

---

# DOCUMENT THE PROBLEM: Store Marketing

## *Prepare for the Ad Survey*

*Clearly identify the geographic area or your particular interest prior to conducting any surveys.*

### **Identify the Focus of Your Survey**

Before embarking on efforts to reduce tobacco advertising and marketing in stores in your community, it is important to document the extent of the problem. This step will provide you with valuable information you can use for clarifying your objectives, planning and implementing strategies and evaluating your efforts.

Ad surveys can be community-wide or focus on a particular area. In a small community, it may be possible to survey all stores that sell tobacco. In a large community, you may want to select a random sample of a subset of stores. You may be only interested in stores near schools and parks, or in certain types of stores. Or, you may want to pick specific neighborhoods. In San Francisco, for example, a group chose an “adopt-a-street” strategy. Or, you may want to group your area into political jurisdictions so you can present the results to specific policy-makers or political leaders.

If you are going to focus on a particular subset of stores, be sure to work with your evaluator to identify an appropriate “control” group so you will be able to say how your community or stores of interest are different or the same. For instance, if you are interested in assessing how the tobacco industry targets minority neighborhoods through documenting the amount of advertising in local stores, you also will need to survey stores in another community with similar laws and populations, but with a different ethnic population.

---

### **How to Find the Stores in Your Community**

At first glance, this may sound like an easy task. However, there is no single place you can go to obtain a complete, accurate list of stores in your community unless you have local ordinances that require the city to maintain a database of stores. Generally, eight types of stores sell tobacco:

- supermarket
- small market
- chain convenience with gas
- chain convenience with no gas
- gas only
- tobacco stores
- drug stores
- liquor stores

---

You can obtain lists of stores that sell tobacco from CDHS/TCS by county. Stores for specific cities can then be extracted according to the needs of the study.

Many of the stores on the CHDS/TCS list are not retail outlets. The list also includes home addresses of store owners, bowling alleys, pool halls, bars and restaurants. You will need to carefully go through the list to confirm which stores sell tobacco and which do not. It is a good idea to visit or call the listed addresses to confirm location and/or presence of the stores you want to include in the study. Not all stores will sell tobacco products, and it is useful and necessary to determine this prior to the start of the study.

Store lists may also be compiled using the Yellow Pages of your phone directory or Yahoo Yellow Pages. If you plan to survey a small community, you can develop a list of stores by driving around town.

---

## Select Your Sample of Stores

*Unless you are familiar with the EXCEL software program, we suggest that you obtain assistance from your Program Evaluator to develop your store sample.*

You need to determine the number of stores to survey: will you select a sample of stores or will you survey all the stores? To determine which, you need to know the total number of stores in the specific area of interest, such as a political jurisdiction, neighborhood, city, or county. Your sample size calculation will depend on two potential situations: 1) if you know the stores actually exist, or 2) if the list is partially inaccurate. The first situation is the “*Perfect List Scenario*” and the second situation is the “*Imperfect List Scenario*.”

### ▼ Perfect List Scenario

If your list is from a licensing program or known to be perfect, you can use this [Sample Size Spreadsheet](#) to determine your sample size.  $N$  is the number of stores on your list, and the *estimated total sample size* is the number of stores you need to sample. You may choose to include a few additional stores on your list because some may be closed or you may be unable to locate the other stores. Following is a method to determine a replacement store list.

### ▼ Imperfect List Scenario

If you use the CDHS/TCS list and you have not cleaned it as discussed earlier, then only about 55% of the stores can be expected to sell tobacco. For example, if you have 100 stores on your list, you probably will be able to find only 55 stores that sell tobacco products.

---

If the number of stores is small, you should try to verify if the store sells tobacco by calling or visiting. Then you would have a perfect list and you should use the method described in the *Perfect List Scenario*. If the number of stores is large, you can use the same Sample Size Spreadsheet.  $N$  is the number of stores on the imperfect list and the *estimated total sample size* is the number of stores that should be sampled. You should verify if the store sells tobacco products. Note that your final number of stores sampled will be approximately 55% of the number estimated.

### ▼ Randomly Select Using Microsoft Excel

Follow these steps to randomly select the stores for the sample in Microsoft Excel:

1. Add a column before any other column in the store list spreadsheet (each row will contain information for one store)
2. Name it “Random” by typing in cell A1 (see Sample Size Spreadsheet)
3. Type in the cell A2 “=rand()”
4. Copy and paste this function to the number of rows desired
5. Select this column, copy, and paste special, pasting only values
6. Highlight the entire worksheet
7. Go to the Data menu item and select Sort

In the first dropdown menu under “Sort by”:

8. Choose “Random” (ascending)
9. Click the “OK” button
10. Go down the list to the number of stores that were calculated above; use these stores for your sample

*Replacement Store List.* If you are using a perfect list, you can obtain replacement stores from the randomly selected list (described above) by just choosing the next store on the list.

