Closing the Doors on Tobacco Promotion

CANCER RESEARCH UK

An assessment of small retailer preparations for tobacco point of sale display removal and longer-term tobacco disinvestment

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INTRODUCTION

Tobacco use and exposure to second hand smoke kills an estimated 6 million people each year worldwide. Although tobacco use in the UK has declined from over 40% in the 1970s to under 20%, it still kills 100,000 people each year and is estimated to cost the UK economy £13bn a year. The World Health Organization Framework Convention on Tobacco Control is an international treaty which details measures to reduce demand for tobacco, including a ban on tobacco advertising, noting that tobacco point of sale (PoS) displays can constitute a form of advertising. Exposure to tobacco PoS displays increases tobacco cravings and impulse tobacco purchases among adult smokers, as well as undermining quit attempts among those wishing to stop smoking by increasing cravings and urges to smoke. Studies also show that children who are exposed to tobacco point of sale displays are more likely to initiate smoking. Accordingly in England, tobacco PoS displays were removed in large shops in 2012 and are due for removal in small shops by 6th April 2015. This study assessed retailer preparations for the removal of PoS displays in small shops.

METHODOLOGY

Small shops selling tobacco in disadvantaged wards in Newcastle and in London were identified. These shops were audited and details about tobacco PoS displays were recorded including size and type of display as well as tobacco brands, electronic cigarette (e-cigarette) brands and promotional displays. Interviews were arranged with a subsample of 62 retailers to discuss plans for the implementation of the point of sale legislation (PoS law), sources of information and support, e-cigarette sales, and tobacco sales. The retailers were also asked about their reliance on tobacco products and whether they were interested in disinvesting from tobacco. The retail trade press was scanned for tobacco related articles which were then coded according to whether and how they referred to the PoS law, standardised packaging, and tobacco related content including quotes and other input from tobacco, retail and public health representatives.

RESULTS AND CONCLUSIONS

Retailers were largely aware of the PoS law, although there were some who were unsure of the date of implementation. Most retailers were prepared to implement the PoS law and most had either received, or expected to receive, help from the tobacco industry. The retail trade press was the other main source of information cited. Tobacco industry help ranged from paying for the tobacco PoS display changes completely, to providing information and advice about the changes. Where the tobacco industry was paying for the required changes they were mostly placing shutters or sliding doors over the existing display. Tobacco industry quotes from retail trade magazines suggest that the brief times when these shutters are open for serving customers are being seen as an opportunity for raising tobacco brand awareness.

An established relationship between retailers and tobacco industry representatives (reps) was reported throughout the study, with many retailers reporting visits from multiple tobacco reps alongside e-cigarette reps and small numbers of reps for other smoking related products such as rolling papers and lighters. Most tobacco PoS displays were owned by the tobacco industry and were regularly serviced by tobacco industry reps. However, around a quarter of retailers reported that their tobacco PoS display had recently been sold back to them, meaning that they would have to pay for any changes in line with the PoS law, but also that they would gain ownership and control over their tobacco PoS display.

A minority of retailers were opposed to the PoS law but more were opposed to standardised packaging. Nearly all retailers said that tobacco was either important or very important for business, yet nearly all (94%) acknowledged the low profit margins on tobacco products and around 40% of retailers were interested in reducing their reliance on tobacco. There were differing opinions towards a tobacco licensing system, although a large minority was supportive.

E-cigarettes were sold in the majority of shops although the brands, the number of brands and the placement of e-cigarettes varied. Some retailers reported low e-cigarette sales, whereas other retailers reported high demand for e-cigarettes. The two most prominent brands of e-cigarette were owned by the tobacco industry.

The retail trade press articles were predominantly opposed to tobacco control measures and, similar to the retailers, the articles were more negative towards standardised packaging than to the PoS law. There were more quotes and input from tobacco industry reps than from people in the public health field.

RECOMMENDATIONS

This report makes the following recommendations:

1. *Tobacco retail licensing system*: Around a fifth of retailers were in favour of a tobacco licensing system. The advantages and disadvantages of a licensing system should be explored further.
2. *Increase overall communication with tobacco retailers*: Given retailers' sources of information were predominantly the tobacco industry and retail trade press, there is an opportunity for

governmental and non-governmental sectors to have greater dialogue with retailers about the rationale for tobacco control and tobacco control measures in general.

3. *Educate retailers about the upcoming PoS law*: Most small retailers have decided how to comply with the PoS law but there is still an opportunity to ensure that all retailers are aware of the implementation date and the range of potential solutions.
4. *Economic research on small retailer tobacco sales*: Retailers showed an interest in decreasing their reliance on tobacco sales and nearly all acknowledged that tobacco products have very small profit margins. At the same time, retailers believed that they were very reliant on tobacco sales. Given the limited number of studies in this area, there is an opportunity for research to explore how tobacco retailers might disinvest from tobacco.
5. *Small retailers and health promotion*: There is an opportunity for small retailers to be health promoting. Large cities, including New York City, have developed programs to help retailers offer healthy products to their customers.
6. *E-cigarette sales*: A limited range of e-cigarettes were on sale in the small shops that were audited. Retailers seem to be cautious about potential future legislation and health consequences. Information and guidance on e-cigarettes may be helpful to retailers.

Background

This study assessed preparation by small retailers for the tobacco point of sale display legislation (hereafter referred to as the PoS law), due to be implemented in England by the 6th April 2015, following implementation in larger shops in April 2012 [1].

Burden of tobacco use in the UK

The burden of disease attributable to tobacco is a global health challenge. Tobacco use and second hand smoke kill an estimated six million people every year [2, 3]. The greatest harms from tobacco use are cardiovascular disease, cancer and respiratory disease [4, 5]. In the UK less than 20% of the population are smokers, a percentage that has reduced from over 40% in the 1970s [6-8]. Nevertheless, in the UK, 100,000 people still die each year of tobacco related disease, with a half of all persistent smokers expected to die as a direct result of smoking [9]. Financially the cost of smoking to society in England has been estimated at £13bn [10].

The Framework Convention on Tobacco Control and UK policies on tobacco advertising

To address the global tobacco epidemic, the World Health Organization Framework Convention on Tobacco Control (FCTC) set out a number of articles to reduce demand for tobacco [11]. Article 13 of the FCTC details the need for a comprehensive ban on all tobacco advertising, promotion and sponsorship. The FCTC guidelines for implementing Article 13 note that tobacco point of sale (PoS) displays are a form of advertising and should therefore be removed [12].

The UK government passed the Tobacco Advertising and Promotion Act in 2002 which set out a ban on tobacco advertising, phased in over a number of years [13, 14]. However, it did not include the removal of tobacco PoS displays nor the introduction of standardised packaging of tobacco products. In 2004, the UK ratified the FCTC [15] and in 2011, passed further legislation to require the removal of tobacco PoS displays [1]. The PoS law in England was to be implemented in two stages: large shops (those over 280 sq m) had to remove the displays in April 2012 with small retailers having until 6th April 2015 to implement the legislation [1, 16-18]. PoS laws had already been implemented successfully with high compliance in Ireland, Australia, Thailand, Norway, Canada and Finland [19-23] .

Impact of tobacco point of sale displays on smoking

Hastings and colleagues in 2008 [24] reported that tobacco PoS displays were being used as a marketing tool to influence purchasing behaviour. A systematic review of the literature by Paynter and Edwards in 2009 reported that children exposed to promotional displays of tobacco at the point of sale were more likely to initiate smoking and that adults exposed to such displays were more likely to experience cravings and make impulse purchases of tobacco [25]. The review also indicated that exposure to promotional displays undermined quit attempts in adult smokers.

Since the Hastings and Paynter reviews were published, a number of additional studies reported further support for their findings [26-34]. Similar to findings in adults, Kim and colleagues in a virtual store study in the United States found that young people were significantly less likely to try purchasing tobacco when tobacco PoS displays were removed [30]. Brand awareness, which has shown to be positively related with smoking initiation [17, 20], was found to decline among adolescents and young people following implementation of PoS law in Australia [19]. Additionally, studies show that a majority of *smokers* support PoS laws, and that after tobacco PoS displays are removed, support among smokers increases [35].

In Ireland, despite press reports of retailers going out of business because of the PoS law, there was no significant step change in tobacco sales observed in the year following implementation of the law over and above the general downward trend in tobacco sales over time [19, 36]. One review funded by the Tobacco Retailers' Alliance raised concerns about the PoS law increasing transaction times but this has not been confirmed by independent research [37, 38].

In summary, there is evidence that tobacco PoS displays can increase youth smoking initiation, lead to impulse purchases and increase urges to smoke among adults. PoS displays are also effective at communicating brand and price information to consumers, thereby functioning as a form of advertising [12].

