

Tobacco Surveillance Data Brief: *Tobacco Marketing at the Point-of-Purchase*

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Point-of-Purchase Tobacco Marketing

Since the Master Settlement Agreement (MSA) in 1998, tobacco advertising and promotion has significantly increased in the retail environment (Wakefield et al., 2002). In fact, spending on retail marketing categories such as price discounts and point-of-purchase advertisements represents the largest tobacco marketing spending area, accounting for approximately 90% of tobacco company marketing expenditures in 2003 (FTC, 2005). Spending on these categories surpasses more familiar and researched marketing channels such as magazine advertising (only 1.0% of 2003 spending)(FTC, 2005). Furthermore, while the MSA placed restrictions on other marketing channels such as billboards, magazines and sponsorships, only two restrictions apply to retail advertising –bans on the use of cartoons in tobacco ads/products and on ads greater than or equal to 14 square feet in size (NAAG, 1998).

Point-of-purchase marketing may work to trigger smokers to purchase cigarettes, discourage smokers from quitting and encourage former smokers to resume smoking (Warner, 1986). In-store advertising may also influence children, who are known to regularly visit retail outlets such as convenience stores (Henriksen et al., 2004). This brief presents the results of a pilot assessment of tobacco advertising in New Jersey stores, using a convenience sample of 320 locations (approximately 10-15 stores in each of the 21 counties). Various types of point-of-purchase marketing appearing on the exterior and interior of stores were observed, such as advertising, use of promotions and types of tobacco product placement.

Tobacco Advertisements

Store Exterior

Tobacco advertising on stores' exteriors expose individuals to tobacco marketing, both as they approach stores and as they pass them (see Image 1). Approximately 67% of all stores observed (n = 320) were found to have at least one tobacco ad displayed in some location of the store's exterior (see Table 1), usually on exterior windows or doors. Convenience stores were more likely than other



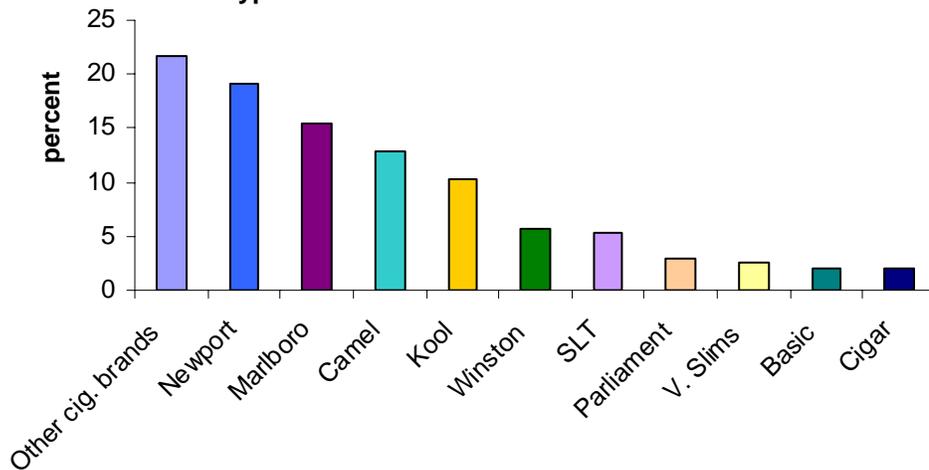
Image 1. Store with exterior tobacco ads. Newport ad on lower half of store door (left) and Camel ad on store building (right). Photo credit: whyquit.com

store types to have advertising on exterior doors or windows (83.5%). Among convenience stores, exterior ads on doors or windows were more common for chain convenience stores than non-chain convenience stores and gas station convenience stores. Advertising on an exterior location other than a door or window, such as on the building itself or elsewhere outside on the property (e.g., a fence), was less common. Only 25% of stores had tobacco advertising on some other exterior location besides the store door or windows. Such advertising was most commonly observed in gas station convenience stores.

