

# Store Alert Report Card

## Step-by-step guide

This guide will walk you through each item on the Store Alert Report Card. It may be helpful to have a copy of the Report Card in front of you while reading the information in this guide.

### Store name and address

Fill in the name and address of the store in the space provided at the top of the Store Alert report card.

### Type of store

The observer must enter a store and observe the types of goods that it sells in order to determine store type. Do not judge store type by the name of the store. Choose one type of store on the report card, using the criteria below.

**Convenience store:** A small independently-owned or chain store that sells convenience items, including fresh milk. May have a deli, or sell some hot food (hotdogs or sandwiches), but does not sell fresh (raw) meat that must be taken home and cooked, such as a steak or chicken breast. *Examples* of chain convenience stores include: 7-Eleven, AM/PM, WaWa and Casey's General Store.

**Convenience/Gas:** A small independently-owned or, more likely, a chain gas station that also sells convenience items, including fresh milk. Must have gas pumps and a convenience store to be included in this category. *Examples* of chain convenience /gas locations include Speedway, Exxon "Tiger Mart," Texaco Convenience Shop, Conoco Jet, Mobil Mart, and Starvin' Marvin'.

**Gas Station:** A chain or independently-owned gas station that does not have an attached store/convenience area. They might have a small booth or kiosk where they sell maps, gum, candy, or cigarettes but they do not sell fresh milk.

**Grocery:** A small privately-owned grocery store. Must sell fresh (raw) meat as well as fresh milk to qualify as a grocery instead of a convenience store.

**Supermarket:** A large store, usually part of a chain, that sells food and other household items. Supermarkets, as distinguished from grocery stores, contain at least one store within a store, with its own cash register. If a store has a pharmacy, florist, dry cleaner, bank, etc. and you can pay for purchases in that specific area without going thru the general check-out lines at the front of the store, it is a supermarket.

*Examples* of chain supermarkets include Giant, Food Lion, Kroger and Safeway.

**Drug Store:** Drug stores have a pharmacy/prescription counter (usually in the back of the store). They also sell many other items, such as food, small housewares, gift wrap, cards, cosmetics, perfume, magazines, school supplies, and infant and pet care items. *Examples* of chain drug stores include CVS, Rite Aid, Eckerd, and Walgreens.

**Liquor Store:** A store that predominantly sells alcohol products (beer, wine or liquor/spirits). Depending on the state, liquor stores may be government-owned or privately-owned.

**Pharmacy:** A privately-owned or chain store that primarily dispenses prescription medication. A pharmacy may sell other items but almost all are related to personal or medical care. (Examples: over-the-counter medicines, vitamins, bandages, crutches, slings, eye drops, etc.) Although they may also devote a little space to candy or postcards, they do not offer the variety of items that a drug store does. *Examples* of chain pharmacies include Neighbor Care and Medicine Shoppe.

**Tobacco Store:** A store that primarily sells tobacco products. May sell any combination of cigarettes, cigars, pipe tobacco, and sometimes smoking paraphernalia (matches, lighters, cigarette papers, etc.). Discount cigarette stores fall into this category, as well as pipe tobacco or cigar shops.

**Other:** A store that does not fall into any of the above categories should be coded as “other.” This includes music, gift, novelty, candy, import, and T-shirt stores as well as restaurants, bars and donut shops.

### **Are any schools visible from this store?**

For any kind of store, you will also note on the report card whether you can see a school while standing on the store’s property. Check the correct box, either “yes” or “no.”

## **Exterior observations**

If you note any of the following on the outside of the store (on the building, in the parking lot, on the sidewalk, on an outdoor sign, on the fence, etc), circle the appropriate value on the Store Alert report card.

### **Tobacco Advertising**

An advertisement, or ad, is any representation of a product. Ads may be audible (ads that you hear), graphic (pictures or images) or print (words or text). An ad may have a picture of the product, the product name, the product logo, or any combination of these items. There are also some ads for cigarettes or other tobacco products that don’t mention any particular brand name. Ads serve no other purpose than to attract and arouse interest in the product.

**Any tobacco ads?** If you see any advertisements on the outside of the store or on its property for any form of tobacco (cigarettes, chew, cigars, etc), circle “1.”

**Any with “special” price?** These ads indicate that the price is a special or limited time offer. They may contain words like “special value,” “special offer,” “discount,” “cents off,” “reduced price,” “save \$\_\_\_\_,” “special promotions,” “promotional offer.” Ads that merely state the item’s price or use words like “everyday low price” or “value brand” are **NOT** ads with “special” price. Do **not** include multi-pack discounts as ads with “special price” - they are counted separately (see below). Circle “1” if you see one or more ads for a special price on the outside of the store or on its property.

