

Ad-hoc Report #3: Results from the Online Smokers' Survey

Draft Report

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1. INTRODUCTION

Tobacco industry marketing is a strong counterforce to tobacco control efforts (US DHHS, 2000). In the face of increasing regulation, the tobacco industry has continually shifted their marketing strategies to media channels that are largely unregulated, presenting new challenges for tobacco control (Institute of Medicine, 2007). In 2005, the industry spent 84.8% of its marketing expenditures in retail stores; followed by 6.6% in direct mail; 1.9% on event promotions, sponsorships, and adult venues such as bars and clubs, and 0.3% on magazine advertising (Federal Trade Commission, 2007).

The Florida Department of Health, Bureau of Tobacco Prevention Program (BTPP) is working to mitigate tobacco industry influences in the state of Florida and to improve public health through smoking prevention and cessation initiatives. In 2009, Florida's counter-marketing media campaign ran adult ads targeting smoking cessation. Television advertisements that aired and were tracked in 2009 include *Wait*, *Working Man*, *See Baseball*, and *See Mirror*.

RTI has been contracted by the BTPP to provide an independent evaluation of its program. As part of this evaluation, RTI has developed a surveillance system to monitor tobacco industry marketing practices in: retail stores, magazines, direct-to-consumer marketing programs, and sponsorships and charitable contributions to organizations.

To complement this observational data, we conduct an online survey to assess Florida smokers':

- 1) exposure to and attitudes about tobacco industry marketing strategies;
- 2) attitudes about regulating tobacco industry marketing practices; and
- 3) exposure and receptivity to the BTPP anti-smoking counter-marketing media campaign ads.

The Online Smokers' Survey (OSS) will be conducted on an annual basis. This report provides information on the baseline survey conducted in July 2009. It is intended that this baseline assessment will inform future BTPP policy efforts to limit tobacco industry marketing practices and provide feedback on the effectiveness of their counter-marketing efforts.

2. BACKGROUND

Online Smokers Survey

The OSS is a repeated cross-sectional survey of approximately 500 Florida smokers and will be conducted annually. RTI developed the survey items based on similar work for other states such as New York and Indiana. The survey was approved by the Institutional Review Boards of RTI and the Florida Department of Health.

The survey was programmed and administered by RTI's subcontractor, Harris Interactive, a worldwide online market research firm best known for the Harris Poll and for its use of the Internet to conduct market research. Harris Interactive maintains a panel of roughly 6 million Internet respondents who have agreed to participate in online research studies. By using Harris Interactive to conduct the survey online, we were able to show media files (video or screen images) of BTPP's tobacco counter-marketing ads and confirm awareness of ads and measure receptivity to the ads and their messages.

The survey was administered to individuals who are: 1) Florida residents, 2) over 18 years old, and who 3) have previously indicated that they are smokers. Potentially eligible participants were sent email invitations which included a brief description of the survey. Individuals who were interested logged on to the secure Harris Interactive website and read a brief introduction and consent form that described the confidential and voluntary nature of the survey. Potential participants answered a series of screening questions to determine if they qualify. If eligible, participants were asked to provide consent and then proceeded to the survey. On average, surveys took about 20 minutes to complete. The data collection lasted 4 weeks in July 2009.

Measures

The OSS covers 4 main topics: demographic and individual characteristics and smoking behaviors; exposure to and attitudes about tobacco marketing strategies; attitudes and perceived social norms about tobacco control policies; and exposure and receptivity to BTPP's anti-tobacco counter-marketing ads.

Sample items for each main topic are provided below.

1) Demographic and individual characteristics and smoking behaviors

These include general demographic measures such as gender, age, county, and income. Information about the individuals' media use, shopping habits, and entertainment activities were also assessed. For example, respondents were asked about their media use (e.g. TV and internet), how often they frequent different types of stores (e.g. grocery and convenience stores), and how frequently they go to

places like bars and clubs. Standard smoking behavior items includee the number of cigarettes smoked daily, quit intentions, brand smoked, and prices paid. Smokers' were also asked about their use of coupons and whether they took advantage of promotions when purchasing tobacco products. Finally, information on their knowledge and use of new tobacco products (e.g. Snus, Taboka, E-cigarettes) was collected.