Table 1. Percentage of stores with exterior tobacco advertising

| Store Type | % of stores with at least one ext. ad | % with ads on doors/windows | % with ads in other exterior location | % with ads at or below 3 feet | % with ads greater than or equal to 14 sq ft |
|--------------------|---------------------------------------|-----------------------------|---------------------------------------|-------------------------------|--|
| Convenience stores | 88.0 | 83.5 | 36.0 | 39.0 | 6.5 |
| Chain (n=87) | 92.0 | 90.8 | 34.5 | 40.2 | 6.9 |
| Non-chain (n=76) | 84.2 | 76.3 | 28.9 | 40.8 | 6.6 |
| Gas station (n=37) | 86.5 | 81.1 | 54.1 | 32.4 | 5.4 |
| Liquor (n=46) | 56.5 | 54.3 | 15.2 | 10.3 | 2.2 |
| Drug (n=42) | 16.7 | 14.3 | 2.4 | 9.5 | 2.4 |
| Supermarket (n=29) | 13.8 | 13.8 | 0.0 | 19.6 | 0.0 |
| Total | 67.2 | 63.8 | 25.0 | 30.0 | 4.7 |

Figure 1. Percentage of exterior ads on windows/doors by brand or tobacco type



In addition, 30% of stores were found to have at least one tobacco advertisement on the store’s exterior displayed at or below three feet, and therefore at a child’s eye level (see Table 1). Again, this placement was observed most frequently among convenience stores. In terms of magnitude of exterior advertising,

for 13% of the stores assessed, tobacco advertisements made up 50-100% of those stores' total exterior storefront advertising (i.e., including ads for non-tobacco products).

Overall, stores with exterior tobacco advertising displayed, on average, seven tobacco advertisements. In terms of brands, Newport had the largest percentage of exterior window or door ads for any single brand (19.2%), followed by Marlboro (15.4%), Camel (12.9%) and Kool (10.24) (see Figure 1). In addition, approximately 5.3% and 2.0% of ads were for smokeless tobacco (SLT) and cigar products, respectively.

Store Interior

Tobacco advertisements were also found inside of stores. Approximately 82% of all stores (n=305*) had at least one ad within the store's interior, with convenience and liquor stores more likely to have tobacco ads than drug stores or supermarkets (see Table 2). About 73% of stores had at least one ad close to the store's counter (within approximately 4 feet), and therefore close to the point-of-purchase, and 37.4% of stores had at least one ad in a location away from the counter (see Image 2). Convenience stores and liquor stores were more likely to have at least one ad near the store's counter than other store types (approximately 80% each), with chain convenience stores having the highest prevalence of such advertising (92.5%). Stores were somewhat less likely to have ads below three feet inside of stores (20.4% of stores) than outside of stores (30.0%). In addition, approximately 12% of stores had at least one interior ad displayed within 6 inches of candy, with gas station and chain convenience stores having the highest prevalence of this behavior.

Table 2. Percentage of stores with interior tobacco advertising

| Store Type | % of stores with at least one int. ad | % with ads by counter | % with ads away from counter | % with ads at or below 3 feet | % with ads within 6 in. of candy |
|--------------------|---------------------------------------|-----------------------|------------------------------|-------------------------------|----------------------------------|
| Convenience stores | 90.5 | 79.8 | 49.7 | 24.9 | 16.9 |
| Chain (n=80) | 95.0 | 92.5 | 42.5 | 31.3 | 21.3 |
| Non-chain (n=74) | 87.8 | 67.6 | 52.7 | 21.6 | 9.5 |
| Gas station (n=35) | 85.7 | 77.1 | 60.0 | 17.1 | 22.9 |
| Liquor (n=46) | 87.0 | 80.4 | 32.6 | 13.0 | 8.7 |
| Drug (n=40) | 62.5 | 55.0 | 10.0 | 15.4 | 0.0 |
| Supermarket (n=27) | 48.1 | 44.4 | 3.7 | 7.4 | 0.0 |
| Total | 82.3 | 73.4 | 37.4 | 20.4 | 11.8 |