Rationale for Current Study

Small retailers and PoS law

Most tobacco in the UK is purchased in small retail shops [39], and it is small retailers who are responsible for implementing the PoS law. However, there is no current information on their preparations for the law. To address this, we sought to identify small retailers' plans prior to the implementation date, and identify the extent to which retailers had received support for implementing the PoS law from outside sources.

In addition, we were interested in assessing current PoS displays of tobacco, and displays of nicotine related products not subject to the PoS law in England. The latter category included other smoking related products, such as rolling papers and lighters, and nicotine containing products (NCPs) such as electronic cigarettes (e-cigarettes) and nicotine replacement therapy (NRT). No previous research has investigated the presence of nicotine related products and NRT at the point of sale in England. Previous studies have found that e-cigarettes are available in around half of small retail shops in England [40, 41] but there has been no study of how they are displayed.

At the time of this study, the UK government was considering implementing standardised packaging of tobacco products which would require removal of nearly all branding from the tobacco packaging [42]. Together with the removal of tobacco PoS displays this would remove most forms of tobacco advertising and promotion in England. In Australia, where standardised packaging was implemented in December 2012, the retail trade organisations played a major role in lobbying against the policy prior to implementation [43]. We also therefore sought to ascertain retailers' views on standardised packaging in this study as well as their views on the PoS law and other new policy areas, including a tobacco licensing system. A study from New Zealand emphasised the importance of ascertaining retailers' attitudes – it found that few retailers opposed the removal of tobacco PoS displays, highlighting that the surveyed opinions of retailers differed from retailer views presented by tobacco industry and retailer organisations [44].

Retail trade press

The retail trade press consists of a number of magazines (print and online) that communicate information to small retailers, such as new product launches, and information that may affect their business. The retail trade press has previously been demonstrated to provide valuable insights into arguments used by the tobacco industry concerning the PoS law and other tobacco legislation and to frame tobacco issues for retailers [24]. We have therefore included an assessment of retail trade press commentaries on the PoS law.

Aims

The main aim was to provide an up-to-date assessment of small retailers' plans and intentions regarding the second phase of tobacco PoS display removal in two geographically distinct, disadvantaged areas in England. The study also aimed to assess e-cigarette displays at point of sale and longer term plans of retailers with regard to tobacco, and pending or potential regulatory changes. There were five initial aims:

- To identify preparations by small retailers in England for tobacco PoS display removal and to assess tobacco industry support in this area
- To identify attitudes among small retailers to tobacco control regulations
- To assess current display of e-cigarettes at point of sale and to assess plans for when tobacco PoS displays are covered
- To identify options for small retailers to disinvest from tobacco sales
- To assess type and accuracy of communications on tobacco PoS display removal and other regulations in the retail trade press

Methods

Identifying the small shops

Tobacco retailers in three wards in Newcastle upon Tyne and five wards in London were identified. The wards were in boroughs chosen for convenience and to represent a predominance of low socio-economic populations. Separate cities were used to capture North-South differences, and the focus was on disadvantaged wards because of the higher smoking rates among disadvantaged groups [45]. Local maps and local retailer directories (Yell.com and www.192.com) initially identified shops selling tobacco to the public. Further shops were identified by walking systematically along the streets within the ward and visually identifying shops selling tobacco; a strategy that was used to assess the sale of smokeless tobacco in a previous study [46]. The 143 identified shops were then categorised by whether they were independent retailers, part of a local chain, part of a franchise or part of a national chain. Nine retailers refused permission to carry out an audit: three of these were chain shops and six were independent retailers. In total, audits were completed for 134 shops, 72 from London and 62 from Newcastle upon Tyne.

Retailer audits

Audits were carried out between August and October 2014 and involved recording a range of observations including: type of shop, type and size of the tobacco PoS display, prominent tobacco brands, smoking related products (SRPs), displays of NCPs, such as NRT and e-cigarettes, quitting signage, and other noticeable features of the tobacco display. The full range of items covered by the audit can be found in Box 1. Three researchers carried out the audits.

Arranging the interviews

Following the audit, researchers asked to speak to the owner or manager. If they were not available an appointment was made for a subsequent visit. For some retailers three visits were necessary before it was possible to speak to the owner or manager. The owner or manager (and on four occasions the owner's son) was provided with information about the research in both verbal and written form and then offered a cooling off period between this first contact and the interview, to give them time to read the information sheet in order to make an informed decision about participation. Written consent for participation was collected, and retailers were given a small inconvenience payment for participating. There were two occasions where the interviews were conducted with someone other than the owner, the owner's son or the manager, and in both cases these were people with knowledge and experience in that particular shop.

The aim was to interview between 25 and 50 retailers per city, from a range of shops (independent, multiple, forecourt etc). Interviews were stopped at 30 in London and 32 in Newcastle upon Tyne partly due to the time consuming nature of organising the interviews, but also because data saturation was reached. There were 19 shops that were part of national supermarket chains but small enough to still have an open tobacco PoS display. In these shops it proved difficult to secure interviews with managers and researchers were often referred to the chain's head office.

Retailer interviews

Interviews took approximately 20 minutes and included: the retailers' plans for the PoS law, details about what kind of support they have received, whether their display was serviced, their sales and plans concerning e-cigarettes, their awareness of standardised packaging legislation, and their views towards disinvesting from tobacco sales. There was an opportunity for the retailer to add anything else at the end of the interview. The full range of questions can be found in Box 1. The interviews were carried out by two researchers. The responses were noted in writing.

Selection of retail trade press and coverage

We had originally proposed analysing popular retail magazines which were held by Action on Smoking & Health offices, namely: The Grocer and Convenience Store Magazine. Two further magazines were additionally sourced: Asian Trader, as a result of comments from retailers during the interviews, and Forecourt Trader Online which was identified by researchers during an online search. These magazines have wide circulation (Asian Trader = 41,034, Convenience Store = 40,427, The Grocer = 30,397, Forecourt Magazine – paper = 10,000, Forecourt Magazine – online = 12,082). For comparison, The Guardian circulation is estimated at 185,313. Magazines published (online and hard copy) between April 2014 and September 2014 were visually scanned for any references to tobacco.

Data analysis

Audit and interview analysis

The audit and interview data were entered into a database with the data being entered and checked by the researcher who conducted the interview before being checked again by a second researcher. The data were quantified where appropriate to generate frequencies, for example on type of shop, type of display, tobacco industry gantry ownership and other variables detailed in Box 1.

With the more qualitative information including attitudes toward tobacco control legislation or thoughts about disinvestment, we drew out common themes that were recorded and coded when present.

Retail trade press analysis

Once identified as having a reference to tobacco, the articles were coded according to publication, type of article (advert, editorial, feature, interview), provenance where identifiable (i.e. whether they were funded by any tobacco manufacturers) and a range of key issues including: attitude towards tobacco control legislation (PoS law and standardised packaging), type and accuracy of information concerning the PoS law; sources of support and advice for retailers to implement the PoS law; any mention of illicit tobacco; quotes or input from the tobacco industry, retail or public health fields or; references to tobacco as a public health issue. The full list can be found in Box 2. Methods were similar to those used in previous studies assessing PoS laws [24, 47].

Box 1. Variables measured in the retailer audits and interviews

Audits	Retail Interviews
City, London or Newcastle	Are they aware of point of sale display legislation (PoS law)
Type of Shop (independent, local chain, franchise, national chain)	Do they know when it's being implemented
Age of sale sign displayed	Have they planned for removing the tobacco display
Tobacco point of sale display position	If so, what are those plans
Tobacco point of sale display type	Will the display be changed by the tobacco industry
Tobacco point of sale display size	Do they have a price list, or do they have plans for a price list
Noticeable features of the tobacco point of sale display	Have they been given advice about the PoS law
Does anything make the tobacco stand out	If so what advice, if not do they expect to receive advice
Prominent brands of tobacco	Have they been given any financial or other support about the PoS law
Is alcohol displayed alongside the tobacco	If so what support, if not do they expect to receive any support
Are nicotine containing products (NCPs) displayed	Would they like any further information about the PoS law, if so what information would they like
Are E-cigarettes displayed	Is their display serviced for them
Are Nicotine Replacement Products (NRPs) displayed	If so, who services the display
Where are NCPs and NRPs displayed?	How often do tobacco representatives (reps) visit
Which brands of E-cigarette are displayed	What do tobacco reps do on visits
Are Smoking Related Products (SRPs) are displayed	Does the rep require the display to look a certain way
Which type of SRP is displayed	Are they given any incentive for the display
Which brands of SRP are displayed	If so, what incentives are they given
Are e-cigarettes advertised	Did the tobacco rep provide them with the display
Is there any quitting signage displayed	Are they visited by other tobacco manufacturers
	If so, who, how often and do they also have requirements or incentives
	Do they get visits from NCP reps (including e-cigarettes)
	If so, who, how often and do they also have requirements or incentives
	Do they get visits from SRP reps
	If so, who, how often and do they also have requirements or incentives
	Which brands of e-cigarette do they sell and why
	Have they noticed any change in e-cigarette demand
	Do they have any future plans for e-cigarette retail
	How long have they sold tobacco
	How reliant are they on tobacco sales
	Is this reliance because of sales or because of footfall
	Are they interested in disinvestment from tobacco sales
	Why are they reliant on tobacco
	How much profit do they make from tobacco sales (profit margin)
	Have they noticed any changes tobacco sales or profit
	Are they aware of standardised packaging proposals
	Do they think it would be better if retailers were required to have a licence to sell tobacco as in Ireland and Scotland
	Any further comments

