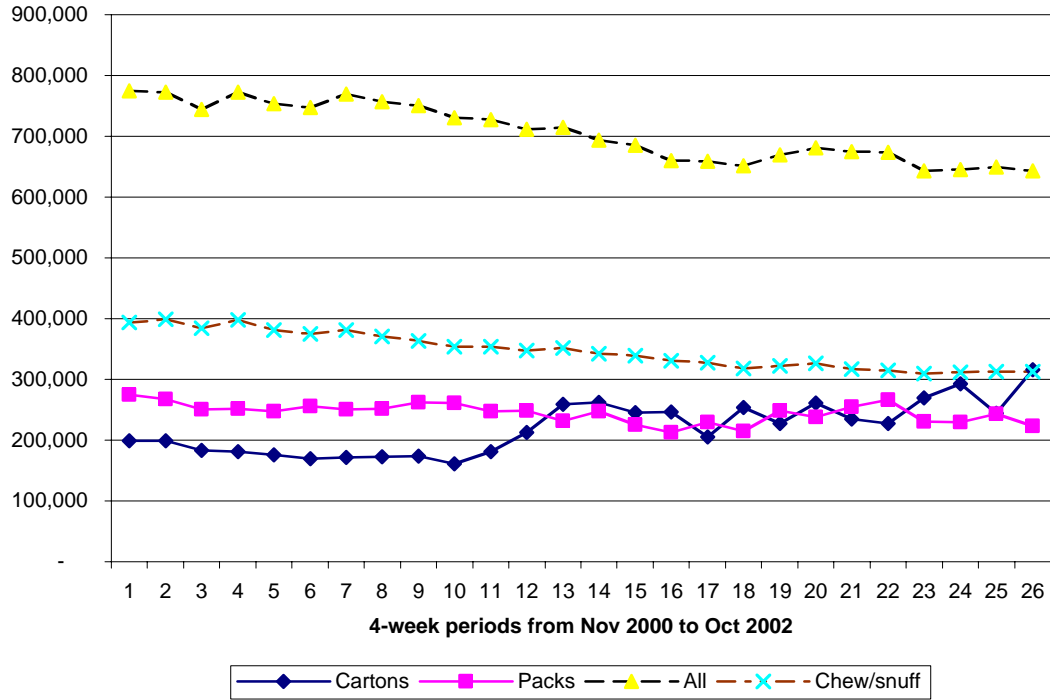


FIGURE 2
Tobacco sales - Harris Co

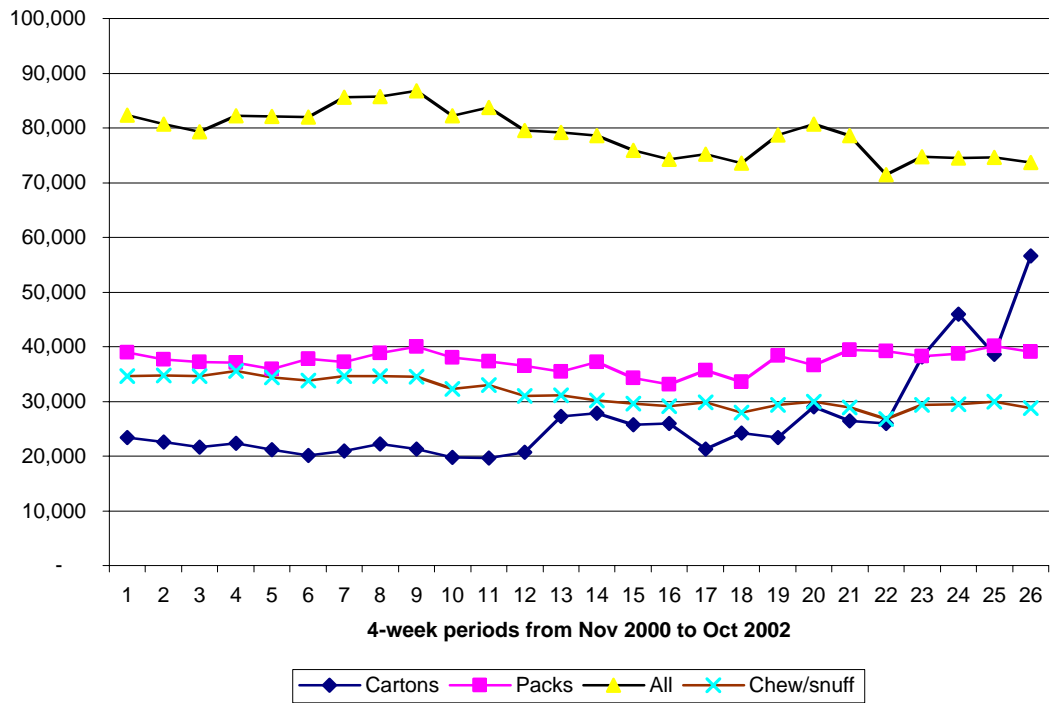


FIGURE 3
Tobacco sales - Ft- Bend Co

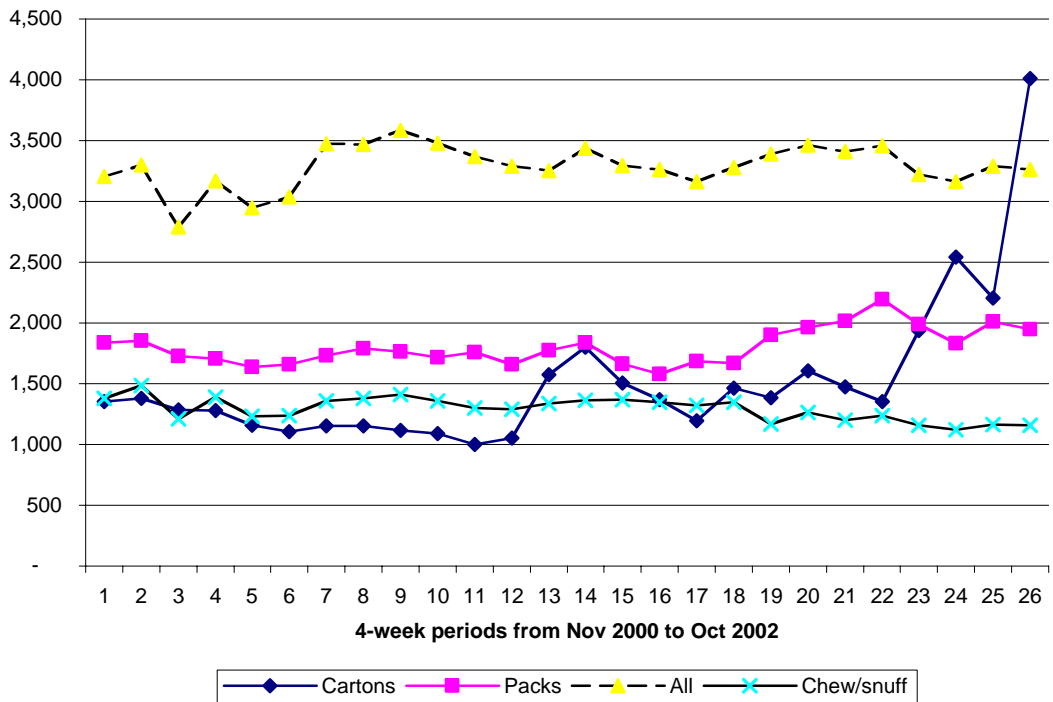


FIGURE 4
Tobacco sales Montgomery Co

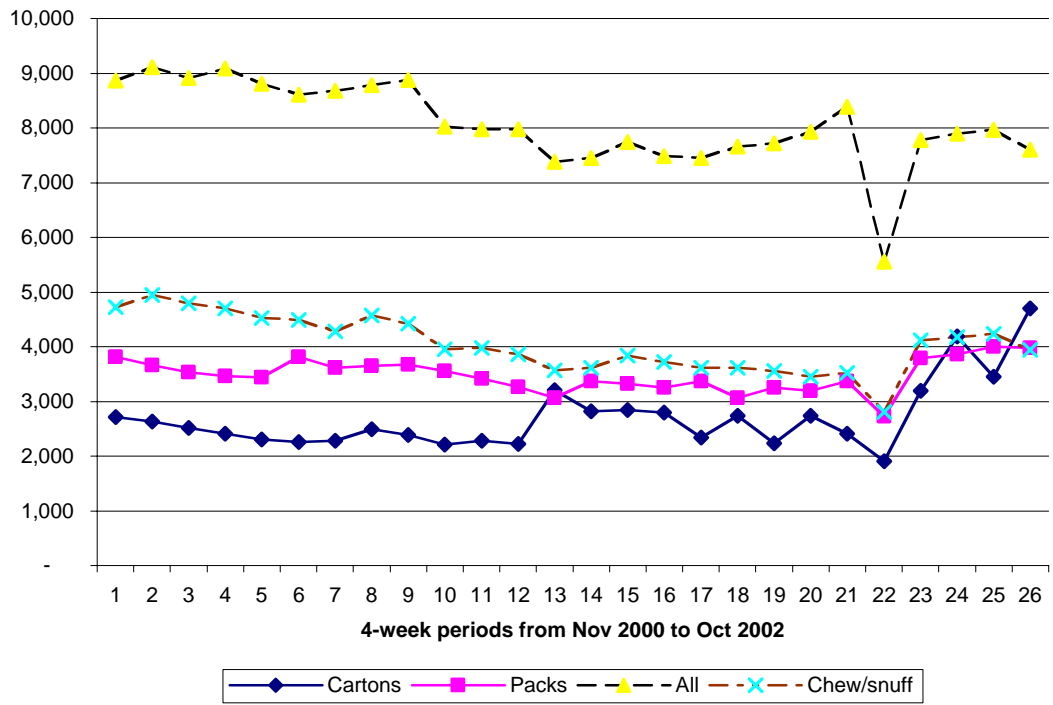
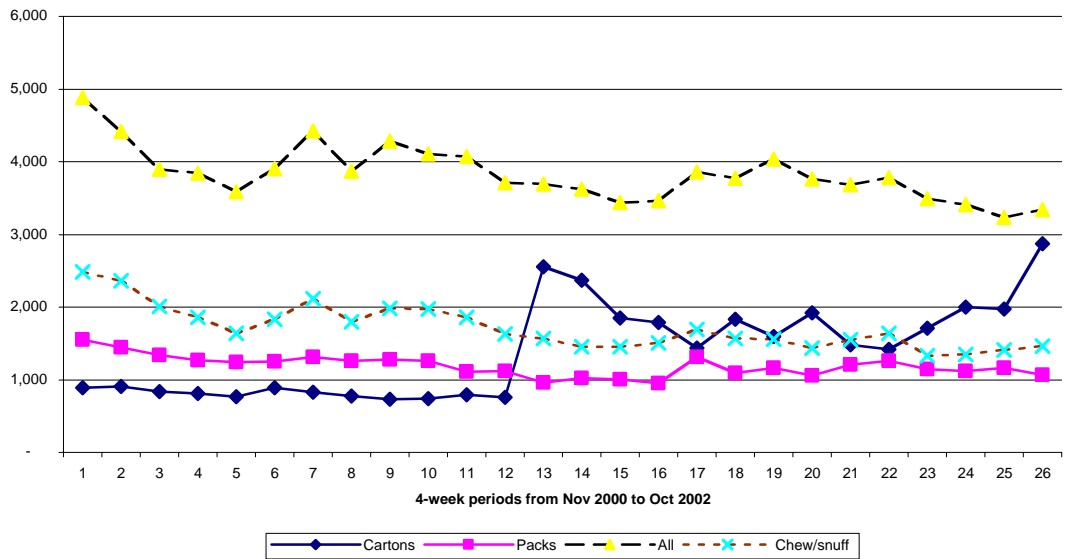


FIGURE 5
Tobacco sales - Jefferson Co



Appendix 1

TOBACCO PRODUCT VOLUME AND SALES DATA FROM 11/1/00 to 10/31/02

CATEGORY: Tobacco Products
Cigarettes

LEVEL OF DETAIL: The following type totals only will be included
Chewing Tobacco/Snuff
Cigars
Cigarettes/Single Pack
Cigarettes/Multi pack/Carton

MEASURES: Dollar Sales Volume Sales

GEOGRAPHIES: Texas
Harris County
Montgomery County
Fort Bend County
Jefferson County

TIME PERIODS: 26, 4-week time periods (2 years of monthly data 11/00 - 10/31/02)

Volume sales are defined as unit/volume distributed and dollar sales are defined as dollar per tobacco product category. A unit is no bigger than a pack, therefore cigarette carton sales were reassessed as per pack sold. Data was collected by scanner tracking from sales defined by zip code within the selected counties. Further, the data is from grocery stores, drug stores, and mass merchandisers. Monthly sales data were tabulated for the prescribed areas from 11/00 through 10/31/02.

Limitations of the sales data: First, the data does not include sales from convenience stores due to preexisting confidentiality agreements set up by those stores and the tobacco industry, which prohibited obtaining such information. Second, grocery stores are only those grocery stores that have total sales of over \$2 MM, and include grocery super-centers. All types of drug stores are included (i.e., small chains and independents non-prescription drug store) while mass merchandiser s includes only those stores with total sales over \$250MM except super-centers (i.e., Wal-Mart, Target).