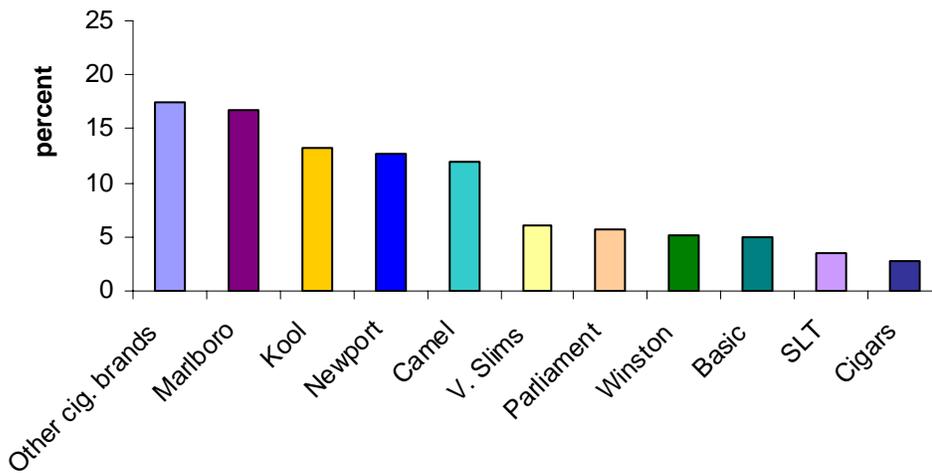
* Data for one county missing

Overall, stores with interior tobacco advertising displayed, on average, 8 interior ads. The same four brands accounted for the largest proportion of interior ads as for the exterior ads although in slightly different order. Marlboro accounted for the largest percentage of interior ads found by the store counter (16.7%), followed by Kool (13.3%), Newport (12.6%) and Camel (11.9%) (see Figure 2). In addition, approximately 3.5% and 2.8% of interior counter ads were for smokeless tobacco and cigar products, respectively.



Image 2. Hanging tobacco ads inside of a store, and away from counter
Photo credit: whyquit.com

Figure 2. Percentage of interior ads within 4 feet of counter, by brand or tobacco type



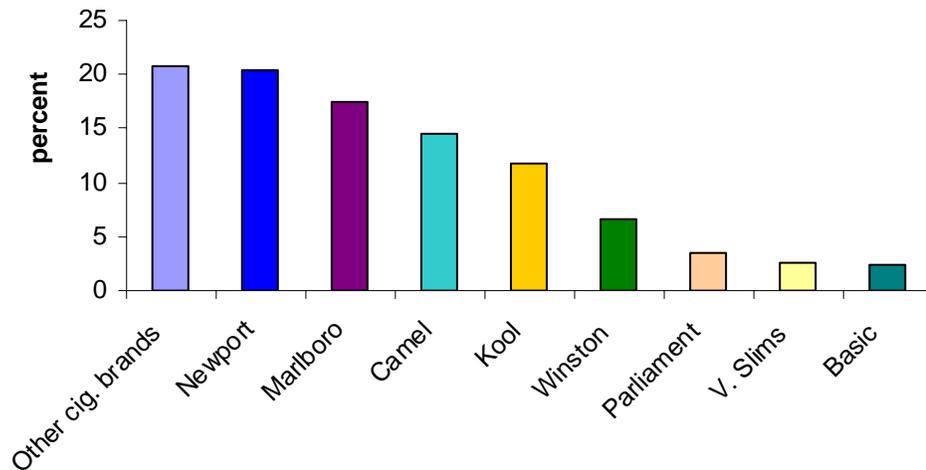
Promotions

In addition to the traditional advertising described above, the tobacco industry provides retail outlets with signs announcing special promotions designed to reduce the cost of its products or otherwise add value to them. These include price discounts on tobacco products, a promotional tactic which represents the largest category of all tobacco company advertising and promotional expenditures (FTC, 2005). The price of tobacco products can also be reduced or have value added to their purchase by offers providing free tobacco products (e.g., buy 1 get 1 free) or gifts with the purchase of tobacco products.

Overall, 83.3% of stores were found to have at least one promotion at the time of observation, and indications of these promotions were identified both outside and inside of stores. Specifically, about 45% of stores (n=320) had at least one exterior sign that indicated a promotion, with an average of four promotional signs found in each of these stores. In terms of brands, Newport had the greatest proportion

of exterior promotional signs (20.4%), followed by Marlboro (17.4%), Camel (14.5%) and Kool (11.7%) (see Figure 3).

