

## Serbia Tiny Targets Report: Tobacco Advertisement, Sales, Product Displays, and Purchase Incentives around Primary, and Secondary Schools



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## Executive Summary

**Tiny Targets field agents observed 315 points of sale (POS) around 100 schools in Belgrade, Serbia.**

Investigators monitored points of sale near schools for evidence of tobacco industry promotional tactics targeting youth that have been observed in dozens of countries in recent years where the world's biggest tobacco companies' (British American Tobacco, Imperial Brands, Japan Tobacco, and Philip Morris International) products are sold. The frequency with which these tactics have been observed around the world suggest a multinational marketing plan to addict the next generation to tobacco

### **Main results:**

- 42.2% of all tobacco displays were near candy or toys
- 35.9% of all tobacco displays were at a child's eye level
- 36.8% of POS sold flavored tobacco products
- 75.9% of POS sold heated tobacco products
- 17.5% of POS sold cut tobacco for hand rolled cigarettes
- Approximately 59% of POS are placed inside 100-metres radius from the schools
- The most common forms of advertising were posters in 95.6% of POS
- Tobacco Branded items (e.g. cash trays) were recorded in 7.6% of POS
- Tobacco products from the world's biggest tobacco companies were observed at all points of sale investigated: British American Tobacco (88.9% of POS investigated), Phillip Morris International (76.8% of POS investigated), Japan Tobacco (68.3% of POS investigated), Imperial Tobacco (66% of POS investigated).

### **Serbia must protect its children by passing comprehensive legislation and strengthening enforcement of the law:**

- Advertisement, display and purchase incentives of tobacco products (including cigarettes, E-cigarettes and Heated tobacco and Tobacco for hand rolls cigarettes at POS need to be banned, due to massive and obvious targeting teenagers and youth.
- Sale of cigarettes, E-cigarettes, and Heated tobacco within a 100-meters radius from the educational institutions needs to be banned due to high availability for kids. Besides needs to introduce a penalty system for violation of this measure.
- Sale of flavored cigarettes needs to be banned due to flavored tobacco products appeal to younger consumers.
- Need to equate electronic cigarettes and heated tobacco to tobacco products.

## Background

The Campaign for Tobacco-Free Kids is launching an international campaign focused on confronting predatory and often illegal tobacco marketing practices that target youth. This campaign will engage the broader public to become advocates and activists who are educated and activated on how to expose these practices. By contributing to a crowd-sourced knowledge base, they will help build future campaigns backed by evidence of these instances.

## Methodology

### Kobo Toolbox

Between April 10<sup>th</sup>, 2019 and May 22<sup>nd</sup>, 2019, Field Agents performed visual surveys of tobacco advertising, sale, displays, and purchase incentives located within a 10-minute walking distance radius of primary, and secondary schools in Belgrade, Serbia. They were equipped with a cellular-based mobile reporting form hosted on the survey and data-collection software, Kobo Toolbox, to document instances. The mobile form included a survey where Field Agents could input their observations of tobacco points of sale, advertising, products for sale, displays, brands, sales tactics and purchase incentives. When uploading this data, the mobile form automatically captured the date, geographic coordinates, and data collector name for each record uploaded to the dataset. Field Agents were given the option to upload two pictures of their observations. The order of questions and format of response options were designed to facilitate rapid and discrete observation by data collectors.

### School Data

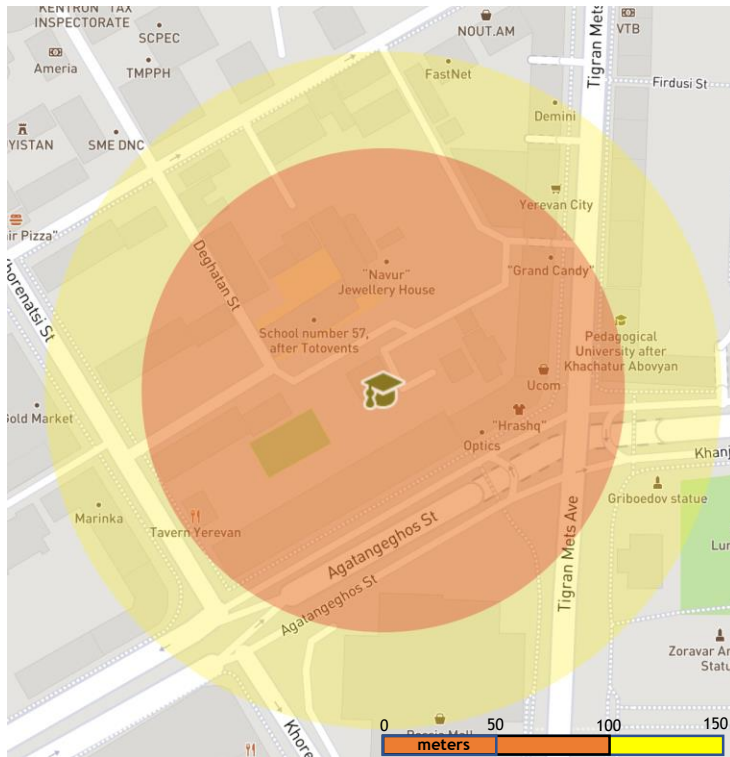
Tiny Targets Field Agents observed and recorded the geographic coordinates of 315 points of sale (POS) around 100 schools in Belgrade, Serbia.

### Mapping

Data gathered by Field Agents was uploaded into the Kobo Toolbox form. Each data point (including longitude and latitude) was downloaded and mapped using MapBox, an open source mapping platform for custom designed maps. Using Mapbox we plotted out all educational institutions for minors. To view all maps, go to:

<http://map.takeapart.org/>

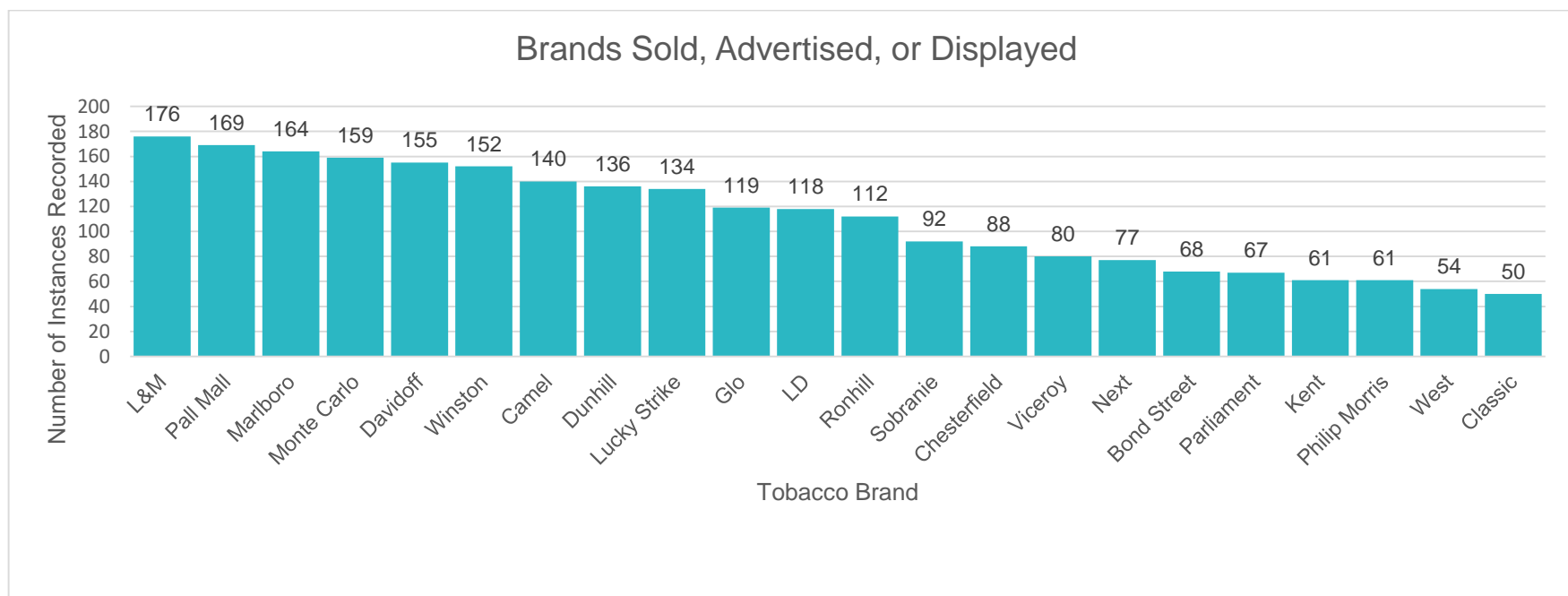
Each school then had two radii drawn to measure the school's distance from recorded tobacco advertising, sales, displays, and purchase incentives. Radii were drawn 100m (in orange) and 150m (in yellow) from schools. The scale of the maps is according to the following image:



## Results

### Tobacco Brands Sold, Advertised, or Displayed

Tiny Targets Field Agents recorded 3418 instances of 150 tobacco brands being sold, advertised, or displayed. Of these, the brands with the most instances were L&M (176 instances, 5.5%), Pall Mall (169 instances, 4.9%), Marlboro (164 instances, 4.8%) and Monte Carlo (159 instances, 4.6%).



*Fig 1. Instances of tobacco brands sold, advertised, or displayed recorded in Serbia*

## E-cigarettes and heated tobacco Sold, Advertised, or Displayed

Tiny Targets Field Agents recorded 366 instances of 5 E-cigarettes and Heated tobacco brands being sold, advertised, or displayed. Of these, the brands with the most instances were Glo (183 instances, 50%), and IQOS (166 instances, 45.3%).