*Comparison of Multiple Communities.* If you intend to compare communities, neighborhoods, or political jurisdictions, calculate multiple sample sizes and create multiple sample lists.

*Using an Imperfect List from a Source Other than CDHS/TCS.* If your list is not perfect but is different from the CDHS/TCS imperfect list, your sample size calculation does not fall into either of the Perfect List or Imperfect List scenarios described above. Contact your local program evaluator to determine the store sample size needed.

---

## How to Map the Stores

After you finalize your store list, identify store locations on a map to prepare for data collection. Though somewhat time consuming, the most common method is to use a paper map to plot the stores' locations. Cross streets can be determined by searching the addresses through online map services, like MapQuest at <http://www.mapquest.com> or Yahoo! at <http://maps.yahoo.com>.

*Allow sufficient time to develop a good store list and map the location of the stores.*

If your resources allow, mapping software, such as MapInfo or ArcView, will facilitate this process. These software programs are costly and fairly complex. If you use the above methodology your data will be in Microsoft Excel. If you use a software program to map the stores, prepare the list by first saving the file as a symbolic link in Excel (SYLK or ".slk"). Then follow the directions for importing into MapInfo or ArcView. Keep in mind that the output from these programs is not perfect and will need to be confirmed and amended, especially if you will be visiting the stores more than once.

Once you develop your maps, divide the study area by the number of teams (with 12 stores per team per day as a model). Keep in mind street directions, traffic patterns and proximity of stores to each other when assigning stores to each team. A team should consist of two data collectors, one responsible for data collection on the exterior of the store and one responsible for the interior. (They can alternate roles.)

If you are interested in documenting the amount of advertising in stores that are close to where youth congregate (e.g., schools, parks and playgrounds), note these places on the maps during creation or the teams can note them on the maps when they are in the field. See samples, [Store Observation List](#) and [Map](#).

If feasible, survey results by political jurisdiction are advised. To do this, two additional steps are required:

- Identify stores by political jurisdiction (e.g., county supervisor districts);
- Draw your sample from each jurisdiction.

*Note: Be sure you have a large enough sample to yield reliable results.*

We strongly urge you to work with your local program evaluator if you intend to produce results by political jurisdiction.

---

## ***The Survey Instrument***

A survey instrument has been prepared for you (see [STORE Advertising Survey](#)). The STORE survey has been designed to enable you to match your local results with the State survey; those results will be available in late June 2002. Local data are usually strengthened by comparisons to state or national surveys because it provides a context for your results. You will be able to say whether your community is doing better or worse than the state or country as a whole.

The survey instrument includes three optional areas for data collection:

- Store's proximity to places where youth gather (e.g., schools, parks and playgrounds)
- Store location by political jurisdiction
- Smokeless tobacco brands

If you are conducting a survey to assess the level of compliance with specific laws and ordinances, you may want to collect other information on the stores. Feel free to add questions at the end of the survey instrument and to add directions for the surveyors in the counting protocols.

---

## **Counting Protocols**

The accuracy of your survey results depends on the quality of the data collected by your surveyors. Documenting tobacco industry marketing materials in stores is a complex task. Counting protocols (or rules) have been developed for the survey. It is extremely important that all of your surveyors understand and follow the counting protocols. A training agenda is discussed below; for a copy of the protocols, see [Instructions for Surveyors](#).

---

## **Use of Photos**

There is truth to the adage that a picture speaks a thousand words. Photographs are a powerful way to convey the problem of tobacco advertising in stores. Photos breathe life into your survey results and are valuable when educating the community and policy makers about the issue of tobacco advertising in stores. If you take photos as part of your survey, take them after you have completed data collection in that store. A photo of the store exterior can be taken without permission; before taking photos inside the store, get permission from the store manager or clerk on duty. It is also a wise practice to avoid store identifiers in the photos if you are using them for educational purposes in the community. For photos of tobacco advertising see the Stanford Web site at <http://prevention.stanford.edu/retailer/index.htm>.

---

Digital cameras efficiently and economically capture images, which can be stored on a computer and later printed or used in multimedia presentations. These images provide compelling visual support for your findings. (Disposable cameras also work well.)

If you are considering purchasing a digital camera, here are minimum specifications to consider:

- A “megapixel” rating of 2.0 megapixels or higher
- Optical zoom 3x
- Removable memory cards of 32 megabytes (in case you fill the memory in one trip)
- Rechargeable batteries and a USB connection for downloading images are also useful features

Take several photographs of the same area or object at different angles and distances. Be careful of objects obstructing your view and reflections in windows and cases, especially when using a flash. Overcast daylight is ideal for photographing advertising placed inside store windows to avoid blind spots and reflections.