2) **Exposure to and attitudes about tobacco marketing strategies**

These questions assessed smokers' exposure to and attitudes about tobacco marketing strategies. For example:

Exposure: In the past 12 months, how often did you notice cigarette brands displayed prominently at sports or athletic events, rodeos, or music festivals?

Attitude: How do you feel about having cigarette brands on display at events at sports or athletic events, rodeos, or music festivals?

Similar questions were also asked for retail tobacco advertising, direct-to-consumer marketing programs, and tobacco industry financial contributions. Attitudes were measured on a scale of 1 (totally acceptable) to 5 (totally unacceptable).

3) **Attitudes and perceived social norms toward tobacco control policies**

These questions ask survey participants whether they would support policies regulating tobacco marketing strategies and whether other adults they spend time with (perceived social norm) would support these policies. These "social norms" help inform how smokers' perceive their attitudes in a broader social context. For example:

- What is your opinion about a policy that would ban tobacco companies from displaying cigarette brands at sports or athletic events, rodeos, or music festivals?
- What do the adults you spend time with think about a policy that would ban tobacco companies from displaying their brands at brands at sports or athletic events, rodeos, or music festivals?

Similar questions were also asked for retail tobacco advertising, direct-to-consumer marketing programs, and tobacco industry sponsorships and financial contributions. Attitudes and perceived norms about regulating tobacco marketing strategies were measured on a scale of 1 (strongly against) to 5 (strongly in favor).

4) Awareness of and receptivity to anti-tobacco counter-marketing ads

To assess awareness of and receptivity to anti-tobacco counter-marketing ads, survey participants viewed video files of BTPP ads. Respondents were asked how frequently they have seen the ad on television in the past six months. Response categories ranged from 1 (never) to 5 (very often). Respondents then answered questions designed to measure how receptive they were to the ads. For example a series of questions including whether the ad grabbed their attention; made them stop and think of quitting smoking; gave them good reasons not to smoke; or if they liked the ad or were measured on a scale from 1 (strongly disagree) to 4 (strongly agree). Another series of questions including whether they believed the ad was depressing, powerful, annoying, believable, helpful, or disturbing were measured on a scale from 1 (not at all) to 5 (very).

Analysis

When the data collection was complete, Harris Interactive weighted the data to the population of Florida adult smokers and delivered the de-identified dataset to RTI. RTI cleaned and recoded data as needed (e.g. created variables such as smoking status, aggregated age groups, etc). Descriptive statistics were generated for all variables. We conducted bivariate analyses to assess whether exposure to and attitudes about tobacco industry marketing activities varied by smoking behavior characteristics.

3. RESULTS

This section summarizes the results of the 2009 OSS. We begin with a description of the survey respondents' demographic characteristics and smoking behaviors, followed by smokers' awareness of new tobacco products; their exposure to and attitudes about tobacco marketing strategies; and their awareness and receptivity to anti-tobacco counter-marketing ads.

Demographic and Smoking Behaviors

Demographic Characteristics and Individual Behavior

Table 3-1 summarizes the demographic characteristics and smoking behaviors of the OSS respondents. The 2009 OSS surveyed 502 adult smokers in Florida. Of these, 55.3% were female and 63.5% were between the ages of 40 to 64. Respondents were mainly White (89.5%) and have completed high school (41.3%) or some college (36.3%) education.

The survey respondents were fairly heavy smokers with 45.8% smoking more than a pack or more a day (20+ cigarettes). Almost 46% of respondents had made a quit attempt in the past year, with 43.4% using nicotine replacement therapy (43.4%) and 11.8% visiting a cessation-related website. Few respondents used cessation classes, counseling, or a quitline to assist them in their quit attempt. At the time of the survey 64.5% of respondents were contemplating making a quit attempt and 24% of respondents were preparing to make a quit attempt.

On average, respondents watched 6.8 hours of television per day and over 40% read a magazine at least once a week. Most respondents visit a grocery (78.2%) and convenience store (56.8%) at least once a week. Few respondents frequent bars or clubs regularly or have attended a tobacco sponsored event in the last year.