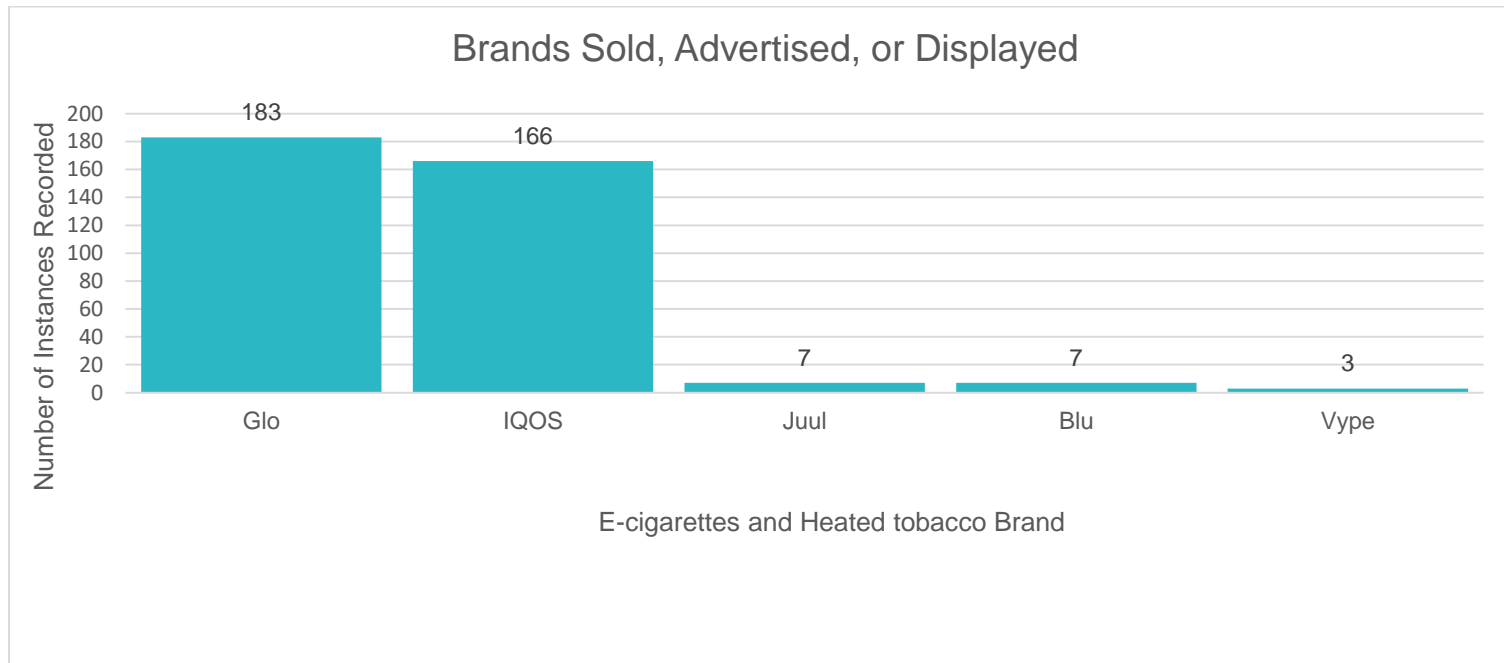


Fig 2. Instances of E-cigarettes and heated tobacco brands sold, advertised, or displayed recorded in Serbia

Images of E-cigarettes and heated tobacco Sold, Advertised, or Displayed



Fig 3. GLO advertising in small grocery store in Belgrade.

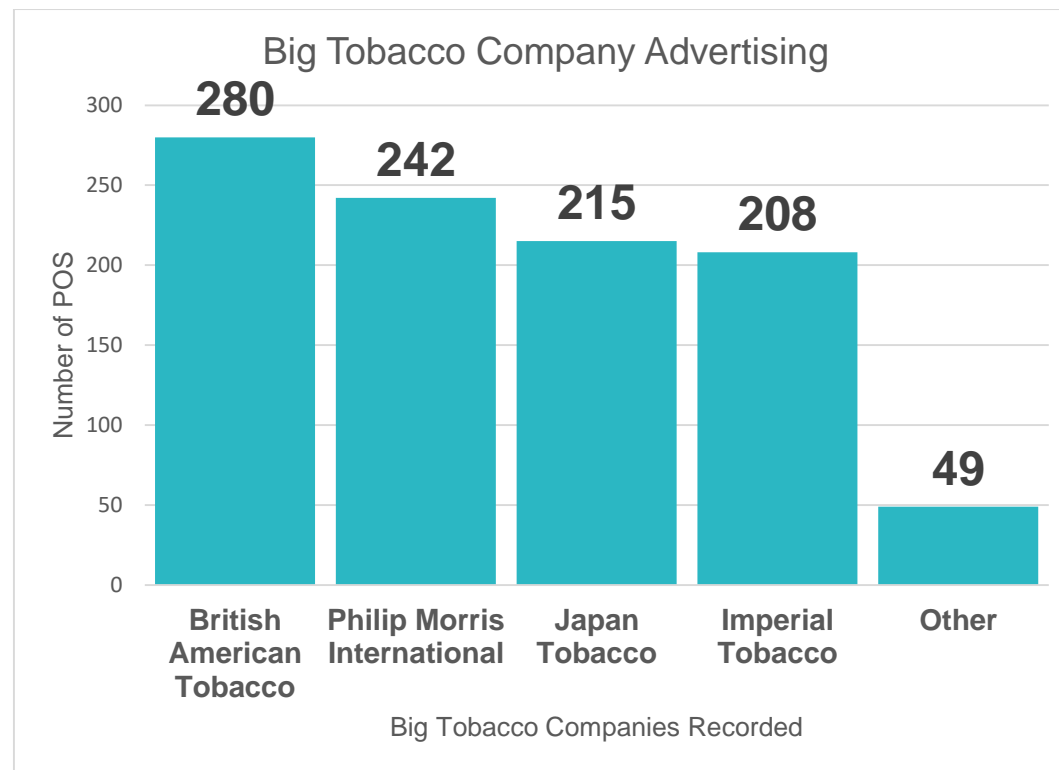


Fig 4. IQOS stand near cashier zone in Supermarket in Belgrade.

## Big Tobacco Company Brands Sold, Advertised, or Displayed by Points of Sale

Tiny Targets Field Agents recorded 315 points of sale where Big Tobacco parent company tobacco brands sold, advertised, or displayed.

The largest number of points of sale investigated near schools has British American Tobacco products for sale (280 POS, 88.9% of POS), followed by Phillip Morris International (242 POS, 76.8% of POS), Japan Tobacco (215 POS, 68.3% of POS), Imperial Tobacco (208 POS, 66% of POS). Other tobacco companies were represented in 49 POS (15.6% of POS).

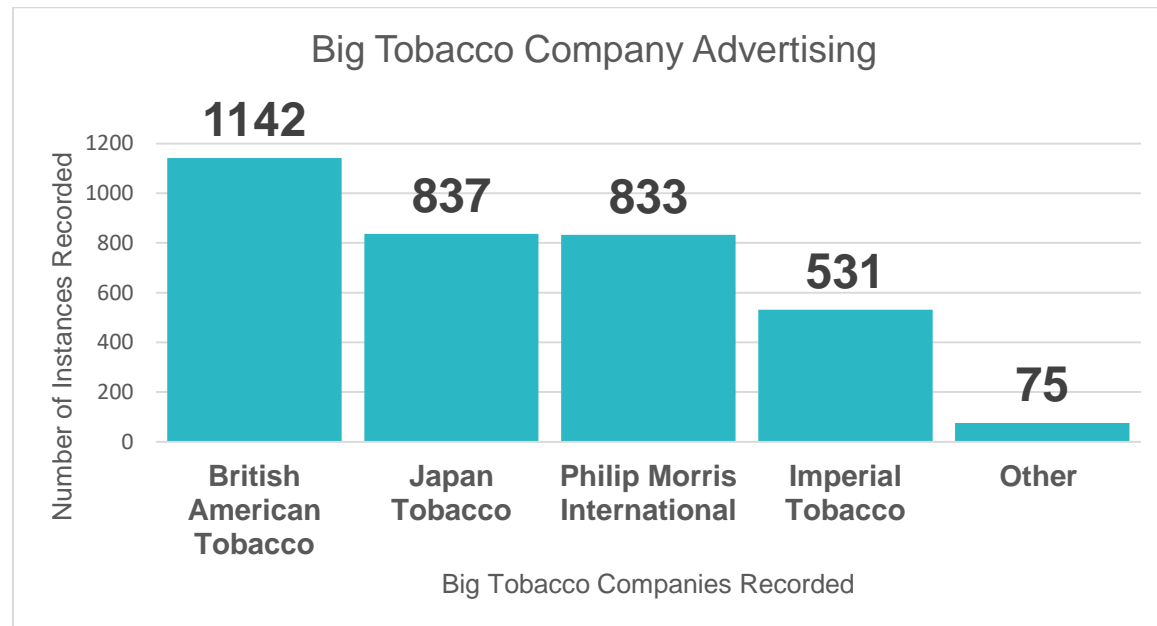


*Fig 5. Big Tobacco parent company tobacco brands sold, advertised, or displayed recorded by Field Agents in Belgrade, Serbia*

## Big Tobacco Companies with Most Brands Sold, Advertised, or Displayed at Points of Sale

Tiny Targets Field Agents recorded 3418 instances of 148 tobacco brands being sold, advertised, or displayed. As many of the brands sold, advertised, or displayed around schools are subsidiaries of larger multinational tobacco companies, these were sorted into their respective parent company, the results of which are reported below.