Box 2. Variables measured in the articles taken from the retail trade press

Retail Trade Press
Which publication has the article come from
What kind of article is it (advert, news article, feature or new product announcement)
Is the article funded by anyone? If so – who
What type and brand of tobacco does the article refer to
Does the article mention tobacco point of sale display legislation (PoS law)
Is the article positive or negative about PoS law
Is the information about the PoS law accurate
Articles that mention standardised packaging legislation
Is the article positive of negative about standardised packaging legislation
Are there quotes or other types of input from the tobacco industry
Are there quotes or other types of input from trade reps
Are there quotes or other types of input from the public health field
Does the article refer to the economics of tobacco retail
Does the article refer to illicit trade in tobacco
Does the article refer to price marked packaging
Does the article refer to the tobacco industry offering to help retailers
Does the article refer to tobacco as a public health issue
Does the article refer to failures or successes in international tobacco control legislation
Does the article refer to underage smoking
Does the article refer to the “dark market”
Does the article mention tobacco as a driver for “footfall”
Does the article refer to tobacco control legislation leading to crime
Does the article refer to smoking cessation?

Results

Audit Results

Sample characteristics and description of existing tobacco point of sale displays

There were 134 retailers audited; the majority of retailers (60%) were independent with 8% being part of local chains running a small number of shops, 18% were franchises and 14% were national chains (Table 1). Newcastle had fewer independent shops than London.

Ninety seven per cent of retailers housed the tobacco directly behind the counter. The most common gantry was a purpose built cabinet (93%); six housed the tobacco on general shop shelving and two shops had installed automatic vending machines which dispense tobacco as required by the retailer using an electronic keypad [47]. Only three retailers had already made their tobacco PoS display compliant; two used shutters and one was a specialist tobacco shop that dispensed products through a window. Ninety three per cent had a visible age of sale sign; all shops without an age of sale sign were in London. The size of the tobacco PoS display was either 1m, 1.5m or 2m, with 1m displays being the most common. Twenty six per cent of shops had visible e-cigarette advertisements. Thirteen per cent of shops had either quit smoking signs or the quit smoking number visible; these were commonly on small brand notices on top of the gantries, most were in Newcastle.

Table 1. Sample characteristics and existing tobacco point of sale display (N=134)

Variable	**% (n) All (n=134)**	% (n) Newcastle (n=62)	% (n) London (n=72)
Type of shop			
Independent	**60.4 (81)**	40.3 (25)	77.8 (56)
Local chain	**7.5 (10)**	14.5 (9)	1.4 (1)
Franchise	**17.9 (24)**	25.8 (16)	11.1 (8)
National chain	**14.2 (19)**	19.4 (12)	9.7 (7)
Is an age of sale sign displayed?			
Sign displayed	**93.3 (125)**	100 (62)	87.5 (63)
Sign not displayed	**5.2 (7)**	0 (0)	9.8 (7)
Data missing	**1.5 (2)**	0 (0)	2.8 (2)
Tobacco point of sale display position			
Directly behind the counter	**97 (130)**	98.4 (61)	95.8 (69)
To the side	**2.3 (3)**	0 (0)	4.2 (3)
Specialist tobacco shop	**0.7 (1)**	1.6 (1)	0 (0)
Tobacco point of sale display type			
Purpose built cabinet	**93.3 (125)**	96.8 (60)	90.3 (65)
Shop shelving	**4.5 (6)**	1.6 (1)	6.9 (5)
Automatic vending machine	**1.5 (2)**	0 (0)	2.8 (2)
Other	**0.7 (1)**	1.6 (1)	0 (0)
Is the tobacco point of sale display already compliant?			
Compliant*	**2.2 (3)**	1.6 (1)	2.8 (2)
Not compliant	**97.8 (131)**	98.4 (61)	97.2 (70)
Size of tobacco point of sale display			
1m	**43.3 (58)**	40.3 (25)	45.8 (33)
1.5m	**35.1 (47)**	30.6 (19)	38.9 (28)
2m	**20.1 (27)**	27.4 (17)	13.9 (10)
N/A**	**1.5 (2)**	1.6 (1)	1.4 (1)
Other			
E-cigarette advertising visible	**26.1 (35)**	27.4 (17)	25.0 (18)
Any quitting signage visible	**12.7 (17)**	22.6 (14)	4.3 (3)

* Two shops used shutters, one was a specialist tobacco shop

** One shop was a specialist tobacco retailer. Another retailer just displayed a few packets on a shop shelf

Prominent cigarette brands

Twenty five different cigarette brands were prominently displayed (Table 2). This included brands that were in the centre of the display, at eye level or more prominent in other ways. Some shops had displays of new tobacco products such as a new range of Cutters Choice rolling tobacco that hung from the gantry on a strip. The most common prominently displayed brand overall was Sterling (in 33% of shops). In Newcastle, Lambert and Butler was the most prominent (in 60% of shops), and in London, Mayfair was the most prominent (in 36% of shops).

Table 2. Prominent brands in tobacco point of sale displays (N=134)

Tobacco brand	Manufacturer	**% (n) All (n=134)**	% (n) Newcastle (n=62)	% (n) London (n=72)
Cigarette Brands				
Sterling	JTI / Gallaher	**32.8 (44)**	40.3 (25)	26.4 (19)
Lambert and Butler	Imperial	**29.9 (40)**	59.7 (37)	4.2 (3)
Richmond	Imperial	**26.1 (35)**	33.9 (21)	19.4 (14)
Mayfair	JTI / Gallaher	**23.9 (32)**	9.7 (6)	36.1 (26)
John Player Special	Imperial	**20.9 (28)**	27.4 (17)	15.3 (11)
Marlboro	Philip Morris	**18.7 (25)**	14.5 (9)	22.2 (16)
Sovereign	JTI / Gallaher	**15.7 (21)**	16.1 (10)	15.3 (11)
Berkeley	JTI / Gallaher	**14.2 (19)**	25.8 (16)	4.2 (3)
Windsor	Imperial	**9.7 (13)**	11.3 (7)	8.3 (6)
Players	Imperial	**6.7 (9)**	4.8 (3)	8.3 (6)
Pall Mall	BAT	**4.5 (6)**	0 (0)	8.3 (6)
Silk Cut	JTI / Gallaher	**4.5 (6)**	1.6 (1)	6.9 (5)
Embassy	Imperial	**3 (4)**	1.6 (1)	4.2 (3)
Carlton	Imperial	**2.2 (3)**	1.6 (1)	2.8 (2)
Camel	JTI / Gallaher	**1.5 (2)**	0 (0)	2.8 (2)
Chesterfield	Philip Morris	**0.7 (1)**	0 (0)	1.4 (1)
Lucky Strike	BAT	**0.7 (1)**	0 (0)	1.4 (1)
Rothmans	BAT	**0.7 (1)**	0 (0)	1.4 (1)
Winston	JTI / Gallaher	**0.7 (1)**	0 (0)	1.4 (1)
Superkings	Imperial	**0.7 (1)**	0 (0)	1.4 (1)
Rolling Tobacco Brands				
Amber Leaf	JTI / Gallaher	**14.2 (19)**	19.4 (12)	9.7 (7)
Drum	Imperial	**2.2 (3)**	0 (0)	4.2 (3)
Cutters Choice	BAT	**1.5 (2)**	0 (0)	2.8 (2)
Holborn	JTI / Gallaher	**0.7 (1)**	0 (0)	1.4 (1)
GV	Imperial	**0.7 (1)**	0 (0)	1.4 (1)

JTI = Japan Tobacco International
BAT = British American Tobacco

Other products displayed at the point of sale

Alcohol displays were next to the tobacco PoS display in 73% of shops (Table 3); although alcohol was more commonly situated next to tobacco in London than in Newcastle. NCPs were displayed in 84% of shops. E-cigarettes were the most visible product (84%) with NRT displayed in just three shops (which also displayed e-cigarettes). E-cigarettes were displayed in a mixture of locations, most commonly on other shelving to the side of the tobacco PoS display or on the front counter. SRPs were displayed in 87% of shops and were most likely to be rolling papers, followed by filters and lighters. SRPs were mostly displayed on general shop shelving, either below or to the side of the tobacco PoS display (50%) or within the tobacco PoS display or gantry (38%). Two shops in London sold shisha pipes.