Figure 3. Percentage of exterior signs indicating promotions, by brand or tobacco type



The store interior was more likely to display signage that indicated tobacco promotions, as 76.4% of stores (n=305*) were found to have at least one such promotional sign. Inside of stores, Marlboro was the dominant brand in terms of promotions, with over half of stores having at least one sign indicating a promotion on Marlboro products (see Table 3). Over one-third of stores also included promotions for Kool, Camel, and Newport products.

Table 3. Percentage of stores with interior signs indicating a promotion, by brand and tobacco type

| Brand | % of stores with interior signs for promotions | Brand | % of stores with interior signs for promotions |
|----------------|--|--------------|--|
| Marlboro | 52.1 | Winston | 23.0 |
| Kool | 38.7 | Basic | 18.4 |
| Camel | 35.1 | SLT brands | 9.5 |
| Newport | 35.1 | Cigar brands | 7.2 |
| Parliament | 29.8 | Other brands | 35.1 |
| Virginia Slims | 25.6 | | |

* Data for one county missing

Functional Items and Cartoons

Functional items are tobacco company branded items (i.e., marked with a tobacco brand name or logo) that serve a function other than displaying tobacco products, such as trashcans, clocks, etc.

A small percentage of stores had one or more tobacco functional items. Approximately 8% of stores were found to have at least one functional item on the exterior of the store (n=308^{*}) and 15% of stores had one or more functional items inside the stores (n=293[†]). Functional items found included items such as store signs indicating stores' hours of operation, coin trays, door mats, clocks and newspaper racks.

As mentioned earlier, the MSA banned the use of cartoon imagery in tobacco products or marketing materials. Cartoon imagery on tobacco or marketing materials was found in only 1.3% of stores and consisted of leftover items/materials that featured an image of Joe Camel.

Tobacco Placement

Another important facet of tobacco advertising in retail stores is the placement of tobacco products at the point-of-sale. Types of tobacco placement include the use of built-in-shelving, displays and overhead bins.

Built-in-shelving

When packs of tobacco products are placed together in large shelving units (such as those commonly seen behind store counters, see Image 3), they serve as another source of advertising, as they may act as “mini-billboards” for tobacco brands (Slade, 2001). The importance of location is perhaps best reflected by tobacco companies' provision of retailer incentives to guarantee that their products are placed in the most prominent viewing positions (Feighery et al., 2003). One such incentive is the provision of the actual shelving unit. Tobacco companies may provide retailers with free shelving units for all the store's tobacco products in exchange for the best position (usually towards the top and around eye-level) on



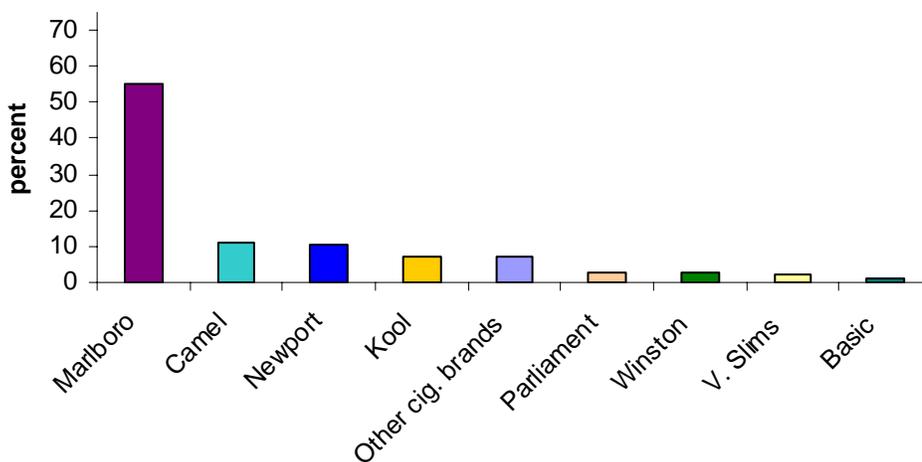
Image 3. Tobacco built-in shelving units behind the counter (left), with prominent placement given to Marlboro. Yellow interior “We Card” age-of-sale sign above register (right). Photo credit: whyquit.com