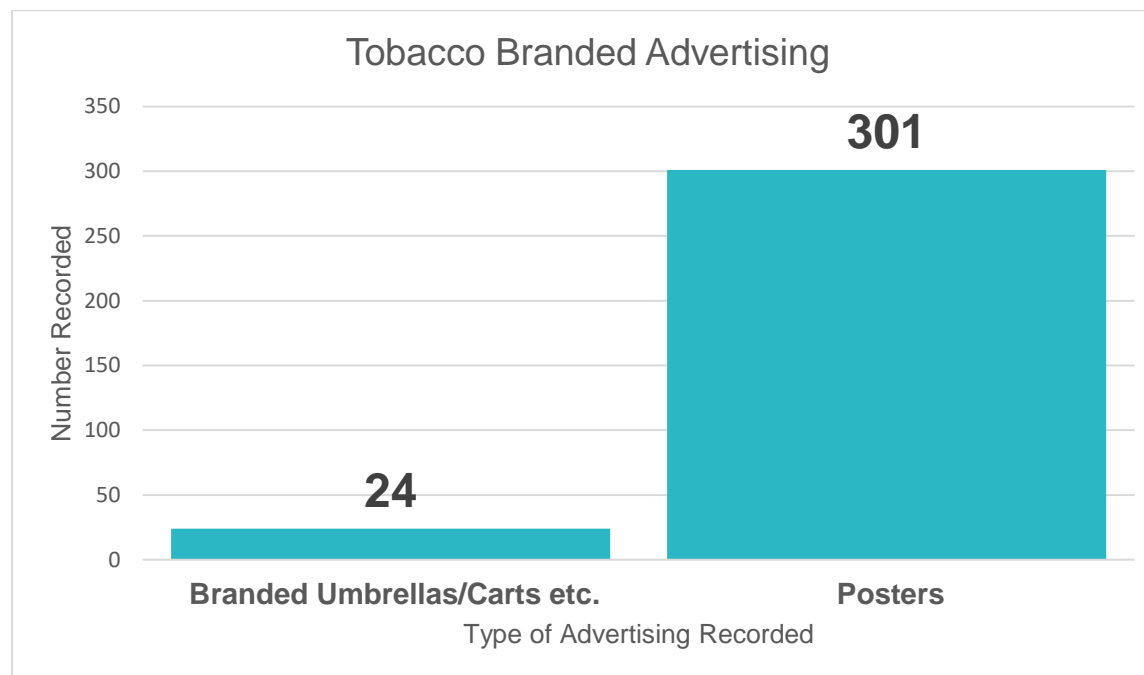
The parent company with the most brands sold, advertised, or displayed around schools was British American Tobacco (1142 instances, 33.4% of instances) followed by Japan Tobacco (837 instances, 24.5% of instances), by Phillip Morris International (833 instances, 24.4% of instances), Imperial Tobacco (531 instances, 15.5% of instances), and Other tobacco companies (75 instances, 2.2% of instances)



*Fig 6. Big Tobacco parent company tobacco brands sold, advertised, or displayed recorded by Field Agents in Belgrade, Serbia*

## Tobacco Advertising around Schools

Tiny Targets field agents recorded 315 tobacco branded advertisements. The most common forms of advertising were posters (301 instances, in 95.6% of POS), followed by Tobacco Branded items (e.g. cash trays (24 instances, in 7.6% of POS)



*Fig 7. Tobacco branded advertising instances recorded by Field Agents in Belgrade, Serbia*

To view this map, navigate to: <http://map.takeapart.org/> and select “Posters” for the city you wish to view.

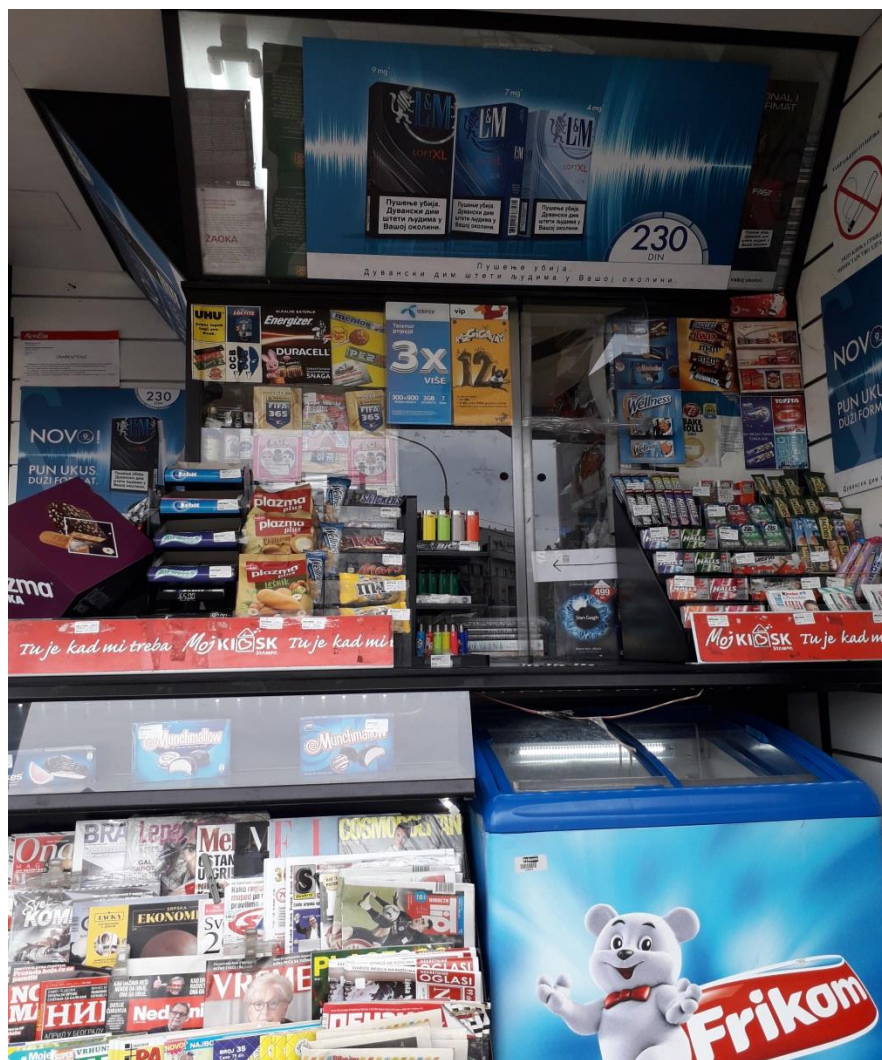


Fig 8. Image of a L&M posters recorded by Field Agents in Belgrade, Serbia in a kiosk 100m from a school