**Any with a multi-pack discount?** These ads indicate that the customer must buy more than one pack to get the discounted price. Common examples are “buy two packs, get one free,” “two for the price of one,” “free pack with a carton,” “buy two packs and save \$1.00.” Circle “1” if you see one or more ads on the outside of the store or on its property that offer a multi-pack discount on tobacco.

**Any with a free gift with purchase?** These ads indicate that something is given to the customer with the purchase of cigarettes. Popular items include lighters, bottle openers, key chains, or mini-radios. (Note: The outdoor ad may not tell you what the free gift is.) Free gifts with purchase are given at the time of purchase, so they do not include mail-in offers, contests, prizes or “points” programs such as Marlboro Miles, Camel Cash or the Virginia Slims catalog. Most stores do give matches to customers, but these should not be counted as a gift with purchase. Circle “1” if you see one or more ads on the outside of the store or on its property that offer a free gift with purchase of tobacco.

**Any illuminated?** An ad is illuminated if any part has neon, back-lighting or other lighting to attract attention. Circle “1” if you see one or more illuminated ads outside the store or on its property.

**Any mechanical?** Mechanical ads use moving parts to attract customer interest. Sometimes they make the ad or product spin or wave back and forth. Circle “1” if you see one or more mechanical ads outside the store or on its property.

**Any audible?** Audible ads are a relatively new strategy that we’ve noticed in convenience & gas stores. Now that so many convenience & gas stores allow you to pay for the gas right at the pump, they broadcast recorded messages to get you to come into the store. They may announce specials on candy or sodas, but we are interested in announcements about tobacco products in general (“Come on in, we have your favorite cigarette brands,” “We have the lowest cigarette prices in town”) or statements about specific brands (“This week we’re featuring Marlboro cigarettes”). Circle “1” if you hear one or more while you’re outside the store or on its property.

**Any at child’s eye level?** Child’s eye level is defined as anything below 3 feet, or about hip-high on an adult. Look on the lower portion of the door, below the windows of the store, near the gas pumps, on the parking lot and circle “1” if you see one or more ads at child’s eye level outside the store or on its property.

**Any on the door?** The entrance is a strategic position for ads because you cannot go into the store without seeing them. Circle “1” for this item if you see ads on the door that are visible from the outside of the store. Note: The door is also a common place to see “We Card” or “Don’t buy cigarettes for children” signs. Although these may have a cigarette company name on them, for the purposes of this project, they are not considered advertisements

**Any at the street?** Look on the edge of the property, near the street or sidewalk. And circle “1” if you see any ads there. Ads at the street are designed to attract people who are driving, walking, or riding by the store.

**Level of Advertising:** For this item, use your own judgment to describe the amount of tobacco advertising on the exterior of the store and on its property. (Do not include ads for other products like soda or snacks.) Considering all the tobacco advertising, what kind of visual impact does it make on the community? Choose only one of the following:

**Discreet level of advertising?** Circle “1” if there are very few ads or if they are subtle or small.

**Moderate level of advertising?** Circle “2” if tobacco ads provide some visual impact.

**“In your face” level of advertising?** Circle “3” if there are many ads or if they are bold or large. “In your face” advertising provides very strong visual impact.

### **Functional Objects**

Functional objects are items with a cigarette brand name or logo that serve a purpose in addition to merely advertising the product. Exterior functional objects might include signs that state the store hours, pull/push signs, trashcans, clocks, etc.

**Are there any functional items?** Circle “1” for this item if there are any functional items at all outside the store.

**Any on or near the door?** This area is important because you must pass through it to make a purchase. Circle “1” if one or more functional objects can be seen on or near the exterior of the door.

**Any illuminated?** Circle “1” for this item if any of the functional items also have neon, back-lighting or other lighting.

### **Total Exterior Score**

Exterior score can be tallied when all exterior observations are complete. You may also wait and total the scores when you have also completed the interior observations.

---

## **Interior observations**

To make the interior observations, you must look all around the inside of the store. Tobacco may be at the counter, but it might also be in an aisle. We’ve even found chewing tobacco in a refrigerated cabinet!

### **Tobacco Placement**

**At child’s eye level?** Circle “1” for this item if you see any tobacco products at child’s eye level. Child’s eye level is defined as less than 3 feet, or about counter level, or hip-high on an adult. Look at the area in front of the cash register, at the end of store aisles, near the door, etc.

**Self-service?** Circle “1” for this item if the customer can reach out and pick up the tobacco product without getting help from a store clerk. Self-service displays are often near the cash register, but may be in a special display or in an aisle.

**Within 12” of candy or toys?** Tobacco products displayed within 1 foot of candy or toys attract children’s attention. Circle “1” for this item if you see this situation anywhere in the store.

**Within 12” of cash register?** The area around the cash register is prime real estate because everyone must approach the cash register to make purchases. Circle “1” for this item if the tobacco products are located on the counter, in displays, or on shelves that are within 12” of the cash register. This does not include overhead industry shelving (see below). Also, lottery machines should not be considered as cash registers.