^{*} Data for one county missing

[†] Data for two counties missing

these units. Approximately 84% of all stores (n=293[†]) had at least one branded tobacco shelving unit, that is, a shelving unit with space for tobacco products and tobacco ads, including a dominant brand ad visible at the top of the unit. The majority of stores (79.5%) contained such a shelving unit within four feet of the store’s counter (e.g., behind the counter), allowing for greater visual impact at the point-of-sale. Stores that had at least one tobacco branded shelving unit had, on average, 4 different shelving units. Distinct branded shelving units were counted according to the brand of the dominant logo/ advertisement placed at the top of each individual unit. Based on what is known about retailer incentive programs, it is presumed that these units were provided to retailers by this dominant brand, and that the dominant brand in turn received the largest and most prominent space on the shelving unit. As seen in Figure 4, more than half of shelving units were branded by Marlboro (55.3%). For approximately 11% and 10% of units, the dominant brand was Camel and Newport, respectively. It should be noted that these three brands represent the brands most popular with young people.

Figure 4. Percentage of built-in shelving units by dominant brand of unit



Displays

In contrast to shelving units, tobacco branded “displays” are smaller and portable, and generally hold tobacco products for only one brand (see Image 4). Approximately 60% of stores (n=293[†]) were found to have at least one tobacco branded display (see Table 4). In terms of location of displays, 22.2% of stores had at least one tobacco display directly on the counter and thus within greater direct view of customers. Counter displays were observed most frequently in liquor stores. About one quarter of all displays found on counters belonged to a cigar brand, while another fifth of all counter displays belonged to a brand of smokeless tobacco (see Figure 5). Otherwise, 46.4% of stores were found to have at least one display



Image 4. Display of Camel exotic blends cigarettes
Photo credit: trinketsandtrash.org

[†] Data for two counties missing

within 4 feet of the counter (including behind the counter) and another 15% were found to have at least one display in another store location away from the counter (and thus potentially acting as self-service displays).

Figure 5. Percentage of display units on counter by dominant brand of unit

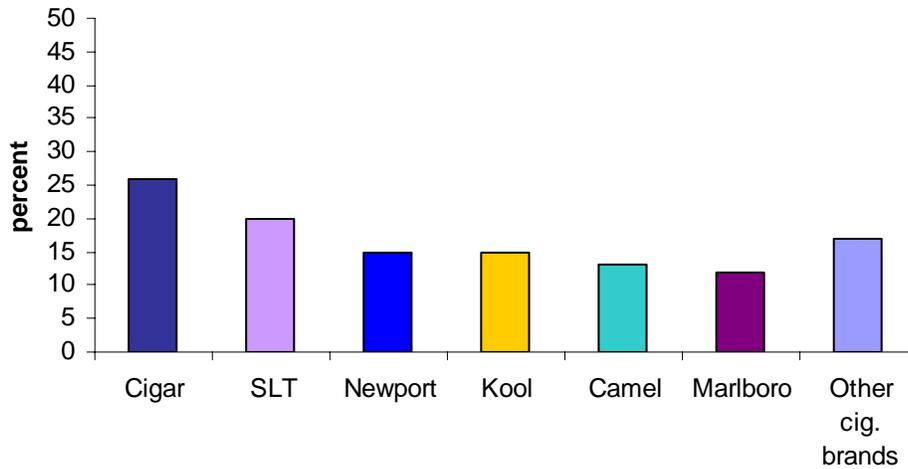


Table 4. Percentage of stores with interior tobacco branded displays

| Store Type | % of stores with at least one display | % with display on counter | % with display within 4 ft of counter | % with display away from counter | % with displays at or below 3 feet | % with displays within 6 in. of candy |
|--------------------|---------------------------------------|---------------------------|---------------------------------------|----------------------------------|------------------------------------|---------------------------------------|
| Convenience stores | 66.8 | 23.7 | 52.5 | 19.9 | 11.0 | 14.4 |
| Chain (n=75) | 66.7 | 21.3 | 58.7 | 16.0 | 10.7 | 13.3 |
| Non-chain (n=72) | 66.7 | 29.2 | 45.8 | 25.0 | 11.1 | 15.3 |
| Gas station (n=34) | 67.6 | 17.6 | 52.9 | 17.6 | 11.8 | 14.7 |
| Liquor (n=45) | 66.7 | 37.8 | 51.1 | 11.1 | 2.2 | 2.2 |
| Drug (n=39) | 46.2 | 10.3 | 41.0 | 2.6 | 7.7 | 7.7 |
| Supermarket (n=25) | 12.0 | 4.0 | 4.0 | 4.0 | 0.0 | 4.0 |
| Total | 59.4 | 22.2 | 46.4 | 15.0 | 8.2 | 10.6 |