Table 3. Other products displayed alongside tobacco (N=134)

Other products displayed	**% (n) All (n=134)**	% (n) Newcastle (n=62)	% (n) London (n=72)
Where is alcohol displayed?			
Alongside the tobacco	**73.1 (98)**	64.5 (40)	80.6 (58)
Elsewhere / not sold	**26.9 (36)**	35.5 (22)	19.4 (14)
Are NCPs* displayed?			
All NCPs	**84.3 (113)**	87.1 (54)	81.9 (59)
Nicotine replacement therapies	**2.2 (3)**	1.6 (1)	2.8 (2)
E-cigarettes	**84.3 (113)**	87.1 (54)	81.9 (59)
Where are e-cigarettes displayed (n=113)			
On the counter	**33.6 (38)**	22.2 (12)	44.1 (26)
In the tobacco point of sale display / gantry	**13.3 (15)**	22.2 (12)	5.1 (3)
On other shop shelving	**44.2 (50)**	44.4 (24)	44.1 (26)
Other / multiple locations	**8.8 (10)**	11.1 (6)	6.8 (4)
Which SRPs are displayed?**			
All SRPs	**86.6 (116)**	93.5 (58)	80.6 (58)
Lighters	**54.5 (73)**	62.9 (39)	47.2 (34)
Rolling papers	**76.1 (102)**	85.5 (53)	68.1 (49)
Filters	**67.2 (90)**	80.6 (50)	55.6 (40)
Rolling machines	**9.7 (13)**	19.4 (12)	4.2 (3)
Matches	**5.2 (7)**	9.7 (6)	2.8 (2)
Shisha pipes	**1.4 (2)**	0 (0)	2.8 (2)
Where are SRPs displayed? (n=116)			
On the counter	**2.6 (3)**	3.4 (2)	1.7 (1)
In the tobacco point of sale display / gantry	**37.9 (44)**	34.5 (20)	41.4 (24)
On other shop shelving	**50.0 (58)**	56.9 (33)	43.1 (25)
Other / multiple locations	**9.5 (11)**	5.2 (3)	13.8 (8)

* NCPs = Nicotine Containing Products

** SRPs = Smoking Related Products

Brands of e-cigarette

There were 25 different brands of e-cigarettes visible on display (Table 4). Blu was most visible overall, and was displayed in 29% of shops. Blu was also the most visible brand in shops in Newcastle, with Gamucci the most visible in London.

Table 4. Brands of e-cigarette visible on display (N=134)

E-cigarette brand	**% (n) All (n=134)**	% (n) Newcastle (n=62)	% (n) London (n=72)
Blu*	**29.1 (39)**	40.3 (25)	19.4 (14)
Vype*	**19.4 (26)**	22.6 (14)	16.7 (12)
Njoy	**19.4 (26)**	17.7 (11)	20.8 (15)
Gamucci	**15.7 (21)**	4.8 (3)	25.0 (18)
E-lites*	**15.7 (21)**	22.6 (14)	9.7 (7)
Ten Motives	**10.4 (14)**	17.7 (11)	4.2 (3)
Nicolites*	**9.7 (13)**	8.1 (5)	11.1 (8)
Vivid	**7.5 (10)**	9.7 (6)	5.6 (4)
Neo	**7.5 (10)**	0 (0)	13.9 (10)
OK	**6.0 (8)**	1.6 (1)	9.7 (7)
i-Puff	**5.2 (7)**	11.3 (7)	0 (0)
E-Shisha	**4.5 (6)**	4.8 (3)	4.2 (3)
Go-Lites	**3.0 (4)**	1.6 (1)	4.2 (3)
XPS	**2.2 (3)**	4.8 (3)	0 (0)
Craze	**2.2 (3)**	0 (0)	4.2 (3)
Vapestick	**1.5 (2)**	0 (0)	2.8 (2)
Shishee	**1.5 (2)**	3.2 (2)	0 (0)
MyCigz	**1.5 (2)**	0 (0)	2.8 (2)
Magick	**1.5 (2)**	0 (0)	2.8 (2)
VIP	**1.5 (2)**	3.2 (2)	0 (0)
Diamond Mist	**1.5 (2)**	3.2 (2)	0 (0)
Lebara	**1.5 (2)**	1.6 (1)	1.4 (1)
Royal Hill	**1.5 (2)**	0 (0)	2.8 (2)
Prestige	**0.7 (1)**	1.6 (1)	0 (0)
Mr Vapour	**0.7 (1)**	1.6 (1)	0 (0)

* Tobacco industry owned brands

Brands of smoking related products

Rizla (predominantly rolling papers) was the most visible SRP (Table 5) followed by Swan (predominantly filter tips). Rizla was the most visible in both London and Newcastle. Zig Zag (rolling papers) was also commonly visible in Newcastle but not in London, and conversely Raw (rolling papers) was commonly visible in London but not in Newcastle.

Table 5. Brands of smoking related products visible on display (N=134)

Smoking related product brand	**% (n) All (n=134)**	% (n) Newcastle (n=62)	% (n) London (n=72)
Rizla (rolling papers)	**74.6 (100)**	85.5 (53)	65.3 (47)
Swan (filter tips, rolling papers and matches)	**60.4 (81)**	64.5 (40)	56.9 (41)
Clipper (lighters)	**29.9 (40)**	17.7 (11)	40.3 (29)
Zig Zag (rolling papers)	**21.6 (29)**	45.2 (28)	1.4 (1)
Raw (rolling papers)	**14.9 (20)**	0 (0)	27.8 (20)
Blunt (rolling papers)	**6.7 (9)**	8.1 (5)	5.6 (4)
Job (rolling papers)	**2.2 (3)**	4.8 (3)	0 (0)
Ronson (lighters)	**1.5 (2)**	0 (0)	2.8 (2)
Zippo (lighters)	**1.5 (2)**	0 (0)	2.8 (2)
Sheesha Pipes (water pipes)	**1.5 (2)**	0 (0)	2.8 (2)
Mascotte (rolling papers, lighters and rolling machines)	**1.5 (2)**	4.8 (3)	0 (0)
Pako (lighters)	**0.7 (1)**	0 (0)	1.4 (1)

Interview Data

Sample characteristics

There were 32 interviews conducted in Newcastle and 30 conducted in London (Table 6). Around two-thirds of the interviews were with independent retailers, whilst 8% were part of a local chain and 24% were part of a franchise. Most interviewees were owners, followed by managers, but on four occasions in Newcastle, the owner's son was interviewed. There were two occasions where the interviews were conducted with someone other than the owner, the owner's son or the manager, and in both cases these were people with knowledge and experience in that particular shop. More managers than owners were interviewed in London than in Newcastle. No interviews were conducted with the 19 national chain stores in the wards because all national chains referred us to their head offices.

Table 6. Location, shop type and interviewee data (N=62)

Variable	**% (n) All (n=62)**	% (n) Newcastle (n=32)	% (n) London (n=30)
City			
Newcastle	**51.6 (32)**	100 (32)	0 (0)
London	**48.4 (30)**	0 (0)	100 (30)
Type of shop			
Independent	**67.7 (42)**	50.0 (16)	86.7 (26)
Local Chain	**8.1 (5)**	12.5 (4)	3.3 (1)
Franchise	**24.2 (15)**	37.5 (12)	10.0 (3)
National Chain	**0 (0)**	0 (0)	0 (0)
Who was interviewed?			
Owner	**71.0 (44)**	75.0 (24)	66.7 (20)
Owner's son	**6.5 (4)**	12.5 (4)	0 (0)
Manager	**19.4 (12)**	12.5 (4)	26.7 (8)
Other	**3.2 (2)**	0 (0)	6.7 (2)

Awareness of tobacco point of sale legislation

The vast majority of retailers were aware of the PoS law (Table 7). Only 7% were not aware. Just over half all retailers, 52%, were aware that the PoS law was due to be implemented by April 2015; 34% were only aware of the year and 15% were unaware of the year or date. Eighty-one per cent already had plans concerning how they were going to cover the tobacco PoS display. The tobacco industry was changing the display in 60% of retail premises and some retailers commented that companies such as Imperial had already started the process of refitting the gantry by installing fixings for shutters. Others were confident that the tobacco industry representatives (reps) would organise something closer to the time. No retailers had prepared a price list at the time of interviewing; many saying that prices will have changed by then and that the tobacco industry reps might provide them with a list. Others commented that their customers know what they want so they wouldn't need a price list.