95.6% of POS  
had tobacco  
branded  
posters

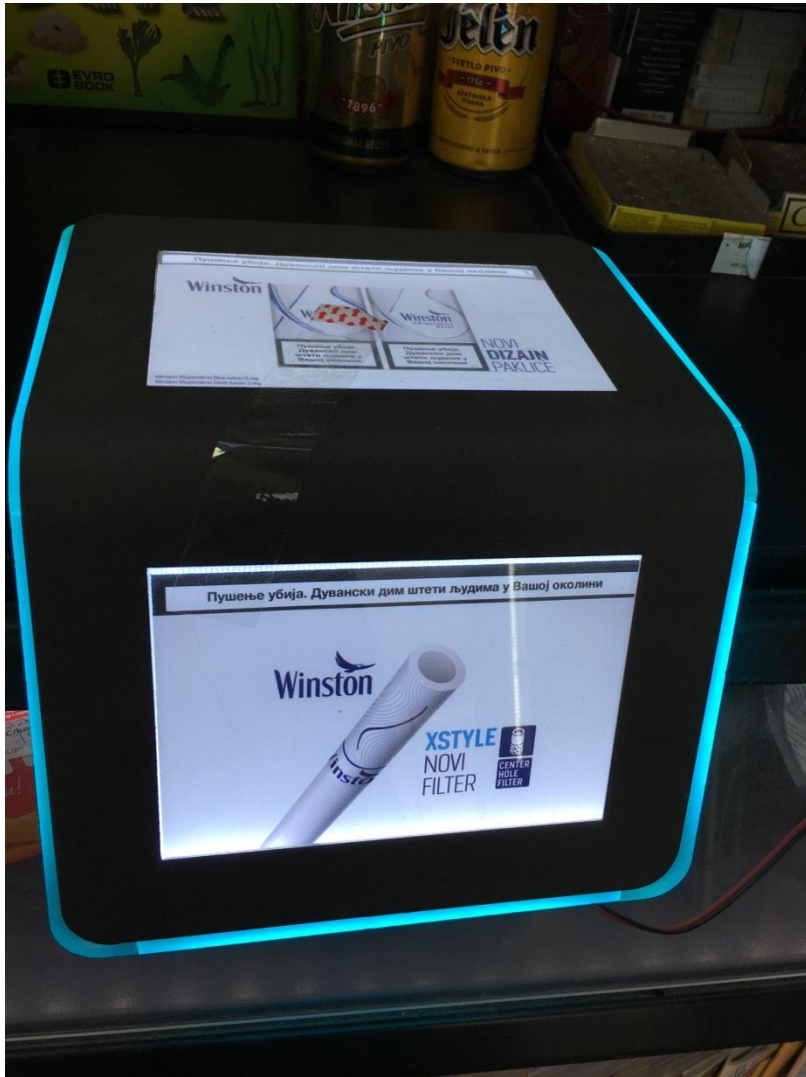


Fig. 9 Tobacco branded cash tray in kiosk in Belgrade

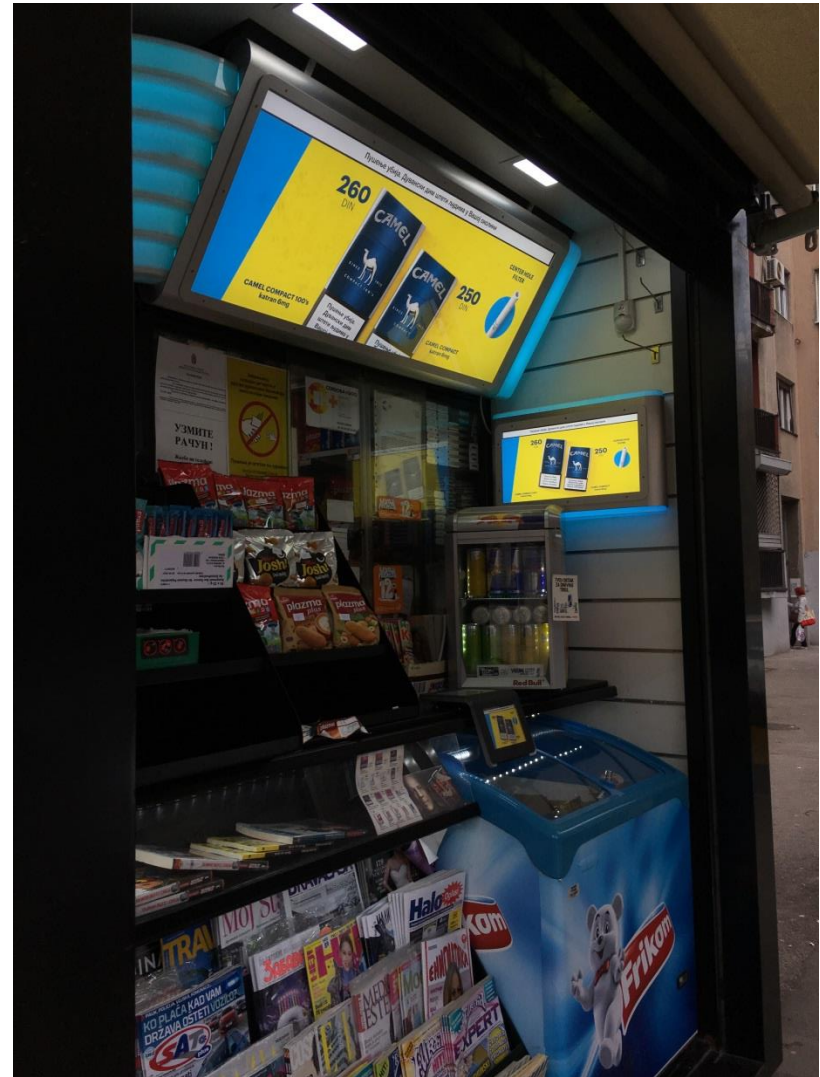


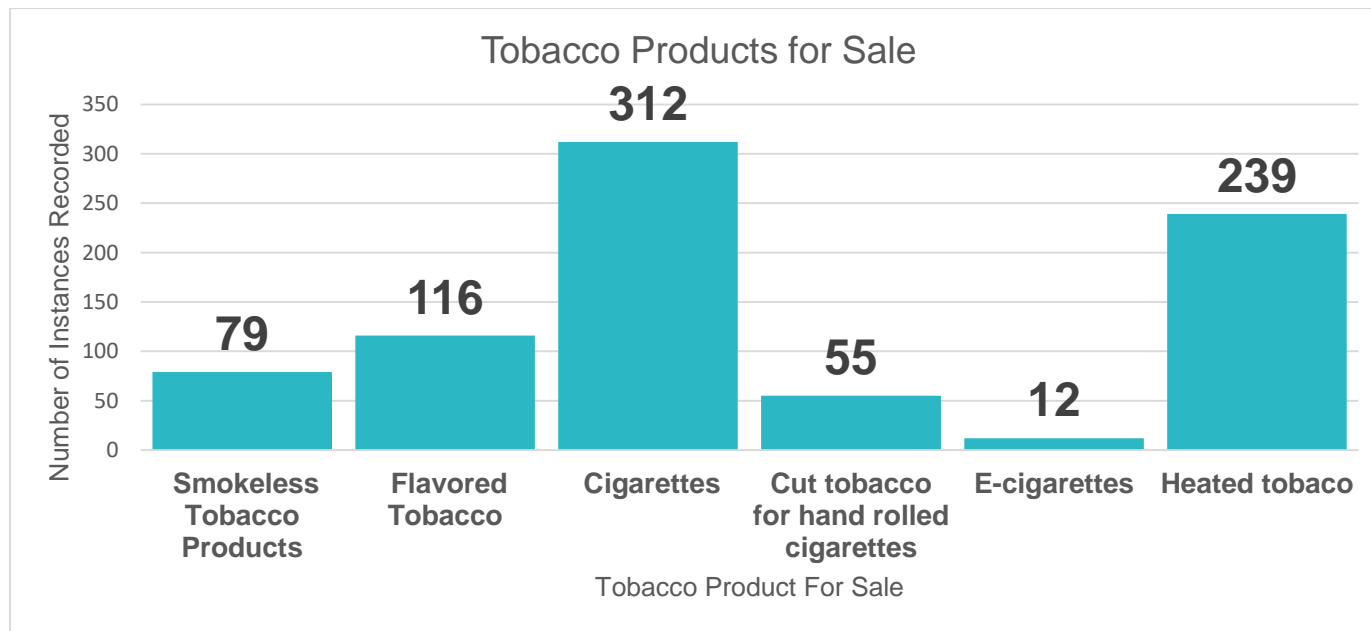
Fig. 10 Kiosk with Camel Mono brand advertising in Belgrade



Fig. 11 IQOS Advertising covered most part of the kiosk in Belgrade

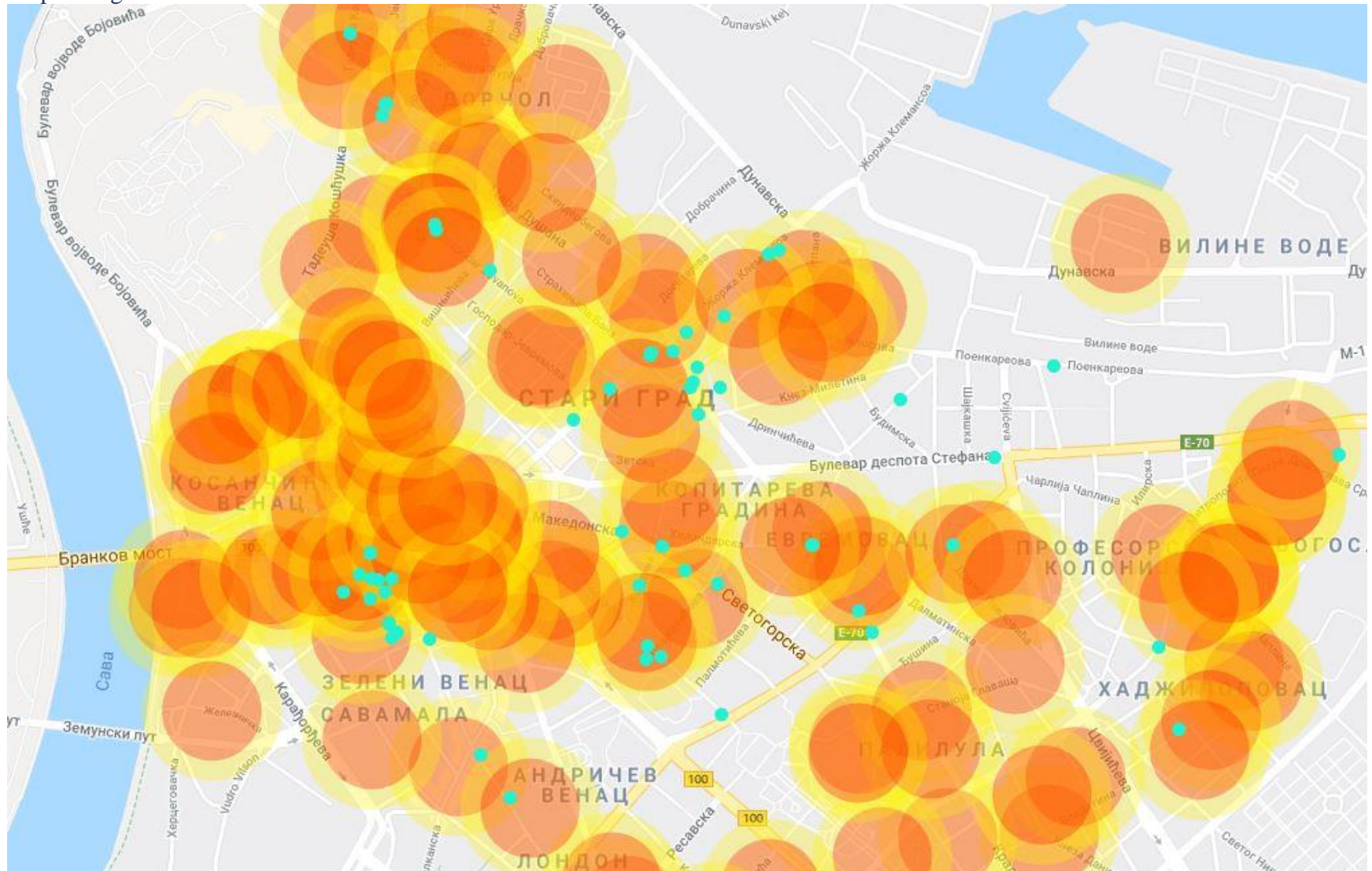
## Tobacco Products for Sale

Tiny Targets field agents recorded 813 instances of tobacco products for sale. These products were sorted into the following categories: cigarettes (all types of cigarettes including flavored), flavored tobacco products (e.g. flavored cigarettes), smokeless tobacco products, e-cigarettes, heated tobacco, and Cut tobacco for hand rolled cigarettes. Of these, the most common tobacco product for sale was cigarettes (312 instances, sold in 99% of POS), followed by Heated cigarettes (239 instances in 75.9% of POS), flavored tobacco products (116 instances, in 36.8% of POS), Smokeless tobacco products (79 instances in 25.1% of POS), Cut tobacco for hand rolled cigarettes (55 instances in 17.5% of POS), and E-cigarettes (12 instances in 3.8% of POS).