Approximately 11% of stores were found to have displays that were within six inches of candy. This was most frequently observed in convenience stores, particularly in non-chain convenience stores (see Table 4). Approximately 8% of convenience stores were also found to have displays that were at or below three feet, and thus within eye-level of children.

Additional Tobacco Placement

Overhead Bins

Approximately 39% of retail outlets (n=303^{*}) stored tobacco products in overhead bins (either as the sole storage unit or in addition to others such as built-in shelving). These bins are usually located above a store's cash register, are only within reach of a store employee, and usually make tobacco products difficult for customers to see. However, only about 2.4% of stores used such bins as the only major unit for tobacco placement (i.e., had no other displays or built-in shelving).

Self-Service Tobacco

Stores were also observed to see if any tobacco products were within direct access to customers, such that customers (including youth) could essentially "help themselves" to the products. Only 1.7% of stores were found to have "self-service" cigarettes available. Stores were more likely, however, to have smokeless tobacco products and cigar products with self-service access to customers (7.2% and 14.8%, respectively). Liquor stores were the outlet type most likely to have self-service cigars available (see Table 5).

Table 5. Percentage of stores with self-service cigars

| Store Type | % |
|--------------------|-------------|
| Convenience stores | 16.4 |
| Chain (n=75) | 15.0 |
| Non-chain (n=72) | 17.6 |
| Gas station (n=34) | 17.1 |
| Liquor (n=45) | 23.9 |
| Drug (n=39) | 5.0 |
| Supermarket (n=25) | 0.0 |
| Total | 14.8 |

Age-of-Sale Signs

In addition to assessing the amount and type of tobacco marketing in retail outlets, stores were also observed to identify the prevalence of tobacco age-of-sale signs (signs used to indicate that patrons must be of a certain legal age to purchase tobacco). Approximately 93% of all retail stores observed (n = 320) displayed at least one age-of-sale sign on the storefront exterior. On average, stores displayed two age-of-sale signs on the exterior of the store (such as doors or windows) and the most commonly observed sign (58.9% of all signs) was the yellow "We Card" sign produced by Philip Morris (see Image 3). Other signage included different industry produced age-of-sale signs and signs produced by the New Jersey Department of Health and Senior Services. It should be noted that some signs were observed to be out of date - that is, signs indicating 18 instead of 19 years of age as the legal age of sale in New Jersey. Similarly 93.1% of all stores (n=305^{*}) displayed at least one age-of-sale sign in the interior of the store (such as by the cash register), with "We Card" again being the most predominantly observed sign (present in 91.4% of stores).

^{*} Data for one county missing

Conclusions and Implications

This report provides a first look at the amount and type of tobacco marketing in New Jersey retail stores and finds it to be prevalent. Overall, 93.1% of stores observed (n=317) were found to have at least one tobacco ad or promotion. Such marketing was found in all store types but was most common in convenience stores and liquor stores.

The high prevalence of tobacco marketing in New Jersey retail stores is cause for concern. Tobacco advertising in the retail environment works to normalize tobacco use, as tobacco products are advertised and sold as commonly as other conveniences and necessities, such as newspapers and food (Wakefield et al., 2006). As mentioned earlier, retail tobacco advertising can serve the same function as other tobacco advertising, such as triggering the purchase of tobacco and impacting brand recall and perceptions. Furthermore, while the Master Settlement Agreement placed restrictions on other advertising affecting youth such as outdoor billboards and advertising in youth magazines, in-store advertising operates virtually without restrictions, and therefore youth exposure to tobacco advertising from retail outlets may be higher than from any other channel. This study found that the majority of tobacco ads were located inside of stores near the check-out counter, a desirable and highly competitive location for manufacturers, which makes exposure to tobacco advertising inevitable when attempting to purchase any store items (Feighery et al., 2001). In addition, as described in this report, retail marketing extends to the exterior of stores, thus having the potential to influence youth or other individuals merely driving or passing by.