Many (69%) had received advice about the PoS law and 27% had been given financial or other support. This advice and support included letters, phone calls and tobacco industry rep visits. Gallaher, British American Tobacco (BAT), Imperial, Japan Tobacco International (JTI) and Philip Morris were cited as providing information. Others mentioned the Commonsense Alliance and the retail trade press, specifically Asian Trader and Convenience store magazine. Two retailers mentioned the government or the local council as providing information. Over 90% of retailers either received help or were expecting help from the tobacco industry. However, 27% had had their gantry signed back to them from the tobacco industry, meaning that they would now have to pay for changes required by the PoS law.

Fifty per cent said they would still like more information on the PoS law, with numbers equally split between wanting general information and wanting specific guidance on becoming regulation compliant.

Table 7. Issues concerning tobacco PoS law (N=62)

Variable	% (n)
Was the retailer aware of tobacco point of sale legislation (PoS law)?	
Aware	93.5 (58)
Not aware	6.5 (4)
Was the retailer aware of the implementation date?	
Yes - April 2015	51.6 (32)
2015 (not sure of the month)	33.9 (21)
Don't know year or month or not aware	14.5 (9)
Had the retailer made plans for the PoS law	
Plans made	85.5 (53)
No plans	14.5 (9)
Is the tobacco industry or the retailer changing the tobacco point of sale display?	
Display being changed by the tobacco industry	59.7 (37)
Display not being changed by the tobacco industry	35.5 (22)
Not stated	4.8 (3)
Advice and support concerning the PoS law.	
Has been given advice about the PoS law	69.4 (43)
Expect to receive advice	25.8 (16)
Have been given financial or other support	27.4 (17)
Expect to receive financial or other support	62.9 (39)
Would the retailer like further information?	
Yes - would like information	50 (31)
No - would not like further information	50 (31)
If so, what information would they want? (n=31)	
General information	38.7 (12)
Specific information about the requirements	38.7 (12)
Unsure	19.4 (6)
Information about tax implications	3.2 (1)
Has the tobacco point of sale display been signed over to the retailer?	
Yes	27.4 (17)
No	66.1 (41)
Unsure	6.5 (4)

Plans to cover the tobacco point of sale display

The most popular method for covering the tobacco PoS display was by using shutters or a sliding door to cover the existing display with 63% of retailers planning to do this (Table 8). There were 13% of retailers intending to cover the display but who had not yet decided how and 15% retailers who did not at the time of interview have any plans. One retailer intended to install an automatic vending machine. In cases where the tobacco industry was paying for the changes, the solution was almost always installing shutters or sliding doors (89%). Where the retailers were making the changes a range of options were considered although 23% of these had no existing plans. One retailer was intending to remove the tobacco PoS display entirely as part of re-fitting as a mobile phone shop; this was not however being done in response to the PoS law.

Table 8. Plans for implementing PoS law (N=62)

			Plans broken down by who is paying for the change	
Method of covering the tobacco point of sale display	**% (n) All (n=62)**	% (n) Tobacco industry (n = 37)	% (n) Retailer (n=22)	% (n) Not Stated (n=3)
Cover existing display with shutters or a sliding door	**62.9 (39)**	89.2 (33)	22.7 (5)	33.3 (1)
Cover the existing display in another way	**4.8 (3)**	0 (0)	13.6 (3)	0 (0)
Cover the existing display but haven't decided how	**12.9 (8)**	2.7 (1)	27.3 (6)	33.3 (1)
Install an automatic vending machine	**1.6 (1)**	0 (0)	4.5 (1)	0 (0)
Remove the display completely and put it somewhere else	**1.6 (1)**	0 (0)	4.5 (1)	0 (0)
Remove the tobacco completely	**1.6 (1)**	0 (0)	4.5 (1)	0 (0)
N/A - No plans	**14.5 (9)**	8.1 (3)	22.7 (5)	33.3 (1)

Views on PoS law and standardised packaging legislation

Most (68%) of the retailers interviewed were ambivalent or had no opinion about the PoS law (Table 9), 27% were negative and 3% positive about the legislation. Negative opinions included concern about the hassle of the shutters, concern about repetitive strain injury for staff and worry about an increase in illicit trade. Two retailers were positive about the POS law; one said that all tobacco should be out of sight; the other was concerned about passive smoking for children in public places and hoped that the PoS law would help to prevent this. When discussing standardised packaging, 53% were negative about the legislation, 26% ambivalent and 7% positive about it; there were nine retailers (15%) who were unaware of standardised packaging.

A common theme among retailers was underage smoking, and this concern was often directed at government. Retailers said that the government should be focussing on underage smoking rather than on standardised packaging or tobacco PoS displays. Some retailers thought that the government should focus on illicit tobacco rather than tobacco PoS displays; this was a concern for 22% of the retailers.

Another common theme in the interviews was also that “smokers will smoke anyway so why bother with legislation?” These retailers said that standardised packaging or tobacco PoS display changes would not make any difference to someone who wanted to buy cigarettes.

Table 9. Attitudes towards tobacco control measures (N=62)

Variable	% (n)
Retailers' view on tobacco point of sale legislation	
Negative	27.4 (17)
Positive	3.2 (2)
Ambivalent / no opinion	67.7 (42)
N/A - Unaware of the legislation	1.6 (1)
Retailers' view on standardised packaging	
Negative	53.2 (33)
Positive	6.5 (4)
Ambivalent / no opinion	25.8 (16)
N/A - Unaware of the legislation	14.5 (9)

Tobacco point of sale display servicing and ownership

Nearly all the tobacco PoS displays had been originally provided by the tobacco industry, although two retailers were unsure (Table 10). Over a quarter of retailers (27%) had had their display signed back to them recently, meaning that the tobacco industry rep would no longer service their display or pay for any changes required by the PoS law. The vast majority of retailers (84%) said that their displays were serviced by the tobacco industry: Imperial serviced most displays (50%) followed by Gallaher / JTI (42%). Most (65%) reps visited on a monthly basis, 81% required the display to look a certain way and 21% offered incentives to retailers for hosting the display. The requirements were mostly to ensure that the rep's company's cigarettes were prominently displayed, some retailers were given a planogram stipulating the tobacco brand positioning. Incentives ranged from a £300 cash incentive for extending a display contract for three years, to a points system and occasional free stock. Some retailers also noted that the reps checked tobacco prices to make sure that those prices were up to date.

Table 10. Tobacco point of sale display servicing (N=62)

Variable	% (n)
Did the tobacco industry provide the shop with the tobacco point of sale display?	
Yes	90.3 (56)
No	6.5 (4)
Unsure*	3.2 (2)
Is the tobacco point of sale display serviced by a tobacco industry rep?	
Serviced	83.9 (52)
Not serviced	16.1 (10)
Who services the display? (n=52)	
Imperial	50.0 (26)
Gallaher / JTI**	42.3 (22)
BAT***	1.9 (1)
Philip Morris	1.9 (1)
Unsure	3.8 (2)
How often do the reps visit? (n=52)	
Fortnightly	5.8 (3)
Monthly	65.4 (34)
6-8 weeks	11.5 (6)
Quarterly	1.9 (1)
Every 6 months or less often	15.4 (8)
Does the rep offer incentives? (n=52)	
Incentives given	21.2 (11)
No incentives given	76.9 (40)
Unsure	1.9 (1)
Does the rep require the tobacco point of sale display to look a certain way? (n=52)	
Yes	80.8 (42)
No	19.2 (10)

* Some retailers bought the shop with the tobacco point of sale display already installed

** JTI = Japan Tobacco International

*** BAT = British American Tobacco

Other tobacco rep activity

More than one tobacco manufacturer visited 70% of retailers. The second rep was most commonly from Imperial, followed by BAT (Table 11). Four retailers reported that these manufacturers (9%) had requirements about where the products were placed, and 14% reported that these other manufacturers offered incentives such as vouchers for future purchases or discounts on current purchases.

Table 11. Other tobacco rep visits (N=62)

Variable	% (n)
Is the retailer visited by other tobacco manufacturers?	
Yes	69.4 (43)
No	30.6 (19)
Which other manufacturers visit? (n=43)	
Imperial	34.9 (15)
BAT*	32.6 (14)
Gallaher	18.6 (8)
JTI**	11.6 (5)
Philip Morris	4.7 (2)
Hamlet	2.3 (1)
Hogarth	2.3 (1)
Pall Mall	2.3 (1)
Havanas	2.3 (1)
Scandinavian Tobacco Group (UK)	2.3 (1)
How often do the reps visit? (n=43)	
Fortnightly	4.7 (2)
Monthly	55.8 (24)
6-8 weeks	20.9 (9)
Every 6 months or less often	7.0 (3)
Irregular	7.0 (3)
Unsure	4.7 (2)
Does the rep offer incentives? (n=43)	
Yes	14.0 (6)
No	69.8 (30)
N/A	16.3 (7)
Does the rep have any requirements? (n=43)	
Yes	9.3 (4)
No	81.4 (35)
N/A	9.3 (4)

* BAT = British American tobacco

** JTI = Japan Tobacco International

Nicotine containing product rep activity

NCP reps visited 82% of the retailers, with Blu reps the most commonly reported, followed by E-Lites (Table 12). These visits were all from e-cigarette reps; there were no reported visits from NRT reps. In cases where the e-cigarette brand was tobacco industry owned, the e-cigarette and tobacco reps were always different people. Thirty four per cent of the reps offered incentives for displaying products and one had requirements about where to display the products. Incentives were reported to be free stock, samples or posters. Three of the five most commonly reported e-cigarette companies visiting shops were owned by the tobacco industry.