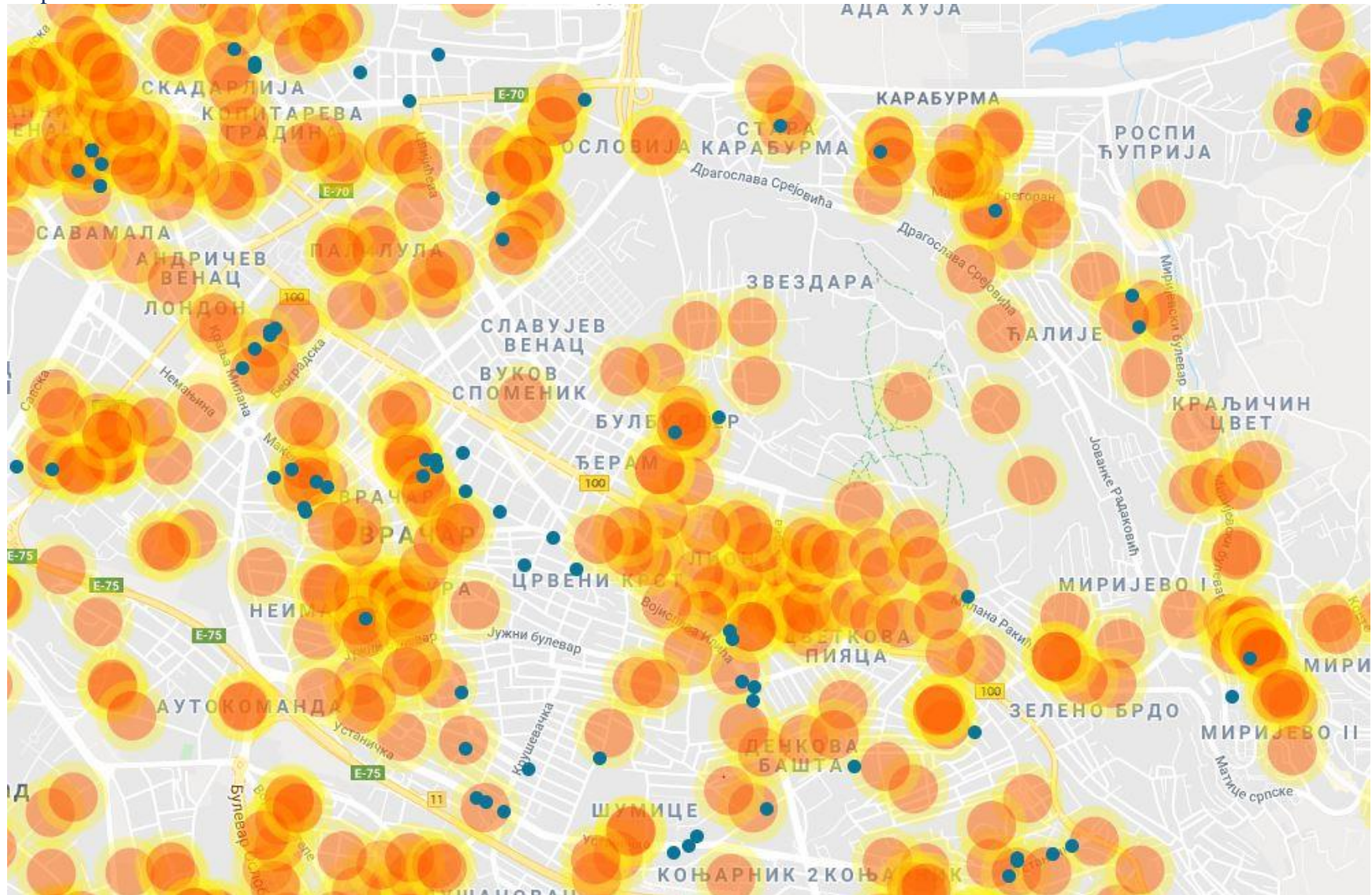
*Fig 12. Instances of tobacco products for sale recorded by Field Agents in Belgrade, Serbia*

## Map of Cigarettes for Sale



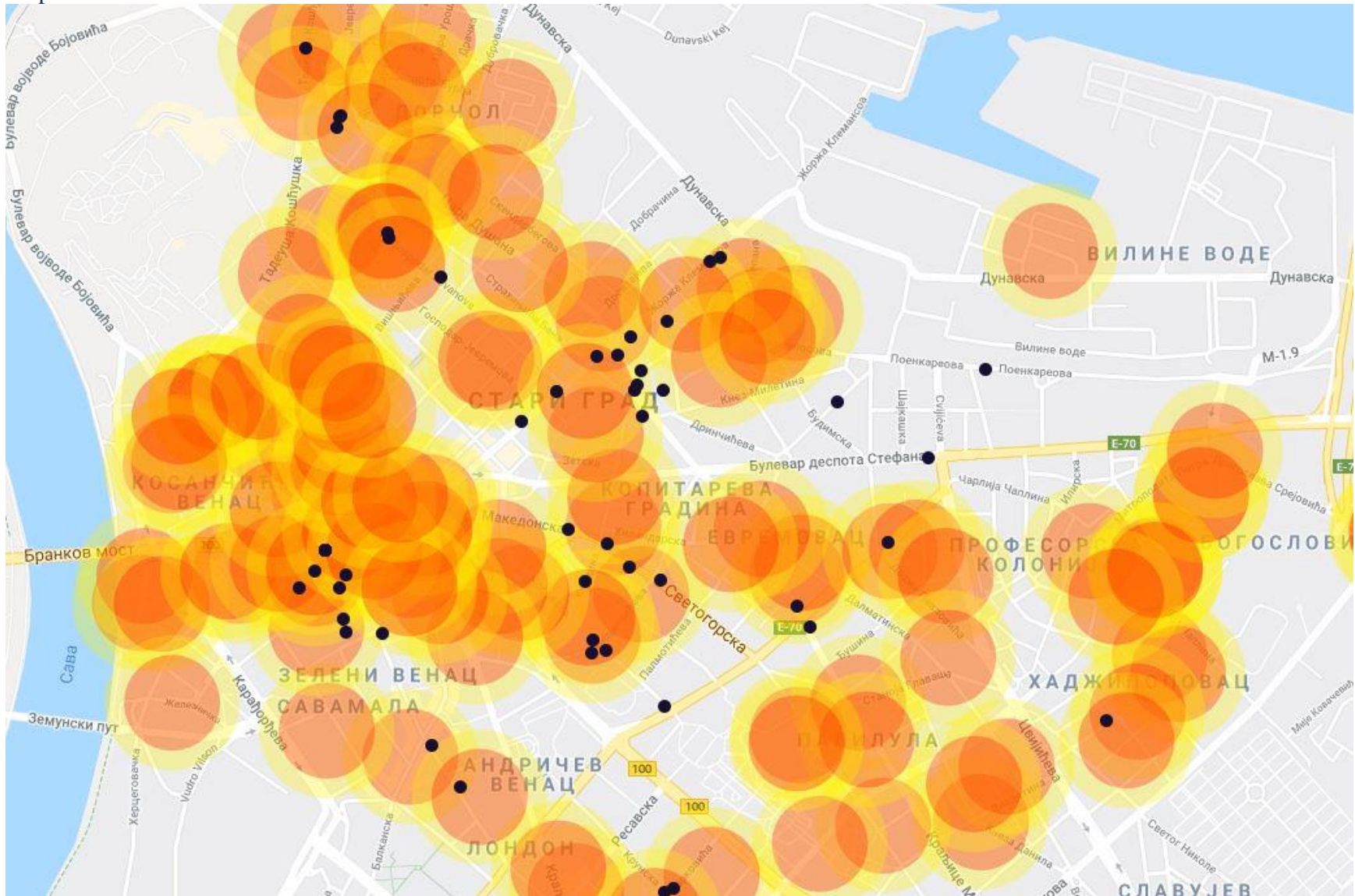
To view this map, navigate to: <http://map.takeapart.org/> and select “Cigarettes” for the city you wish to view.

## Map of Flavored Tobacco for Sale



To view this map, navigate to: <http://map.takeapart.org/> and select “Flavored Tobacco” for the city you wish to view.

## Map of Heated Tobacco for Sale



To view this map, navigate to: <http://map.takeapart.org/> and select “Heated Tobacco” for the city you wish to view.