Table 3-1. Online Smokers' Survey Descriptive Statistics (n=502)

<i>Demographic Characteristics</i>	%	95% CI
Gender		
Female	55.3	[49.0, 61.5]
Male	44.7	[38.5, 51.0]
Race (n=497)		
White	89.5	[84.4, 93.2]
Black	2.2	[0.8, 6.0]
Hispanic	4.9	[2.5, 9.6]
Other	3.3	[1.8, 6.0]
Age		
25-39	16.2	[11.6, 22.1]
40-64	63.5	[57.1, 69.4]
65+	20.4	[16.0, 25.6]
Educational Attainment		
Less than high school	3.6	[1.6, 7.7]
High school	41.3	[35.0, 47.9]
Some college	36.3	[30.9, 42.1]
College graduate +	18.8	[14.7, 23.7]
<hr/> <i>Smoking Characteristics</i> <hr/>		
Daily Cigarette Consumption		
Less than 10 cigs a day	20.5	[15.7, 26.2]
10 to 19 cigs a day	33.7	[28.0, 40.0]
20 or more cigs a day	45.8	[39.7, 52.1]
Made a quit attempt in the past year	45.6	[39.4, 51.9]
Type of cessation resource used*		
Used NRTs	43.4	[34.2, 53.1]
Attended cessation class	0.8	[0.3, 2.0]
Received counseling	4.0	[1.9, 8.4]
Used telephone quit line	2.8	[1.3, 6.2]
Visited cessation related website	11.8	[7.6, 17.8]
Prochaska's Stages of Change		
Precontemplation	11.5	[7.9, 16.3]
Contemplation	64.5	[58.2, 70.4]
Preparation	24.0	[18.9, 30.0]
<hr/> <i>Media Usage</i> <hr/>		
TV usage on typical day in past 30 days (hours)	6.8	[6.0, 7.6]
Personal Internet usage during a typical week	10.6	[8.5, 12.7]
Magazine readership in past 30 days (n=500)		
Once a week or more	43.3	[37.1, 49.6]
Three times a month or less	56.8	[50.4, 62.9]

Shopping Habits

Visit at least once a week		
Grocery store	78.2	[72.7, 82.9]
Convenience store	56.8	[50.6, 62.8]
Drug store	35.8	[30.0, 42.1]
Tobacco discount store	9.4	[6.3, 13.7]

Events & Entertainment

Visits Bars or clubs at least once a week	8.1	[5.5, 11.9]
Attended a Tobacco sponsored event in the last year	3.9	[1.9, 7.8]

* Among those making a quit attempt

New Products

To track Florida smokers' exposure to new products, the OSS assessed whether survey participants have heard of new products such as snus, Taboka, tobacco lozenges/ strips, or e-cigarettes. Approximately 49% of respondents have heard of at least one new product. Respondents were most aware of e-cigarettes (29.6%) followed by Camel or Marlboro Snus (24.1%) and tobacco lozenges or strips (21.6%). Only 9.3% of respondents have used any of these products in the last year and 63.5% of respondents were unsure whether these products are more or less harmful than regular cigarettes (Table 3-2).

Table 3-2. New Product Awareness and Use among Florida Adult Smokers (n=501)

	%	95% CI
Ever heard of any new tobacco product	49.0	[42.8, 55.3]
Ever heard of		
e-cigarettes	29.6	[24.3, 35.4]
Camel or Marlboro Snus	24.1	[19.1, 29.9]
tobacco lozenges or strips	21.6	[16.9, 27.3]
Taboka	0.3	[0.1, 0.9]
Used any new products in past 12 months	9.3	[5.9, 14.3]
New products compared to regular cigarettes		
More harmful	1.4	[0.4, 4.4]
Less harmful	15.8	[11.5, 21.5]
Equally harmful	19.3	[14.7, 24.9]
Don't know	63.5	[57.1, 69.5]

Tobacco Purchasing Behavior

Florida smokers' tobacco purchasing behaviors are summarized in Table 3-3. Almost half of the smokers in the sample sought out less expensive cigarettes than they could buy in their local store. Nearly 60% of smokers received promotions or coupons in the mail from tobacco companies and many used these coupons (44.1%). More smokers used coupons for their usual brand of cigarettes (38.4%) rather than another brand (15.5%). Smokers do not often buy brands other than their usual brand. Nearly 20% often or always take advantage of special promotions in stores.