Table 12. Visits from nicotine containing product (NCP) reps (N=62)

Variable	% (n)
Does the retailer get visits from NCP reps?	
Yes	82.3 (51)
No	17.7 (11)
Which NCP companies visit? (n=51)	
Blu*	29.4 (15)
Njoy	21.6 (11)
E-lites*	19.6 (10)
Gamucci	11.8 (6)
Nicolites*	11.8 (6)
Neo	9.8 (5)
GoLites	7.8 (4)
SkyCigs	7.8 (4)
OK	5.9 (3)
Vapestick	5.9 (3)
Vivid	5.9 (3)
Vype*	3.9 (2)
Viper	2.0 (1)
VIP	2.0 (1)
E-Liquids	2.0 (1)
Vapor	2.0 (1)
iPuff	2.0 (1)
E-Shisha	2.0 (1)
How often do the reps visit? (n=51)	
Fortnightly	15.7 (8)
4-6 weeks	27.5 (14)
every 6 - 8 weeks	13.7 (7)
Every 6 months or less often	13.7 (7)
Didn't specify or unsure	29.4 (15)
Does the NCP rep offer incentives? (n=51)	
Yes	37.3 (19)
No	62.7 (32)
Does the NCP rep have any requirements? (n=51)	
Yes	2.0 (1)
No	98.0 (50)

* Tobacco industry owned brands

Smoking related product rep activity

SRP reps visited 16% of retailers, with most (80%) of these being for rolling papers (Table 13). Nine out of the 10 reps did not offer incentives and nine out of 10 did not have requirements about the display of their products.

Table 13. Visits from smoking related product (SRP) reps (N=62)

Variable	% (n)
Does the retailer get visits from SRP reps	
Yes	16.1 (10)
No	83.9 (52)
Which type of SRP does the rep bring? (n=10)	
Rolling Papers	80.0 (8)
Filter tips	10.0 (1)
Lighters	10.0 (1)
How frequent does the SRP rep visit? (n=10)	
Monthly	40.0 (4)
Quarterly	20.0 (2)
Not regularly	40.0 (4)
Does the SRP rep have any requirements? (n=10)	
Yes	10.0 (1)
No	90.0 (9)
Does the SRP rep offer any incentives? (n=10)	
Yes	10.0 (1)
No	90.0 (9)

Sales of e-cigarettes

Of the retailers interviewed 27% commented that e-cigarettes were selling well, with 23% feeling ambivalent and 48% saying that e-cigarette sales were selling badly (Table 14). Forty four per cent were offered e-cigarettes on a "sale or return" basis, meaning that the retailer can return unsold units at no cost. Twenty six per cent of retailers intended to stop selling e-cigarettes; 15% had firm plans to continue selling them. Some retailers commented that customers were buying e-cigarettes from chemists or specialist e-cigarette shops instead of small shops. Some retailers said that sales had been good to start with but had either levelled off or fallen more recently.

Table 14. Sales of e-cigarettes (N=62)

Variable	% (n)
Retailers perceptions of e-cigarette demand	
Selling well	27.4 (17)
Neither well nor badly	22.6 (14)
Selling (or had sold) badly	50.0 (31)
Is the retailer offered "sale or return" from e-cigarette manufacturers	
Yes	43.5 (27)
No	56.5 (35)
Does the retailer have future plans for selling e-cigarettes?	
Plans to continue selling e-cigarettes	14.5 (9)
No specific plans	46.8 (29)
Plan to stop selling e-cigarettes	25.8 (16)
Did not say	12.9 (8)

Sales of tobacco

Many retailers had sold tobacco for a long time with 55% having sold tobacco for over 10 years. Some retailers were not sure how long their shop had sold tobacco because they had taken it over from another retailer (Table 15). Thirty one per cent of retailers reported falling tobacco sales and profit; others said that smokers were switching to cheaper brands or smaller packets. Some retailers thought that sales had gone down since smoking was banned in public places, with others highlighting a decline in the last year.

Eighty one per cent of retailers said that selling tobacco was a driver for footfall; ensuring that customers came into the shop who would then buy other products. However the vast majority of retailers (94%) said that there were low profit margins on tobacco.

Over 90% of retailers, when asked how reliant they were on tobacco sales said that tobacco was either important or very important to their business. Forty four per cent of retailers were not interested in reducing this reliance. However, 40% were interested in reducing their reliance on tobacco but just under half of these thought that it would not possible to do so. A further 16% simply reported that reducing reliance on tobacco would not be possible. Some retailers were worried that customers would go to other shops if they stopped selling tobacco.

The economic arguments for continuing to sell tobacco were common and ran through many interviews. One economic argument was that tobacco sales increased footfall and turnover; another was that the shop was simply supplying according to local demand. Other retailers talked about the importance of price marked packaging.

Reaction to a tobacco licensing system

There was a mixed reception to the idea of a tobacco licensing system with 19% of retailers supportive of the idea (Table 15). Some said that it might be good if it reduced either the illicit tobacco trade or underage smoking. Those opposed to the idea (31%) said it was a waste of time and that it was another way of charging retailers more money.

Table 15. Tobacco sales and reliance (N=62)

Variable	% (n)
How long have they sold tobacco?	
Under 1 year	1.6 (1)
1 - 5 years	16.1 (10)
6 - 10 years	11.3 (7)
11 - 20 years	21.0 (13)
21 - 30 years	24.2 (15)
over 30 years	9.7 (6)
Unsure or unstated	16.1 (10)
Have they noticed any changes in tobacco sales or profit?	
Reduced	30.6 (19)
Stayed the same	33.9 (21)
Increased	6.5 (4)
Unsure or unstated	4.8 (3)
Change in brands / pack size reduction	16.1 (10)
N/A	8.1 (5)
How reliant is their business on tobacco trade?	
Tobacco trade is very important for business	43.5 (27)
Tobacco trade is important for business	46.8 (29)
Ambivalent about tobacco trade	4.8 (3)
Tobacco trade is not important for business	4.8 (3)
Are they interested in reducing their tobacco reliance?	
Yes	22.6 (14)
Yes but not possible	17.7 (11)
Not possible	16.1 (10)
No	43.5 (27)
Tobacco as footfall	
Yes	80.6 (50)
No	19.4 (12)
Low profit margins on tobacco*	
Yes	93.5 (58)
No	6.5 (4)
Attitude towards a tobacco licensing system	
Against	30.6 (19)
Neither for nor against	19.4 (12)
For	19.4 (12)
Did not say or did not understand	30.6 (19)

*As described as "low" or under 10%

Retail Trade Press Results

Sample characteristics

There were 183 articles in total (Table 16). Seventy were from Forecourt Magazine, 66 from Convenience Store Magazine, 38 from Asian Trader and nine from The Grocer. Forty two per cent of articles were news stories, 27% were adverts, 12% were feature or opinion pieces and 20% were new product announcements. Most new product announcements constitute a form of advertising by alerting retailers to new products such as Marlboro rolling tobacco (Forecourt 03.10.14).

Most articles were about tobacco in general, but the most common form of tobacco mentioned was rolling tobacco, in 18% of articles. The tobacco manufacturer with the most adverts and new product announcements was JTI. One feature included a multiple page article on rolling tobacco ("Still Rocking and Rolling" – Convenience Store 29.8.14) and one feature included a multiple page article on general tobacco retail ("Tobacco Remains King in Convenience" – Asian Trader 12.09.14).