## Images of Tobacco Products for Sale

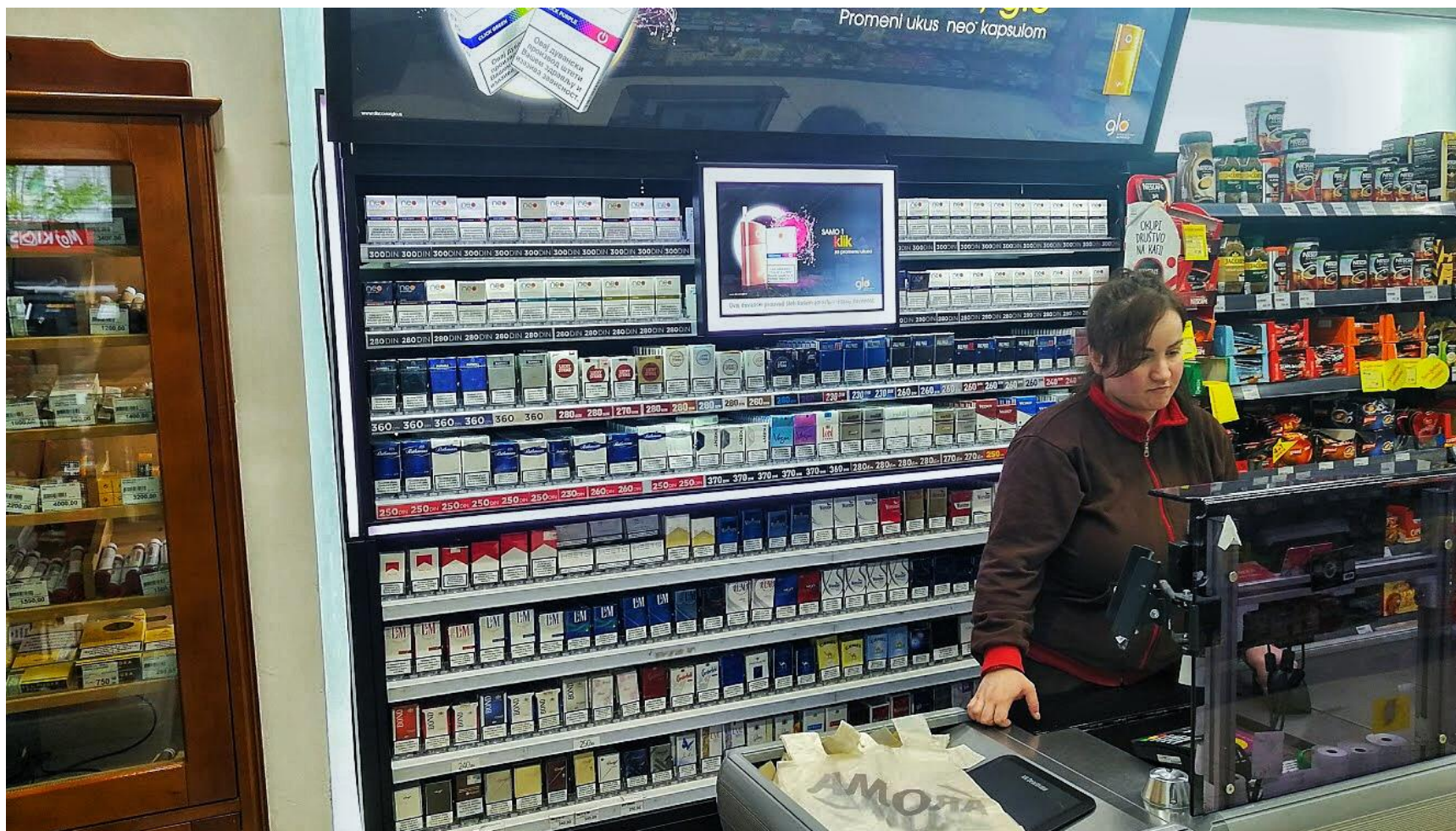
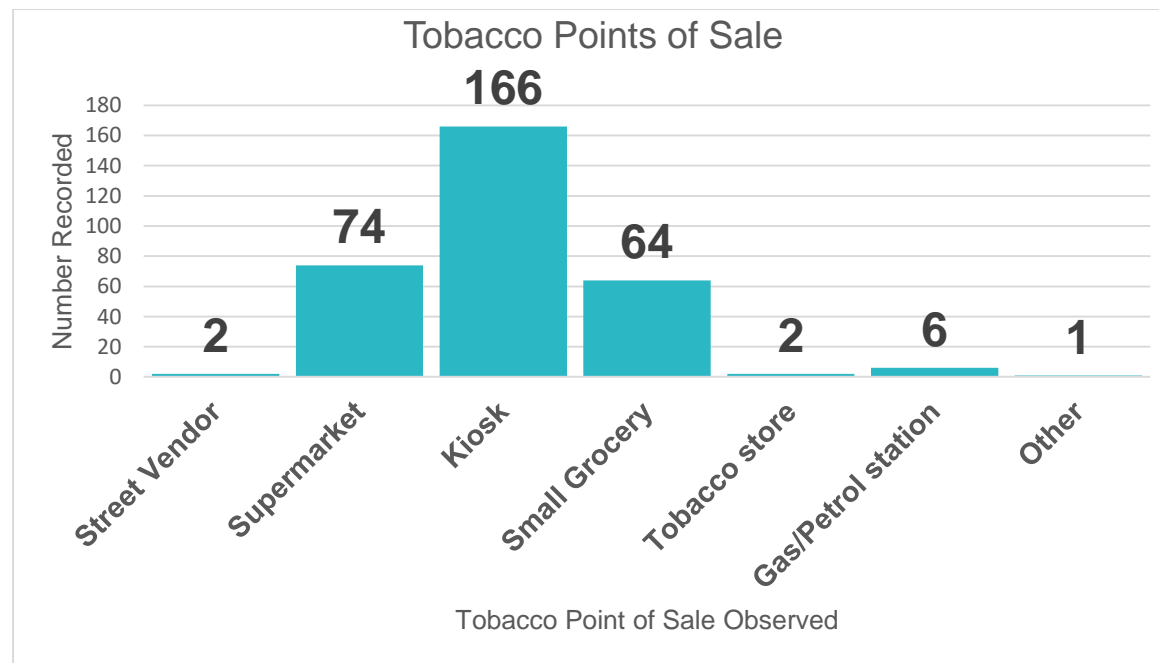


Fig. 13 Tobacco products displayed for sale in small grocery store in Belgrade, Serbia. Power walls with light boxes.

## Tobacco Points of Sale

Tiny Targets field agents recorded 315 tobacco points of sale. These were distributed into the following categories: small grocery stores, kiosks, supermarkets, street vendors, Tobacco stores, Gas stations, and other tobacco vendors. Of these, the most common point of sale for tobacco and tobacco products were Kiosks (166 instances, 52.7% of POS) followed by supermarkets (74 instances, 23.5% of POS), small grocery stores (64 instances, 20.3% of POS), Gas/petrol (6 instances, 1.9% of POS), Street vendor (2 instances, 0.6% of POS), Tobacco store (2 instances, 0.6% of POS),



*Fig. 14 Points of sale where tobacco products are sold, advertised, or displayed recorded by Field Agents in Belgrade, Serbia*

## Images of Tobacco Points of Sale

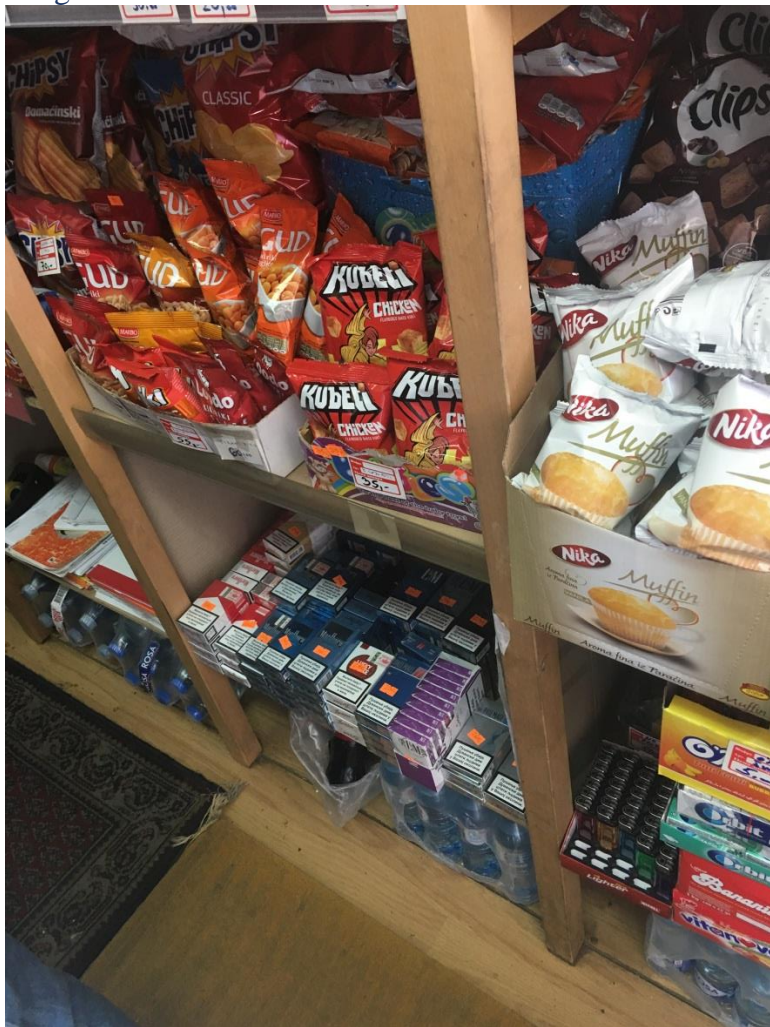


Fig. 15 Tobacco display in Small grocery store near snacks



Fig. 16 Street vendor with Tobacco display at a child's eye level (less 1m)