Table 3-3. Purchasing behavior of Florida Smokers

	%	95% CI
Made special effort to buy cheaper cigarettes	47.6	[41.4, 53.9]
Received coupons or promotional items in the mail from tobacco companies in past 12 months	58.5	[52.2, 64.5]
Use coupons sent by tobacco companies often	44.1	[35.9, 52.7]
Used coupon, rebate, special offer for usual brand of cigarettes in past 30 days	38.4	[32.4, 44.8]
Used coupon, rebate, special offer for non-usual brand of cigarettes in past 30 days	15.5	[11.4, 20.8]
Buy brands other than usual brand often	5.6	[3.3, 9.3]
Took advantage of in-store special promotions often/always in past 30 days	20.1	[15.5, 25.7]

Exposure to and Attitudes about Tobacco Industry Marketing Practices

Exposure

Overall, Florida smokers have a low level of awareness about tobacco industry marketing activities. Smokers were most aware of tobacco ads in retail stores, followed by tobacco advertisements in magazines. They almost never noticed that tobacco companies donate money to charity or advertise on the Internet (Table 3-4).

Table 3-4. Awareness of tobacco industry marketing in magazines, retail stores, events, online and charitable donations

Item	% [95% CI]				
	Never	Rarely	Some-times	Often	Always
In past 30 days how often did you notice tobacco ads in magazines ?	57.1 [50.8, 63.2]	27.4 [22.2, 33.2]	12.3 [8.5, 17.5]	2.2 [1.0, 4.7]	1.0 [0.2, 4.6]
In past 30 days how often have you seen cigarettes advertised in spam e-mails ?	81.6 [76.4, 85.9]	10.1 [6.9, 14.6]	6.2 [3.8, 9.9]	1.4 [0.6, 3.3]	0.7 [0.2, 2.6]
In past 30 days how often have you seen cigarettes advertised in pop-up/banner ads ?	89.2 [85.0, 92.3]	7.5 [5.0, 11.0]	2.4 [1.0, 5.3]	0.7 [0.2, 2.1]	0.3 [0.0, 2.0]
In past 30 days how often have you seen cigarettes advertised on websites ?	81.7 [76.5, 85.9]	10.4 [7.2, 14.8]	4.7 [2.8, 7.7]	2.6 [1.2, 5.6]	0.7 [0.2, 2.2]
In the past 30 days how often have you noticed in-store tobacco ads?*	32.0 [26.6,37.9]	8.1 [5.2,12.3]	15.8 [11.5,21.3]	18.4 [13.8,24.2]	14.0 [10.2,18.9]
How often did you notice cigarette brands displayed at events in past 12 months?	33.0 [7.0,76.3]	25.1 [5.4,66.3]	37.3 [9.4,77.4]	1.8 [0.2,17.0]	2.8 [0.3,24.5]
In past 12 months how often did you notice cigarette companies had donated money to charities ?	88.1 [83.3,91.7]	7.8 [5.0,12.2]	2.9 [1.3,6.1]	0.6 [0.2,2.1]	0.5 [0.2,1.4]

*Note: 11.7% of respondents had not visited retail stores in the past 30 days.

Smokers' Attitudes and Social Norms

Overall, smokers feel that tobacco industry marketing activities are acceptable and think their peers agree. Table 3-5 summarizes respondents' attitudes and perceived social norms about the acceptability of tobacco industry marketing. On average, smokers had more favorable attitudes about tobacco industry marketing at events, contributions to charities, and direct mail consumer marketing than any of the other marketing strategies. Smokers are most ambivalent about advertising in magazines and in bars and clubs. On average,

smokers perceived other adults to have similar attitudes about these marketing strategies as themselves.

Table 3-5. Florida Smokers' Attitudes and Perceived Social Norms with regard to Tobacco Industry Marketing