**Any full-front carton displays?** Displaying the fronts of cartons of cigarettes doesn’t use space efficiently but it does make them very visible. Circle “1” if cigarette cartons are displayed so that the large, flat top of the carton is facing outward, towards the customer. Note that this refers to cartons (boxes of 10 packs of cigarettes), **not** individual packs of cigarettes (which are often displayed full-front).

### **Industry Shelving**

Industry shelving is used to display or store cigarettes and has at least one cigarette brand name or logo. Industry shelving is often comprised of large racks against the wall or overhead bins located above the register. They may be built-in or free-standing but cannot be reasonably picked up and moved with one hand.

**Number of industry shelving units (count):** Look for vertical divisions that separate individual shelving units. Count each unit that could stand by itself and enter that number into the open box. (Note: You will then multiply the number of units by two, as indicated on the report card, to determine the point value here.)

**Any illuminated?** Circle “1” for this item if any part of an industry shelving unit has back-lighting, or if the unit includes neon or other lighting.

**Any contain a functional object?** Look at the industry shelving and if it includes a functional object, such as a clock, circle “1.” Remember, functional objects are items that serve a purpose in addition to merely advertising the product.

### **Industry Movable Displays**

Industry movable displays must have at least one cigarette brand name or logo and can be picked up and moved with one hand. They may be made of plexiglass, cardboard, metal, or plastic. Smaller displays are often on or behind the counter. Larger movable displays are usually on the floor.

**Number of movable displays:** Count the number of individual movable displays and enter this number in the box provided on the report card.

**Any illuminated?** Circle “1” if any of the movable displays have back-lighting or include neon or other lighting.

**Any on the counter?** Circle “1” if any of the movable displays are on the counter.

### **Tobacco Advertising**

Remember, an advertisement, or ad, is any representation of a product. Interior ads are usually graphic (pictures or images) or print (words or text). An ad may have a picture of the product, the product name, the product logo, or any combination of those items. There might also be ads for cigarettes or other tobacco products that do not list a particular brand name. Ads serve no other purpose than to attract attention and stimulate interest in the product.

**Any tobacco ads inside the store?** Look all around the inside of the store and circle “1” if you see one or more tobacco ads.

**Location of advertising:** Choose one of the following options to describe where the tobacco advertising is in the store:

**Ads only where tobacco is sold?** Circle “1” if the ads are only located near the tobacco products.

**Ads in other parts of the store?** Circle “2” if there are some ads in other parts of the store as well.

**Ads everywhere you look?** Circle “3” if tobacco ads clutter virtually the entire store.

**Any with “special” prices?** These ads indicate that the price is a special or limited time offer. They may contain words like “special value,” “special offer,” “discount,” “cents off,” “reduced price,” “save \$\_\_\_\_,” “special promotions,” “promotional offer.” Ads that merely state the item’s price or use words like “everyday low price” or “value brand” are **NOT** ads with “special” price. Do not include multi-pack discounts as ads with “special price”- they are counted separately (see below). Circle “1” if you see one or more ads for special price on the inside of the store.

**Any with a multi-pack discount?** These ads indicate that the customer must buy more than one pack to get the discounted price. Common examples are “buy two packs, get one free,” “two for the price of one,” “free pack with a carton,” “buy two packs and save \$1.00.” Circle “1” if there are multi-pack discount ads inside the store.

**Any with free gift with purchase?** These ads indicate that something in addition to the tobacco is given to the customer at the time of purchase. Popular items include lighters, bottle openers, key chains, or mini-radios. Gift items are often displayed with the tobacco product or even packaged with the product. Most stores do give matches to customers, but these should not be counted as a gift with purchase. Do not include mail-in offers, contests, prizes or “points” programs such as Marlboro Miles, Camel Cash or the Virginia Slims catalog here. Circle “1” if the interior of the store has any ads for a free gift with purchase of tobacco.

**Any illuminated?** An ad is illuminated if any part of the advertisement (often in the form of a sign) has back-lighting, neon, or other lighting. Circle “1” if any of the interior ads has lighting.

**Any mechanical?** Mechanical ads have moving parts to attract customer attention. Sometimes they make the ad or product spin or wave back and forth. Circle “1” if one or more of the ads move.

**Any at child’s eye level?** Circle “1” for this item if you see any tobacco advertisements below 3 feet, or about counter height, or about hip-high on an adult. Look at the area in front of the cash register, on the inside of the doors, in the aisles, on the refrigerator doors, on the walls, etc.

### **Functional Objects**

Functional objects are items with a cigarette brand name or logo that serve a purpose in addition to advertising the product. Interior functional items might include clocks, change mats, coin trays, calendars, etc. (Note: Do not include “We Card” or other proof-of-age calendars.)