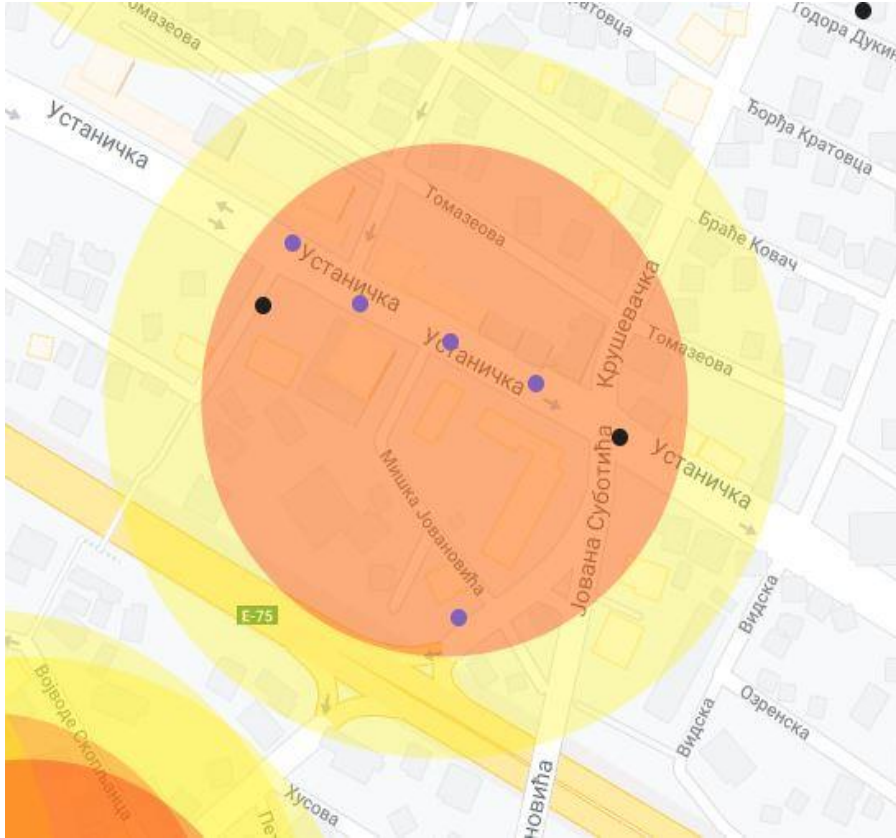


Fig. 17 Tobacco advertising in kiosk near toys and magazines for kids



Fig. 18 Tobacco and E-cigarettes advertising near sweets and magazines for kids at a child's eye level (less 1m), tobacco display inside kiosk clearly visible from outside

100-meter radius from the schools



Approximately  
**185 POS - 59%**  
of POS were  
placed inside  
100-metres  
radius from the  
educational  
institutions

## Tobacco Displays

Within the 315 tobacco points of sale identified, Tiny Targets Field Agents recorded 228 tobacco product displays (72% on POS). Of these, 48% (150 instances) had health warnings visible, 36% (113 instances) were at a child's eye level of 1 meter, and 42%(133 instances) of them were near candy or toys

35.9%

Of tobacco displays  
Were at a child's  
eye level (1m)

52.3%

Of tobacco displays  
Had no health  
warnings visible

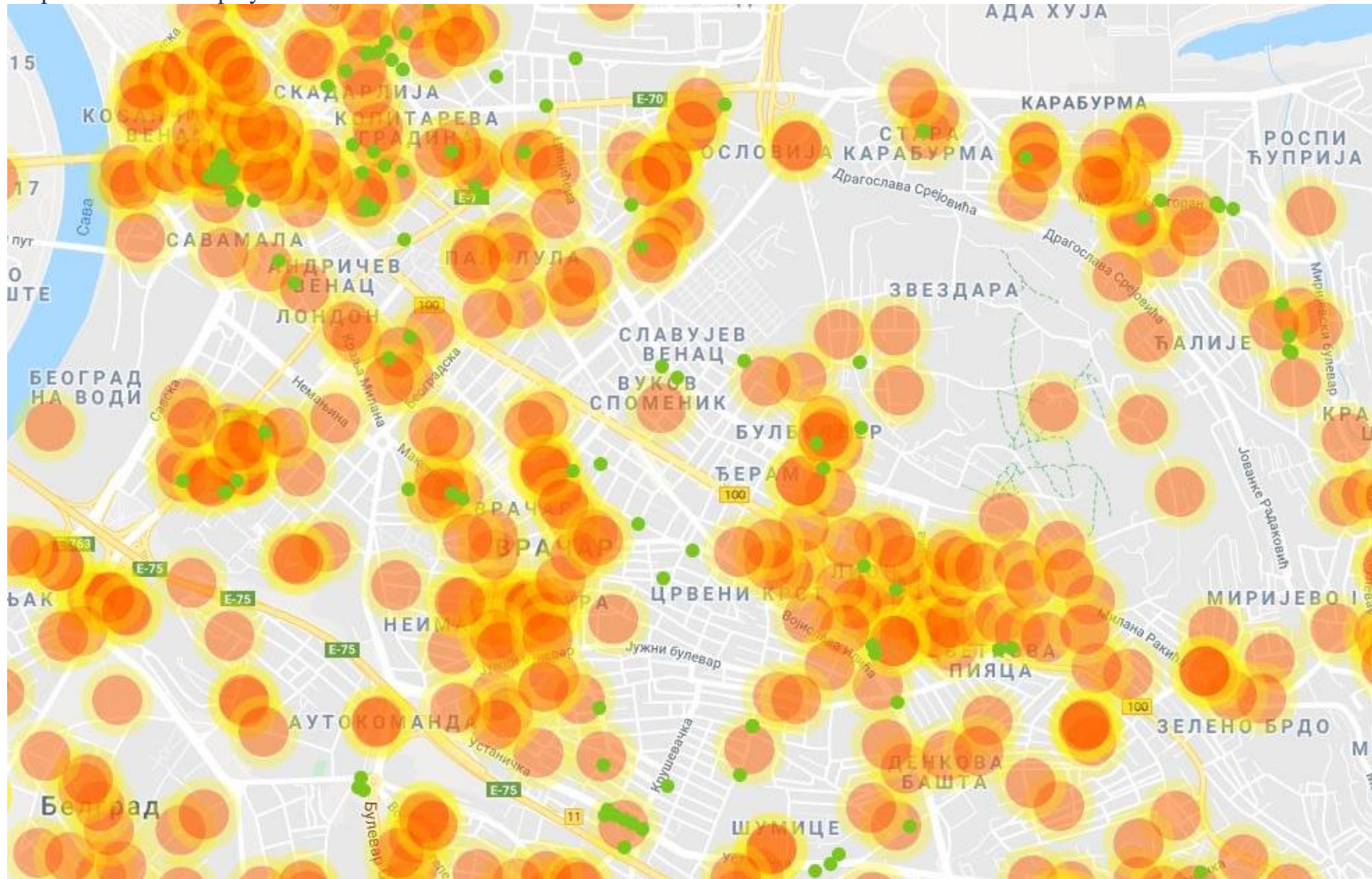
42.2%

Of tobacco displays  
Were beside candy  
or toys



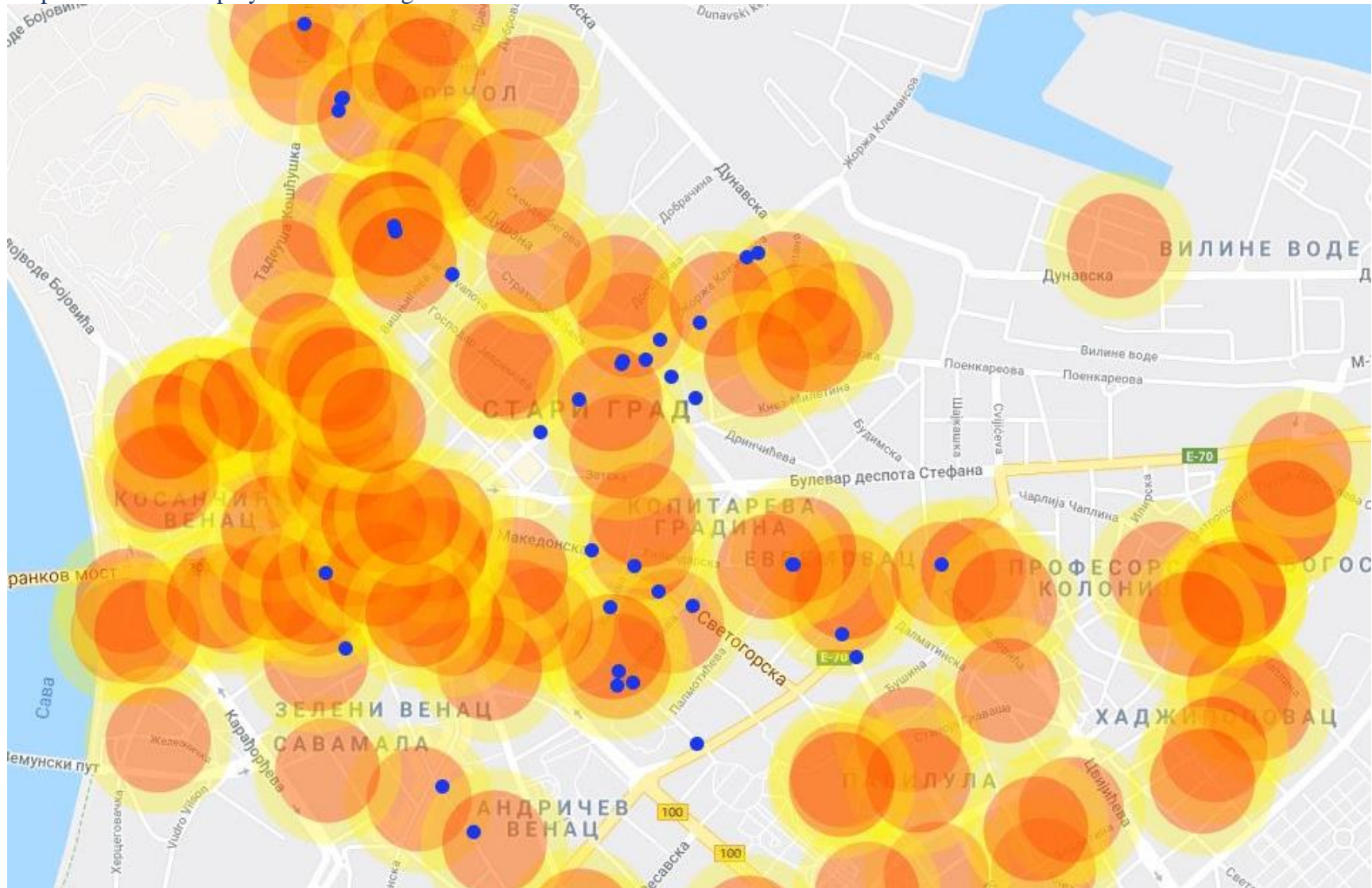
Fig. 19 Display in kiosk at a child's eye level