	% [95% CI]				
	Totally acceptable	Somewhat acceptable	Neither acceptable nor unacceptable	Somewhat unacceptable	Totally unacceptable
How do you feel about having tobacco products advertised in magazines ?	24.8 [19.9,30.5]	10.4 [7.0,15.2]	41.6 [35.6,47.9]	8.0 [5.3,11.9]	15.1 [10.9,20.5]
How do the adults you spend time with feel about having tobacco products advertised in magazines ?	17.4 [13.0,22.8]	8.0 [5.3,11.9]	57.9 [51.5,63.9]	6.8 [4.3,10.7]	10.0 [6.7,14.6]
How do you feel about tobacco companies sending things like coupons or other promotional items in the mail ?	50.3 [44.0,56.6]	16.0 [11.6,21.7]	21.9 [17.2,27.3]	3.5 [2.1,6.0]	8.3 [5.3,12.9]
How do the adults you spend time with feel about tobacco companies sending things like coupons or other promotional items in the mail ?	36.6 [30.9,42.8]	12.8 [9.0,18.1]	36.6 [30.9,42.7]	4.0 [2.2,6.9]	9.9 [6.4,15.1]
How do you feel about having cigarette brands on display at events at sports or athletic events, rodeos, or music festivals ?	61.2 [22.0,89.8]	20.3 [2.2,74.4]	18.5 [4.0,55.2]	0.0	0.0
How do the adults you spend time with feel about having cigarette brands on display at sports or athletic events, rodeos, or music festivals ?	38.7 [10.0,78.2]	42.8 [11.8,80.7]	18.5 [4.0,55.2]	0.0	0.0
How do you feel about having cigarette companies donate money to charities or to cultural, entertainment, and arts organizations ?	63.2 [56.9,69.0]	11.8 [8.3,16.6]	18.2 [13.9,23.5]	3.6 [1.8,6.9]	3.3 [1.5,6.9]
How do the adults you spend time with feel about cigarette companies donating money to charities or to cultural,	41.6 [35.6,47.8]	12.6 [8.8,17.6]	40.2 [34.2,46.6]	3.2 [1.7,6.0]	2.5 [1.1,5.6]

entertainment, and arts organizations?					
How do you feel about having tobacco products advertised in retail stores?	41.1 [35.2,47.3]	15.6 [11.4,21.1]	31.9 [26.3,38.1]	6.3 [3.8,10.4]	5.0 [2.9,8.4]
How do the adults you spend time with feel about having tobacco products advertised in retail stores?	29.5 [24.3,35.3]	9.3 [6.2,13.8]	49.5 [43.2,55.8]	7.3 [4.4,11.8]	4.5 [2.5,7.7]
How do you feel about tobacco companies giving away things like free samples or promotional items at bars or nightclubs?	38.4 [32.6,44.6]	17.2 [12.8,22.8]	26.8 [21.7,32.7]	9.7 [6.6,14.0]	7.8 [4.9,12.4]
How do the adults you spend time with feel about tobacco companies giving away things like free samples or promotional items at bars or nightclubs?	26.3 [21.4,31.7]	12.0 [8.3,17.0]	45.4 [39.2,51.8]	8.5 [5.4,13.1]	7.9 [4.9,12.2]

Table 3-6 summarizes respondents' attitudes and perceived social norms about regulating tobacco industry marketing. On average, respondents were against policies that would regulate tobacco industry marketing practices and perceive their peers to have similar attitudes. Respondents felt most strongly against banning tobacco industry donations to charities and tobacco industry direct mail coupons. Smokers were most ambivalent about banning advertisements in magazines.

Table 3-6. Florida Smokers' Attitudes and Social Norms about Regulating Tobacco Industry Marketing Practices

	% [95% CI]				
	Strongly against	Somewhat against	Neither in favor nor against	Somewhat in favor	Strongly in favor
What is your opinion about a policy that would ban advertisements for tobacco products from magazines?	19.3 [15.1,24.3]	13.1 [9.2,18.3]	41.3 [35.2,47.6]	10.7 [7.6,15.0]	15.6 [11.5,20.9]
What do the adults you spend time with think about a policy that would ban advertisements for tobacco	11.6 [8.4,15.8]	7.6 [5.0,11.2]	59.8 [53.5,65.7]	9.9 [6.6,14.6]	11.2 [7.7,16.1]