The high prevalence of promotions in stores is also significant in that they may reduce the price or add value to tobacco through “gift” offers, thus making tobacco products more affordable or desirable, especially to youth who are known to be particularly cost-sensitive. The presence of such promotions at the point-of-sale may also work to influence impulse buying. It is also worthy to note that stores were most likely to have advertisements and promotions for the brand Kool and for the three brands most popular with youth - Marlboro, Newport and Camel.

This report also considered the amount and placement of tobacco products within stores, as the visual impact of tobacco products placed together can serve as its own unique source of advertising. Stores were found to have several units of built-in shelving for tobacco products, which, when placed side by side, can create a large display of rows of tobacco products at the point-of-sale, as commonly found behind store counters. In fact, such displays have sparked the term “powerwall” among tobacco control activists in reference to their appearance and effect (Greaves, 2003). Such displays of tobacco at the

point-of-sale can again work to influence impulse buying (Ruel et al., 2004), brand recall and even youth's perceptions of access to tobacco (Wakefield et al., 2006). In contrast, only a small percentage of stores were found to use overhead bins for holding tobacco products, a method that both limits physical and visual access to tobacco products. In addition, while few stores were found to have self-service accessible cigarettes, a sizeable number of stores were found to have cigars within self-service access to customers. Self-service tobacco placement may also facilitate impulse buying (Ruel et al., 2004) and has been associated with increased youth access due to illegal sales and shoplifting (Wildey et al., 1995).

Not only did stores have larger percentages of ads, promotions and shelving for tobacco brands popular with young people (i.e., Marlboro, Camel and Newport), but a large proportion of stores (41.8%) were found to have tobacco ads at or below three feet, and thus in direct view of children. Stores (particularly convenience stores) were also found to have tobacco ads or products in close proximity to candy, another means of increasing exposure among youth. Furthermore, it should be noted that the estimates included in this report provide a conservative measure of the proximity of tobacco-related materials to items of potential interest to youth. For example, advertisements such as those illustrated in Image 2, though beyond 6 inches from candy, still create a visual impact of tobacco marketing at a point in the store where youth may direct their attention.

Reducing tobacco industry influences has been identified by the Centers for Disease Control and Prevention as a goal towards preventing tobacco initiation among young people, with retail advertising and promotion being a major source of industry influence. While the MSA has contributed to reducing industry influences by restricting certain marketing channels, effort is now needed to address the relatively unrestricted domain of the retail environment, which has grown as a source of advertising since the MSA. Advocacy and policy efforts are needed to change this marketing landscape. In fact, such advocacy efforts have been successful as bans on tobacco ads at the point-of-sale have already been implemented in countries including Ireland, New Zealand and Thailand as well as several states and provinces in Australia and Canada, respectively (Henriksen et al., 2004). Tobacco control activists should also advocate for the removal of tobacco products from plain view of patrons in retail stores. Several Canadian provinces have also already passed laws to eliminate the "powerwall" marketing phenomena (Canadian Cancer Society, 2006). In the meantime, continued research and surveillance should be used to track the prevalence and type of point-of-purchase marketing to which our community members are regularly exposed.

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More information

The data in this brief are based on a convenience sample of 320 stores in New Jersey. Data were collected in the 21 counties of New Jersey by each county's Community Partnership Coordinator between September and October 2006. Coordinators attended a one-day training on data collection and used a 39 item store observation form/instrument. The instrument was adapted from those used by other states and pre-tested by UMDNJ staff prior to project implementation. Coordinators were instructed to conduct observations in any 15 stores in their county that sell tobacco, to include at least 8 convenience stores, 2 pharmacies, 2 liquor stores and 1 supermarket, and to represent different county geographic regions. Upon completion, Coordinators provided evaluation feedback on the project process and experience. As a pilot study based on a small convenience sample of stores, this data should be used with great caution, as it may not be representative of true estimates.

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For more information on the data reported in the brief or for a copy of a technical report, contact the New Jersey Department of Health and Senior Services at 609-292-9194, or visit their website at: <http://www.state.nj.us/health/as/ctcp>.

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