Table 16. Retail trade press article descriptions (N=183)

Variable	% (n)
Publication	
Forecourt Magazine	38.3 (70)
Convenience Store Magazine	36.1 (66)
Asian trader	20.8 (38)
The Grocer	4.9 (9)
Article Type	
News Article	41.5 (76)
Advert	26.8 (49)
New Product	20.2 (37)
Feature or Opinion	11.5 (21)
Product Type	
All tobacco (non-specific)	49.7 (91)
Rolling tobacco	18.0 (33)
Cigarettes	15.8 (29)
E-cigarettes	11.5 (21)
NRT	0.5 (1)
Other	4.4 (8)
Adverts according to brand (n=49):	
JTI*	34.7 (17)
Imperial	16.3 (8)
BAT**	14.3 (7)
Philip Morris	8.2 (4)
Scandinavian Tobacco Group (UK)	6.1 (3)
Njoy ***	4.1 (2)
Blu ***	4.1 (2)
Holborn	2.0 (1)
Ritmeester	2.0 (1)
Prestige Vaping ***	2.0 (1)
Vivid ***	2.0 (1)
Diamond Mist***	2.0 (1)
Neo ***	2.0 (1)
New products according to company / brand (n=37)	
JTI	27.0 (10)
Imperial	24.3 (9)
Philip Morris	21.6 (8)
Scandinavian Tobacco Group (UK)	8.1 (3)
BAT	5.4 (2)
Ritmeester	5.4 (2)
Vype ***	2.7 (1)
V2 ***	2.7 (1)
Henri Wintermans	2.7 (1)

* JTI = Japan Tobacco International

** BAT = British American tobacco

*** E-cigarettes

Attitude towards tobacco control legislation

Forty articles referred to the PoS law (Table 17). Fifty per cent of these were ambivalent or showed no opinion, 45% were negative and 5% were positive about the PoS law. Both of the positive articles were news stories about retailers who had moved the tobacco PoS display out of sight and increased their profits by displaying goods with large profit margins behind the counter. Thirty three articles referred to standardised packaging, 94% of these were negative, 6% were ambivalent or showed no opinion, and none were positive in tone. Negative articles included an interview with Nigel Farage stating that tobacco control legislation was *"barmy"* ("Nigel Says "No" to Tobacco Plain Packaging" – Asian Trader, 26.09.2014), another article interviewed traders, one saying:

"I am not happy about it because they get so much money from cigarettes so I don't understand why the government wants to implement the tobacco display ban. They should do something else about it such as ban people from smoking outside and buying cigarettes for their kids" [1] ("Me and My Store" – Asian Trader, 10.10.2014)

Other articles said that the tobacco industry had helped retailers to prepare for the difficulties of "*going dark".* One article in Asian Trader urged retailers to protest about standardised packaging legislation but encompassed tobacco PoS displays too ("Retailers Must Act in Plain Packaging Standstill" – Asian Trader 12.09.15).

Articles opposing standardised packaging were more direct in their opposition than articles about the PoS law. Some articles mentioned the current (at the time) government consultation on standardised packaging as an opportunity for retailers to protest. Other articles reported on trade groups lobbying the government against standardised packaging legislation.

[1] A consultation on proxy purchasing legislation is underway at the time of writing (17th December 2014 to 28th January 2015)

Table 17. Tobacco control legislation references in retail trade press (N=183)

Variable	**% (n) All (n=183)**	% (n) Advert (n=49)	% (n) News Article (n=76)	% (n) Feature or Opinion (n=21)	% (n) New Product (n=37)
Does the article reference tobacco point of sale display legislation?					
Mentioned	**21.9 (40)**	2.0 (1)	28.9 (22)	71.4 (15)	5.4 (2)
Not mentioned	**78.1 (143)**	98.0 (48)	71.1 (54)	28.6 (6)	94.6 (35)
Attitude towards tobacco point of sale legislation (n=40)					
Positive	**5.0 (2)**	0 (0)	9.1 (2)	0 (0)	0 (0)
Neither positive nor negative	**50.0 (20)**	0 (0)	59.1 (13)	40.0 (6)	50.0 (1)
Negative	**45.0 (18)**	100 (1)	31.8 (7)	60.0 (9)	50.0 (1)
Does the article reference standardised packaging legislation?					
Mentioned	**18.0 (33)**	0 (0)	26.3 (20)	61.9 (13)	0 (0)
Not mentioned	**82.0 (150)**	100 (49)	73.7 (56)	38.1 (8)	100 (37)
Attitude towards standardised packaging (n=33)					
Positive	**0 (0)**	0 (0)	0 (0)	0 (0)	0 (0)
Neither positive nor negative	**6.1 (2)**	0 (0)	5.0 (1)	7.7 (1)	0 (0)
Negative	**93.9 (31)**	0 (0)	95.0 (19)	92.3 (12)	0 (0)

Tobacco point of sale legislation articles

Of the 40 articles that covered the PoS law, a third reported how the tobacco industry intends to help retailers to prepare for the change (Table 18).

"The conversion programme [for point of sale displays] which is costing Imperial "tens of millions of pounds" is set to be completed "long before the 6th April deadline" Imperial Tobacco UK communications manager Gayatri Barua-Howe told Convenience Store. (Imperial Ahead of Target with Display Ban Preparations – Convenience Store, 23.04.2014)

Ten per cent of articles referring to the PoS law were feature length. There were 22 news articles that referenced the PoS law of which 36% reported lobbying against tobacco control legislation. There were just two articles that covered the requirements of the PoS law in detail and both did so accurately, listing both requirements and possible solutions.

Table 18. Tobacco point of sale articles in retail trade press (N=40)

Variable	**% (n) All (n=40)**	% (n) Advert (n=1)	% (n) News Article (n=22)	% (n) Feature or Opinion (n=15)	% (n) New Product (n=2)
Tobacco point of sale article type					
Tobacco industry intending to help retailers	**32.5 (13)**	100 (1)	40.9 (9)	6.7 (1)	100 (2)
News about how people are preparing	**15.0 (6)**	0 (0)	13.6 (3)	20.0 (3)	0 (0)
News about anti-tobacco control lobbying	**20.0 (8)**	0 (0)	36.4 (8)	0 (0)	0 (0)
Other, mentions tobacco point of sale in passing	**7.5 (3)**	0 (0)	4.5 (1)	13.3 (2)	0 (0)
Opinion piece (interview, letter, poll)	**12.5 (5)**	0 (0)	0 (0)	33.3 (5)	0 (0)
Feature referencing tobacco point of sale as context	**10.0 (4)**	0 (0)	0 (0)	26.7 (4)	0 (0)
Enforcement article	**2.5 (1)**	0 (0)	4.5 (1)	0 (0)	0 (0)
Tobacco point of sale legislation accuracy					
Accurate with comprehensive detail	**5.0 (2)**	0 (0)	0 (0)	13.3 (2)	0 (0)
Accurate but limited in detail	**42.5 (17)**	100 (1)	40.9 (9)	40.0 (6)	50 (1)
No detail in the article	**52.5 (21)**	0 (0)	59.1 (13)	46.7 (7)	50 (1)

Quotes or input from the tobacco, trade or public health fields

Forty one per cent of all the articles identified contained input or quotes from tobacco industry reps (Table 19); 25% contained input from trade associations or from retailers; 5% contained input from people in the public health field and 43% contained no quotes from tobacco industry, trade or public health representatives (some articles contained quotes from more than one sector). One feature on rolling tobacco included a quote from Scandinavian Tobacco Group's (STG) head of marketing:

"Adult smokers will only be able to see a very limited portion of the gantry each time the shutters are opened to retrieve a product ….so the manufacturers will want to ensure that what customers do see stands out… the pricemarks on the packs look like becoming even more significant, particularly on RYO where packs are larger than cigarettes meaning that markings are also bigger and clearer."("Still Rocking and Rolling" – Convenience Store, 29.08.2014)

The most common theme in retail trade press articles was the economics of tobacco sales which was mentioned in 65% of articles. Six per cent of the articles mentioned tobacco as a driver of footfall, 29% mentioned price marked packaging and 20% talked about the tobacco industry giving advice or support to retailers. JTI ran a series of adverts informing retailers on how best to prepare for the tobacco PoS changes. This series was called ARTIST, which stands for the following:

"Availability, Range, Training, Innovation, Sales and Technology". ("Think Like a Tobacco ARTIST" – Convenience Store, 29.08.2014)

One article from this series emphasises the importance of the tobacco PoS display being well stocked with a wide range of products:

"Over 90% of existing adult smoker shoppers have already decided which tobacco brand they are going to purchase before they enter a store and if a preferred brand is out of stock, existing adult smokers may take their custom, including associated purchases, elsewhere" ("Think Like a Tobacco ARTIST" – Convenience Store, 25.04.2014)

An interview with Phillip Morris' UK and Ireland managing director Martin Inkster emphasised the importance of a good relationship with traders:

" 'We've established our own 'field force'. We started that earlier this year, we've now got a fully rolled out field force across the UK and they're in various stages of introducing themselves to retailers and developing those relationships.' Inkster believes these relationships are vital in a challenging market place. 'Relationships are fundamental to any success we will have in the future. So we will have full national retail coverage. We'll be looking to call on around 25,000 general trade and

independent retailers' he says" ("Leading the Quest for a Safer Cigarette" – Asian Trader, 10.10.2014)

Nine per cent of the articles referenced international tobacco control as having failed to reduce smoking. There were specific references to Australia. The successes of international tobacco control measures were not discussed in any of the articles.