products from **magazines?**

What is your opinion about a policy that would ban tobacco companies from sending things like coupons or other promotional items in the mail?	45.4 [39.2,51.7]	13.8 [10.2,18.5]	25.6 [20.3,31.6]	5.5 [3.6,8.5]	9.7 [6.3,14.5]
What do the adults you spend time with think about a policy that would ban tobacco companies from sending things like coupons or other promotional items in the mail?	29.0 [23.8,34.8]	12.2 [8.8,16.8]	42.4 [36.3,48.7]	8.0 [5.2,12.2]	8.4 [5.3,13.2]
What is your opinion about a policy that would ban tobacco companies from displaying cigarette brands at sports or athletic events, rodeos, or music festivals?	44.2 [12.8,81.1]	26.0 [4.4,72.9]	27.5 [6.2,68.5]	0.0	2.2 [0.2,20.1]
What do the adults you spend time with think about a policy that would ban tobacco companies from displaying their brands at brands at sports or athletic events, rodeos, or music festivals?	44.2 [12.8,81.1]	26 [4.4,72.9]	27.5 [6.2,68.5]	0.0	2.2 [0.2,20.1]
What is your opinion about a policy that would ban tobacco companies from donating money to charities or to cultural, entertainment, and arts organizations?	57.8 [51.4,63.9]	14.9 [10.5,20.6]	18.8 [14.6,23.9]	3.5 [1.7,7.0]	5.1 [2.8,9.1]
What do the adults you spend time with think about a policy that would ban tobacco companies from donating money to charities or to cultural, entertainment, and arts organizations?	37.7 [32.0,43.9]	11.7 [8.2,16.6]	43.4 [37.2,49.7]	4.1 [2.2,7.7]	3.0 [1.4,6.6]
What is your opinion about a policy that would ban tobacco advertising in retail stores?	36.3 [30.6,42.5]	18.1 [13.4,24.0]	32.5 [27.0,38.7]	5.7 [3.6,8.8]	7.4 [4.7,11.4]
What do the adults you spend time with think about policies that would ban tobacco advertisements from retail stores?	27.0 [22.0,32.6]	12.4 [8.7,17.5]	48.4 [42.2,54.7]	6.1 [3.5,10.4]	6.1 [3.7,9.9]

What is your opinion about a policy that would ban tobacco companies from giving away things like free samples or promotional items at **bars or nightclubs**?

39.6	14.0	27.2	8.9	10.3
[33.7,45.8]	[10.0,19.2]	[22.0,33.2]	[5.9,13.0]	[6.8,15.3]

What do the adults you spend time with think about policies that would ban tobacco companies from giving away things like free samples or promotional items at **bars or nightclubs**?

30.1	9.4	44.5	9.6	6.3
[24.9,36.0]	[6.2,13.9]	[38.4,50.9]	[6.3,14.4]	[3.9,10.0]

Counter-marketing Efforts in Florida

Level of Awareness and Exposure

Table 3-7 presents data on awareness of and frequency of exposure to BTPP counter-marketing advertisements that were televised in 2009.

Table 3-7. Awareness and Frequency of Exposure to BTPP Ads in 2009

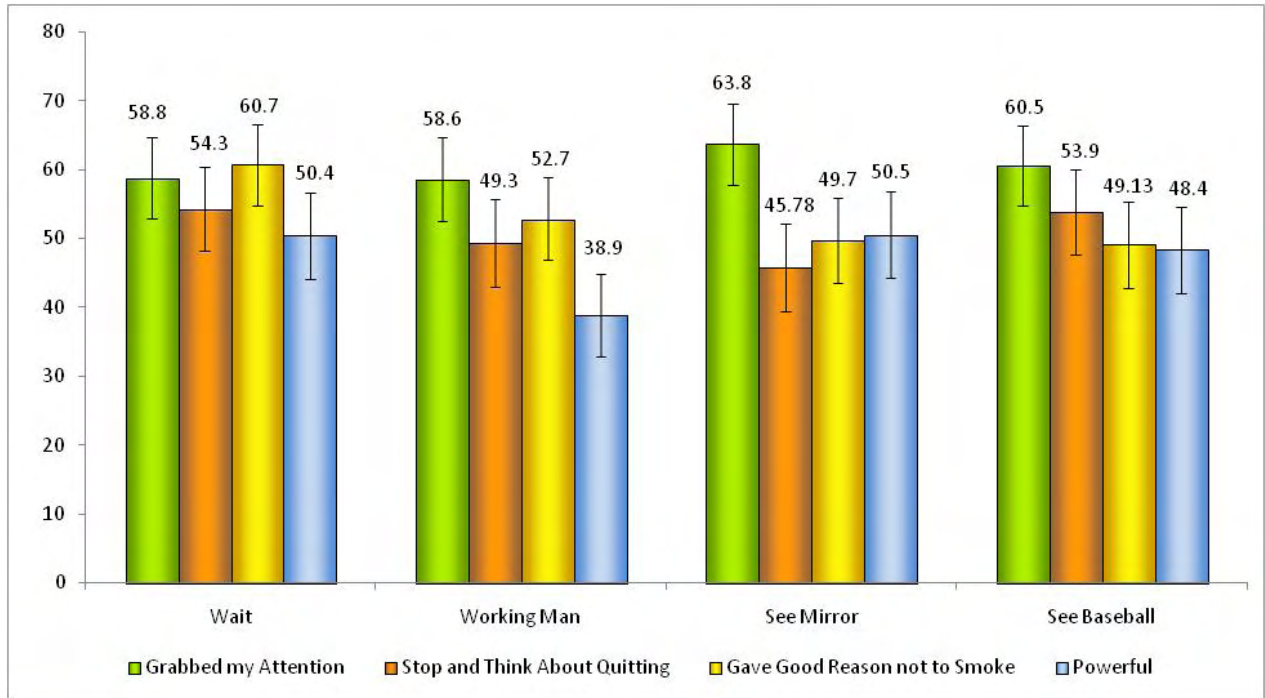
Ad	Saw ad in last 6 months		Saw ad often/very often	
	%	95% CI	%	95% CI
Any ad	59.0	[52.7,65.0]	11.5	[8.0,16.2]
<i>See Baseball</i>	44.7	[38.6,51.1]	4.5	[2.5,8.1]
<i>Working man</i>	34.8	[29.2,40.9]	7.1	[45.1,11.0]
<i>See Mirror</i>	23.5	[18.6,29.2]	2.3	[1.0,5.5]
<i>Wait</i>	6.5	[4.1,10.0]	0.8	[0.3,2.0]