**Are there any functional items?** Circle “1” for this item if there are one or more functional items inside the store.

**Any illuminated?** Circle “1” if any of the functional items (a clock, for example) has back-lighting, neon, or other lighting.

**Any grocery baskets with tobacco ads?** Some hand-held shopping baskets have tobacco brand names or logos. These can’t be seen by the person who is carrying the basket, but they put tobacco company names and logos right at the eye level of children. Circle “1” if the store has this functional object.

### **Total Interior Score**

Interior score may be calculated once all interior observations are complete.

### **How many cash registers?**

Count the number of cash registers in the store but don’t include lottery machines or cash registers that are used only for gas purchases. You will need this information in order to calculate your final score!

**This section explains how to calculate the point value for your local store and how your store compares with others.**

**Total Exterior:** In the bottom left corner of the Store Alert report card, record the total number of exterior points (Box #1).

**Total Interior:** Record the total number of interior points (Box #2).

**Grand Total:** Add the total exterior and the total interior and write the sum in both boxes labeled “Grand Total” (Box #4).

**# of Registers:** Enter the number of cash registers (Box #3)

**SCORE:** Divide the “Grand Total” by the “Number of Registers.” This is your FINAL SCORE!

**How does this store compare with others?** Look at the ranges provided and check the box that corresponds with the score for this store. The grade (A, B, C, D, F) listed shows how this store compares with other stores.

Stores that have higher grades do better jobs of limiting the public’s exposure to retail tobacco. Lower grades indicate that the store does not do a good job of protecting the community from tobacco advertising and products.

## Notes on Data Collection

If the Store Alert survey seems a bit daunting at first, don't worry. You may not realize it, but you're already familiar with survey research. Chances are, you've filled out survey information for the U.S. Census. You've probably been asked by marketing agencies for short in-person interviews in malls. Perhaps you've been phoned at home for telephone interviews. Self-administered surveys and in-person or phone interviews such as these are all valuable data collection methods.

The data collection method you will use for the Store Alert survey is called direct observation. You may be less familiar with this method than others, but it is a powerful way of collecting data. Battelle Centers for Public Health Research and Evaluation has used this method for many years to conduct research in stores. When we use direct observation, we don't have to rely on the opinion of an interview subject. For example, if we were to merely interview store owners about tobacco advertisements, they might "fudge" their answers in an effort to present their stores in a positive light. Direct observation allows us to avoid this form of bias and see the everyday, natural context of the store in the community. This is especially true if you do not announce to the retailers in your area that you will be conducting the Store Alert survey. If they know that you are coming to their stores to make observations about tobacco products and ads, they may clean up their property and your observations won't be true-to-life.

There are two ways to make direct observations. One is to be very upfront about what you are doing. It is perfectly OK to go into the stores with a clipboard and the Store Alert Report Card and record your answers in a very open and matter-of-fact way. If a clerk or manager asks you what you are doing, simply explain your project and continue your work. Nothing you will be doing is against any laws. However, be aware that some store owners may be uncomfortable with observers taking written notes in their stores and ask you to leave. If this happens, you may be unable to complete the interior part of survey. Even if you must leave the inside of the store, you can still make the exterior observations from the parking lot or street. It is for this reason that we recommend you start your survey inside the store first and then move on to the exterior of the store.

The second way to make direct observations is "under cover." This involves being discreet, so as not to alert others that the observation is taking place. This requires some practice, but can work very well. In either case, we recommend that observers have a letter of introduction. Explaining that you are gathering data for a research study can help to calm the fears of store staff.

Be careful of two problems when making direct observations: 1) remembering what you see and 2) recording the data correctly. Do not rely on your memory and leave a store without writing down all the information. There is a lot to look for and one person just can't remember everything. If you choose to make your observations "undercover," you can make a "cheat sheet" with a list of the items you need to observe and then transfer the information to the Store Alert Report Card once you get outside. However you decide to collect this information, fill out the Report Card and check it for errors *before* moving on to the next store. Always be sure that all information on the Report Card is accurate and complete. Working with a partner may make the job easier. You can divide up the interior observations to get them done quickly. And remember that stores are busy places – we don't want to bother store owners or customers.

*This letter might be printed on letterhead and signed from your partner agency (non-profit agency, local health department, etc.).*



Dear Retail Merchant,

We are conducting a research project regarding displays and advertising. This study requires us to make observations in retail outlets. The information that we gather is confidential and will be combined into statistical reports without any mention of store names or locations.

The data collectors visiting your establishment will make these observations without disrupting your work or your customers and will be in your store for only a few minutes.

Please accept our appreciation for your cooperation. Should you have any questions about this project, feel free to call me at \_\_\_\_\_.

Sincerely,

John Doe  
Tobacco Control Coordinator  
XYZ Health Department