Table 19. Other items from the retail trade press (N=183)

Variable	**% (n) All**	% (n) Advert (n=49)	% (n) News Article (n=76)	% (n) Feature or Opinion (n=21)	% (n) New Product (n=37)
Does the article contain any input or quotes from the following:					
From tobacco industry representatives (reps)	**41.0 (75)**	10.2 (5)	39.5 (30)	42.9 (9)	83.8 (31)
From trade industry reps	**24.6 (45)**	8.2 (4)	30.3 (23)	81.0 (17)	2.7 (1)
From public health reps	**4.9 (9)**	0 (0)	7.9 (6)	14.3 (3)	0 (0)
Article contains no quotes from tobacco industry, retail or public health	**42.6 (78)**	87.8 (43)	34.2 (26)	14.3 (3)	16.2 (6)
Frequency of references to the following:					
Economics of tobacco trade	**64.5 (118)**	49.0 (24)	64.5 (49)	81.0 (17)	75.7 (28)
Illicit tobacco trade	**32.2 (59)**	22.4 (11)	53.9 (41)	23.8 (5)	5.4 (2)
Price marked packaging	**29.0 (53)**	49.0 (24)	1.3 (1)	28.6 (6)	59.5 (22)
Tobacco industry giving advice and support to retailers	**20.2 (37)**	18.4 (9)	22.4 (17)	42.9 (9)	5.4 (2)
Tobacco as a public health issue	**9.8 (18)**	0 (0)	18.4 (14)	19.0 (4)	0 (0)
International failures of tobacco control (Australia)	**9.3 (17)**	0 (0)	18.4 (14)	14.3 (3)	0 (0)
International successes of tobacco control (Australia)	**0 (0)**	0 (0)	0 (0)	0 (0)	0 (0)
Underage smoking	**8.7 (16)**	4.1 (2)	14.5 (11)	9.5 (2)	2.7 (1)
"Dark market"	**6.0 (11)**	2.0 (1)	3.9 (3)	23.8 (5)	5.4 (2)
Footfall (tobacco as a driver of footfall)	**5.5 (10)**	4.1 (2)	0 (0)	28.6 (6)	5.4 (2)
Legislation leading to crime	**4.9 (9)**	0 (0)	6.6 (5)	19.0 (4)	0 (0)
Smoking cessation	**4.9 (9)**	0 (0)	7.9 (6)	14.3 (3)	0 (0)

Discussion

Summary of results

Between August and October 2014, displays of tobacco and related products were audited in 134 small retailers who sold tobacco products in three wards in Newcastle upon Tyne and five wards in London. A subsample of 62 retailers were then interviewed about the PoS law and wider issues pertaining to tobacco. We also conducted a review of popular retail trade press published between April and September 2014, to assess articles referring to tobacco including the PoS law.

Most retailers surveyed said that they were aware of and prepared for the PoS law, although a small minority were still uncertain about details of the legislation particularly the date of implementation. The main sources of information about the legislation were the tobacco industry and retail trade press. The Department of Health's awareness campaigns on the PoS law had not commenced during the period of study, thus this may explain why retailers' sources of information were predominantly the retail trade press and the tobacco industry. Many retailers said that the tobacco industry was paying for the costs of becoming compliant with the law. However, around a quarter said that their tobacco PoS display had been signed back to them and they would therefore be covering the costs of ensuring compliance with the legislation themselves.

For the majority of retailers surveyed, tobacco industry reps were visiting the retailers regularly to service the tobacco PoS displays, most commonly requiring tobacco to be displayed in a certain way so that their products were most prominent. This is similar to findings of earlier research [47]. The most popular solution to make displays compliant was by having shutters or sliding doors fitted; this solution means some exposure to tobacco packaging continues (including branding and price marked packs) when shutters are opened (compared with automated vending machines, drawers or overhead gantries for example). The level of tobacco PoS display exposure could vary in Scotland and Wales where the permitted visible area is smaller [48].

E-cigarettes were displayed in a variety of locations in most shops, with most retailers selling only a few brands. Three of the top five most prominently displayed brands were owned by the tobacco industry. Whilst a large majority of retailers were being visited by e-cigarette industry reps, only just over a quarter of the retailers surveyed believed that e-cigarettes were selling well. SRPs were displayed in most shops either on or around the tobacco PoS display and had much less industry involvement than tobacco.

Nearly all retailers acknowledged the low profit margins from cigarette sales, but around four out of five retailers believed that cigarette sales were a driver for footfall, that is, people who come in to buy cigarettes end up buying other products as well. Concerns were raised about the fall in tobacco sales/profits over time and 40% of retailers surveyed were interesting in reducing their reliance on tobacco.

When asked, nearly two-thirds of retailers were ambivalent or expressed no opinion on the PoS law. Retailers were disposed more negatively towards potential legislation to require standardised packaging of tobacco products. Around a fifth of retailers were in favour of a tobacco licensing system, requiring anyone selling tobacco to purchase a licence to do so.

We identified 183 tobacco articles in the four retail trade press journals we examined. Just under half of these (45%) portrayed a negative attitude towards the legislation, 5% were positive and half were neutral. All but two of the 33 retail trade press articles covering standardised packaging were negative, the remaining two were neutral.

A small majority (57%) of articles contained quotes from tobacco, retail or public health representatives. Of these articles, 72% contained quotes from the tobacco industry, eight times as many as contained quotes from the public health field (9%). Retail or trade reps were quoted in 43% of articles.

Limitations and strengths

The research was carried out in a convenience sample of wards from disadvantaged boroughs in Newcastle and London to reflect the higher smoking rates among disadvantaged groups [45] and hence may not be generalizable to other less disadvantaged wards or other parts of the country. However boroughs were chosen from a northern and southern city to enable geographic diversity and few differences, aside from popular cigarette and e-cigarette brands, were observed between the two boroughs. Findings from other UK research [47, 49] lead us to believe that tobacco retail practices in these wards was not unusual. Whilst the audits were carried out by three different researchers and the interviews were carried out by two different researchers, a standardised protocol was used to minimise any differences in methodologies and all researchers were skilled, experienced and trained by the lead researcher who initially accompanied visits to retail shops.

Sources of information identified by the retailers concerning the PoS law were predominantly tobacco industry and the retail trade press but the Department of Health's awareness campaigns on the PoS law had not commenced at the time of data collection. Activities such as the Department of Health's consultation on standardised packaging which were underway during the period of assessment of tobacco articles in the retail trade press may have biased the findings [50]. Not all retail trade press were audited, but the four that were included were the only ones mentioned by retailers when asked for sources of information; all four trade magazines had wide circulation figures.

This study has several strengths. Unlike previous studies [47] which mainly interviewed retail assistants, the current study included interviews predominantly with managers or owners, ensuring the views of those directly responsible for implementing the PoS law were captured. Retailers were also asked about a wider variety of issues than in previous studies, including a tobacco licensing system and their reliance on tobacco sales. Moreover, this is the first study that conducted retailer interviews in tandem with a review of the retail trade press, allowing us to compare the views voiced by retailers with articles being published in the retail trade press.

Recommendations

1. *Tobacco retail licensing system*: Around a fifth of retailers interviewed were in favour of a tobacco licensing system for tobacco products. The advantages and disadvantages of a licensing system should be explored further.
2. *Increase overall communication with tobacco retailers*: Given retailers' sources of information were predominantly the tobacco industry and retail trade press, there is an opportunity for governmental and non-governmental sectors to have greater dialogue with retailers about the rationale for tobacco control and tobacco control measures in general.
3. *Educate retailers about the upcoming PoS law*: Most small retailers have decided how to comply with the PoS law but there is still an opportunity to ensure that all retailers are aware of the implementation date and the range of potential solutions.
4. *Economic research on small retailer tobacco sales*: Retailers showed an interest in decreasing their reliance on tobacco sales and nearly all acknowledged that tobacco products have very small profit margins. At the same time, retailers believed that they were very reliant on tobacco sales. Given the limited number of studies in this area [51, 52], there is an opportunity for research to explore how tobacco retailers might disinvest from tobacco.
5. *Small retailers and health promotion*: There is an opportunity for small retailers to be health promoting. Large cities, including New York City, have developed programs to help retailers offer healthy products to their customers.
6. *E-cigarette sales*: A limited range of e-cigarettes were on sale in the small shops that were audited. Retailers seem to be cautious about potential future legislation and health consequences. Information and guidance on e-cigarettes may be helpful to retailers.

Conclusions

Most retailers surveyed were aware of and prepared for the forthcoming PoS law and had no strong opinions on it. The main sources of information about the PoS law were the tobacco industry and retail trade press. Retailers acknowledged the low profit margins on tobacco, perceived themselves to be reliant on tobacco sales but acknowledged that these were declining and a significant minority were interested in reducing their reliance on tobacco. There is therefore scope for greater dialogue with retailers about tobacco and tobacco control, profitability to retailers of tobacco sales and how they might diversify away from tobacco in the future.

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