Nearly 60% of smokers reported seeing any BTPP advertisement in the past 6 months. Smokers were most aware of the *See Baseball* ad (44.7%) followed by the *Working Man* ad (34.8%) and *See Mirror* (23.5%). Few respondents reported seeing these ads frequently (often or very often).

Florida Smokers' Reactions to Tobacco Countermarketing Campaign

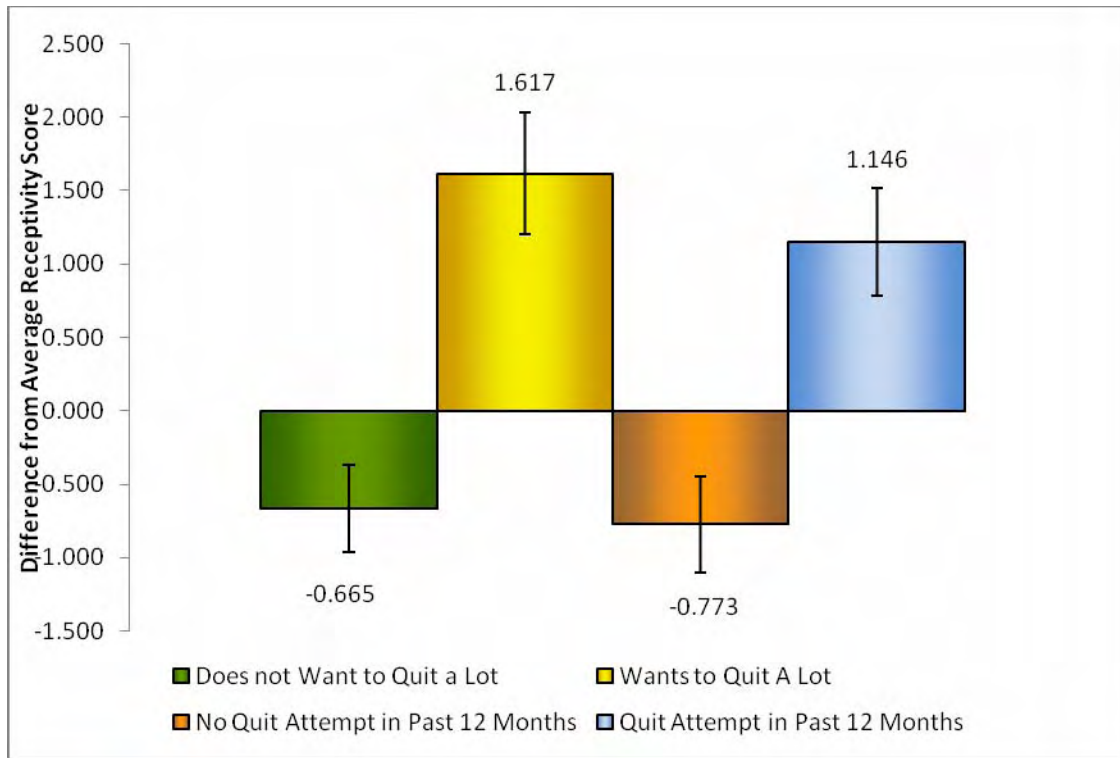
Figure 3-1. provides details on Florida smokers' reactions to the anti-tobacco counter-marketing campaign ads. Respondents appear to most receptive to the *Wait* ad, which ranked highest in terms of making smokers stop and think about quitting, giving them a good reason to quit smoking, and being powerful.