## Map of Tobacco Displays



To view this map, navigate to: <http://map.takeapart.org/> and select “Displays” for the city you wish to view.

### Map of Tobacco Displays at Child Height



To view this map, navigate to: <http://map.takeapart.org/> and select “Displays at Child Height” for the city you wish to view.

Map of Belgrade showing the distribution of 1000 points of interest, represented by orange circles of varying sizes, indicating their relative importance or frequency. The map includes major roads (E-70, E-75, E-63), rivers (Sava, Danube), and numerous neighborhood names in Cyrillic.

To view this map, navigate to: <http://map.takeapart.org/> and select “Displays Next to Candy, Toys” for the city you wish to view.

## Images of Tobacco Points of Sale

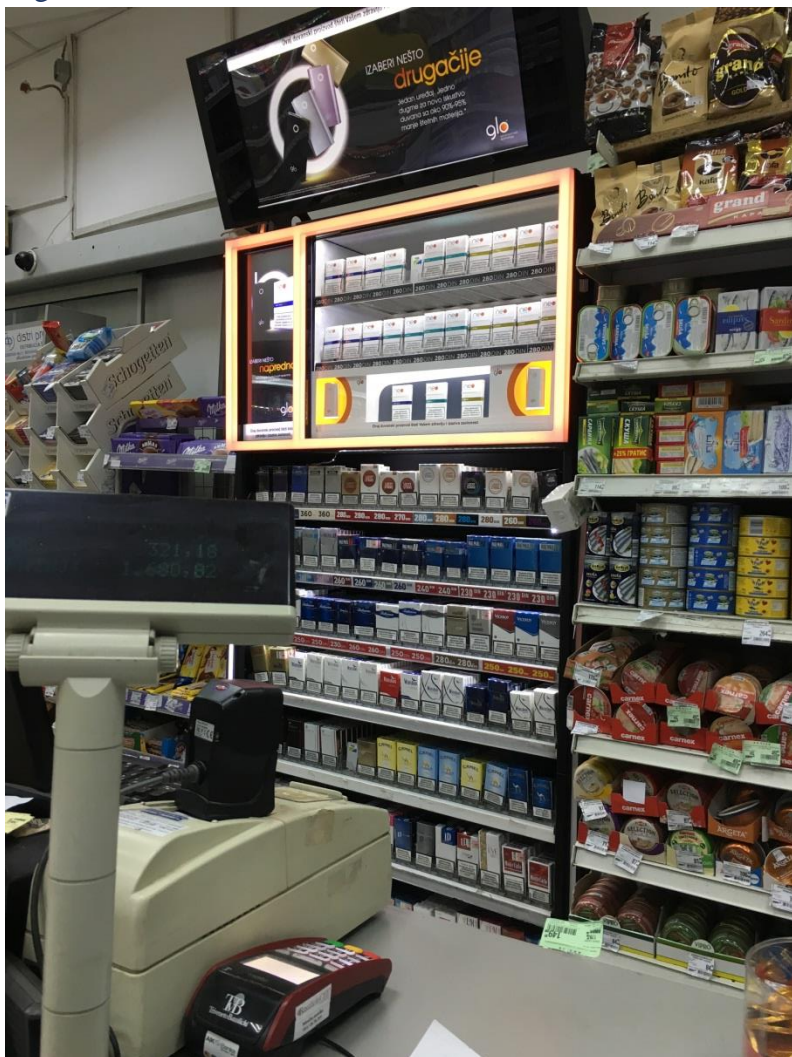


Fig. 20 Tobacco display in small convenience store with posters near candies and snacks



Fig. 21 Tobacco packs near stickers for kids in kiosk.

## Tobacco Purchase Incentives

Within the 315 tobacco points of sale, Tiny Targets Field Agents recorded purchase incentives. These were categorized into: Gifts (Free or with purchase), price discounts, free tobacco products, special or limited-edition packs, imitation cigarette candies or toys, mentions of tobacco company-sponsored events (concerts, parties, festivals, etc.), contests or competitions, and the physical presence of a brand representative in store.

The most common purchase incentives were gifts, price discounts, special or limited-edition packs, imitation cigarette candies or toys

## Discussion and conclusion

Investigators monitored points of sale near schools for evidence of tobacco industry promotional tactics targeting youth that have been observed in dozens of countries in recent years where the world's biggest tobacco companies' (British American Tobacco, Imperial Brands, Japan Tobacco, and Philip Morris International) products are sold. The frequency with which these tactics have been observed around the world suggest a multinational marketing plan to addict the next generation to tobacco

The data gathered by Tiny Targets Field Agents in Belgrade, Serbia from April 10th, 2019 and May 22nd, 2019 has particular significance. While not all records fell directly within a 100-150-meter radius from a school, every instance of tobacco products being advertised, sold, displayed, or incentivized is well within a child's walking distance of the 100 schools. It is inevitable that a child walking to or from any of the reported schools would come across some form of tobacco product.

Research shows there is a link between the density of POS selling cigarettes, advertising and the level of tobacco use among minors.<sup>i</sup> The level of tobacco consumption among minors who attend school in areas with a high density of cigarette POS is significantly higher than that of peers who attend school in areas where tobacco is not for sale.<sup>ii</sup>

Research also shows that shows that flavored products - no matter what the tobacco product - appeal to youth and young adults. Data from the 2013-2014 Population Assessment of Tobacco and Health (PATH) study found that 80.8 percent of 12-17 year olds who had ever used a tobacco product initiated tobacco use with a flavored product, and that 79.8 percent of current tobacco users had used a flavored tobacco product in the past month. Moreover, for each tobacco product, at least two-thirds of youth report using these products "because they come in flavors I like."<sup>iii</sup>

### **Main results:**

35.9% of all tobacco displays were at a child's eye level, 42.2% of them were near candy or toys, 36.8% of POS sold flavored tobacco products, 75.9% of POS sold heated tobacco products, 17.5% of POS sold cut tobacco for hand rolled cigarettes. The most common forms of advertising were posters in 95.6% of POS, Tobacco Branded items (e.g. cash trays) were recorded in 7.9% of POS.

Approximately 185 POS (59%) are placed inside 100-metres radius from the schools.

Tobacco products from the world's biggest tobacco companies were observed at all points of sale investigated: British American Tobacco (88.9% of POS investigated), Phillip Morris International (76.8% of POS investigated), Japan Tobacco (68.3% of POS investigated), Imperial Tobacco (66% of POS investigated).

When we combine these factors with the significant penetration of tobacco advertising in multiple forms, it is easy to postulate that a child incentive to purchase a tobacco product is significant, and barriers to purchase are low.

#### Recommendations:

**Serbia must protect its children by passing comprehensive legislation and strengthening enforcement of the law:**

- Advertisement, display and purchase incentives of tobacco products including E-cigarettes and Heated tobacco at POS need to be banned, due to massive and obvious targeting teenagers and youth.
- Sale of cigarettes, E-cigarettes, and Heated tobacco within a 100-meters radius from the educational institutions needs to be banned due to high availability for kids. Besides needs to introduce a penalty system for violation of this measure.
- Sale of flavored cigarettes needs to be banned due to flavored tobacco products appeal to younger consumers.
- Need to regulate electronic cigarettes and heated tobacco as tobacco products.

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<sup>i</sup> [2012 Surgeon General's Report—Preventing Tobacco Use Among Youth and Young Adults](#)

<sup>ii</sup> Henriksen, L, et al., [“Is adolescent smoking related to the density and proximity of tobacco outlets and retail cigarette advertising near schools?”](#) Preventive Medicine 47(2):210-4, 2008.

<sup>iii</sup> Ambrose, BK, et al., [“Flavored Tobacco Product Use Among US Youth Aged 12-17 Years, 2013-2014.”](#) *Journal of the American Medical Association*, published online October 26, 2015.