Figure 3-1. Percent of Respondents who Agree or Strongly Agree in Response to BTPP Counter-Marketing Ads (%)



By evaluating different subgroups of smokers with regard to the measure of receptivity, we are able to identify whether different types of smokers respond differently to cessation advertisements. To explore this possibility, we categorized smokers based on whether they made a quit attempt during the past 12 months and whether they currently want to quit “a lot,” and used these delineations when examining receptivity to BTPP anti-tobacco advertisements. We find that smokers who were most motivated to quit were significantly more receptive to ads than those who were less motivated to quit (Figure 3-2). Similarly, smokers who had made a quit attempt in the past 12 months were more receptive to the ads than smokers who did not make a quit attempt over the same period. There were similar patterns for other indicators of smoking behavior, including daily cigarette consumption and intentions to quit smoking in the next 30 days. These findings are similar to results in other states where we have found that smokers who consume fewer daily cigarettes, have greater intentions to quit smoking, and are less committed to smoking are significantly more receptive to cessation advertisements.

Figure 3-2. Difference from the Average Receptivity Score for All BTPP Advertisements by Desire to Quit and Making a Quit Attempt in the Past 12 Months



Over time we will be able to measure the impact of the BTPP campaign through use of the OSS. These results provide an initial baseline assessment of Florida smokers' awareness, exposure and receptivity to the ads.

4. DISCUSSION

This report provides a baseline assessment of Florida smokers' awareness and attitudes about tobacco industry marketing practices and BTPP counter-marketing ads. Results from this survey reveal that respondents have moderate awareness of new tobacco products. They are largely unaware about whether these products are more or less harmful than traditional cigarettes. As such, BTPP has a unique opportunity to educate Florida residents about the dangers of these new products and to effectively counter any misleading health claims made by the tobacco industry about the reduced health risk of new products.

Overall, Florida smokers have low awareness of tobacco industry marketing practices. Not surprisingly, respondents were most aware of tobacco advertising in retail stores, since consumers on average visit stores more frequently than other venues such as bars, clubs, or sponsored events where the tobacco industry markets their products. BTPP should consider policies that limit or restrict tobacco advertising in retail stores. Under the new Food and Drug Administration regulation, local and state governments have a unique opportunity to introduce legislation to regulate advertising and sales of tobacco products.

Florida smokers are also loyal to their usual brand of cigarettes and often use coupons for that brand when possible. A majority of the smokers receive coupons from tobacco companies in the mail, and are also against regulating these direct-mail marketing programs. Smokers believe that most tobacco industry marketing activities are acceptable and are against regulating these activities. Smokers were least opposed to regulating tobacco advertising in magazines. However, few smokers are exposed to tobacco ads in magazines, so regulating this channel may be a low priority for BTPP.

Awareness of BTPP's anti-tobacco ads is low, but the ads are favorably received by most smokers. Over half of the respondents indicated that the ads grabbed their attention, gave them a good reason not to smoke, and made them stop and think about quitting. However, smokers who are less open to quitting (i.e., have not made quit attempts and have weaker desire to quit) were less responsive to anti-tobacco ads compared to other smokers. BTPP should consider systematically testing various ads to assess which ads may be more effective for reaching smokers who are resistant to quitting. To influence cessation, evidence has shown that an awareness level of 60% is necessary (Hornik, 2002). Achieving this level of awareness may require higher intensity of campaign ads and effectively running ads that are most likely to garner attention.

This report provides a baseline assessment of Florida smokers' awareness and receptivity to pro-tobacco and anti-tobacco marketing influences. The OSS will be repeated annually for the duration of the evaluation contract, which will allow us to compare changes in Florida smokers' awareness and attitudes about tobacco industry marketing activities over time.

5. REFERENCES

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