*Note: If you see a store that is really unusual in either the amount or type of advertising, email the name and location to Matthew Le Veque ([mleveque@rogersassoc.com](mailto:mleveque@rogersassoc.com)) at Rogers and Associates. He is interested in photographing stores of this nature.*

## **Recruit Surveyors**

---

### **Qualities to Look For**

Data collectors are the core of the survey’s success. Take the time to select the right people. Here are some ideal characteristics for ad survey data collectors:

- organized
- detail-oriented
- patient
- confident
- professional looking but not intimidating
- friendly but not timid

Have bilingual capabilities in Spanish or an Asian language where needed. Experience with interviewing is not required, but it can be helpful, especially if an owner or clerk needs to be coaxed. Keep in mind that the store environment has been the focus of much controversy and media attention. Data collectors must be sensitive to these issues while out in the field.

This is a time-consuming and sometimes draining survey, both physically and mentally. Though not common, some stores may require up

---

to 30 minutes to complete the survey. Thoroughness, patience, and a sharp eye are crucial qualities for data collectors. Depending on your resources, it may be good to test the applicants before hiring them; ask them to pick out advertising in a photograph of a store or in your office.

---

### Adult (Not Youth) Surveyors

Adults are better suited for this kind of data collection. Few teens have the attention to detail or the patience required for accurate data collection. Some situations will require tact and persuasive skills that may be easier for adults. In addition, stores in some neighborhoods may be too risky for youth to visit. Adults who understand the issue of tobacco advertising may be more likely to commit their time and resources to planning and implementing the survey, especially those who are already involved in drug, alcohol or tobacco prevention organizations.

*It is more complicated to conduct an accurate tobacco ad survey than a YPS. It is highly recommended that adults, not teens, conduct the ad surveys.*

---

### Volunteers Versus Paid Staff

Volunteers may have more “activist” interests than paid staff hired for this job. You may encounter time constraints and scheduling conflicts with volunteers. Still, it is good to involve as many members of the community as you can in data collection to help them become involved in the issue, while also educating them.

---

### Consider Adult Volunteers, Parents, Key Opinion Leaders

If possible, involve a wide range of community residents as data collectors. Adult volunteers, parents, and opinion leaders are more likely to feel ownership in their community as they learn first-hand about the problem. This involvement can fuel a passion to create change. It may be wise to include a local reporter in the process (if they agree to maintain confidentiality of the stores until or if you decide to release store-specific information). These volunteers frequently become supporters for any subsequent campaign to deal with the problem; involving opinion leaders in the process can help shape the proper political environment for change. It is important to encourage community involvement especially from people with a higher personal stake in the issue; it will ensure the success of the survey and they remain valuable resources once the data collection is completed.

---

## Conduct the Survey

### Train Your Surveyors

Proper training is the most important component in efficient and reliable data collection. It should include example photos of counting protocols, an opportunity to try the survey in the field and a test of the rater's abilities. Explain to the data collectors why this information is important, how the data will be used and the potential benefits that may result for the community. Train them how to interact with store employees or owners, how to complete the data collection forms, what to do if a problem arises, where to turn in the completed forms and the timeline for completion. Provide a manual/material kit they can use while in the field. The training should be held immediately before the teams go into the field so the information is fresh. See [Training Tips for Ad Survey](#) and [Store Ad Photos](#) to assist you with your training. For a more extensive collection of tobacco advertising photos, see the Stanford Web site at <http://prevention.stanford.edu/retailer/index.htm>.

As part of the training, visit a "friendly" store (perhaps one not in the study's sample) to practice collecting data on the survey forms. After visiting the store, meet with the data collectors and discuss any questions or problems they have with the survey form and counting protocols. This will help eliminate confusion and allow the surveys to be completed more efficiently.

It is important for the data collector to be aware of the store environment and stay out of the way of customers or employees. The natural flow of customers into the store may interrupt data collection, increasing the time spent in the store.

It helps to develop a working relationship with the store owners, especially if you plan to conduct on-going activities in the store, such as a voluntary reduction or removal of tobacco advertising. You can start by appealing to the store owner's "community" perspective (e.g., store owners are often the parents of school children and may be concerned about their own children's exposure to tobacco advertising). This will require further training for the data collectors, if they are to be involved in a merchant education component of an intervention.

---

### Prepare Materials

Each team should have the following materials as they venture out into the field for data collection:

- *Names, addresses (use as disposition sheet)*: List all stores, addresses, cross streets (if possible), phone numbers and a place to write comments. Use this form to track visits, notes for stores to return to or replace and general reference. See sample, [Store Observation List](#).

- 
- *Maps with store locations:* Along with the map with stores identified (see sample, [Map](#)), include a regular map of the area. These are available at local supermarkets or through the American Automobile Association (AAA).
  - *Survey forms pre-coded with store info:* Include a survey for each store in the sample, with a pre-coded label on the cover sheet. Have extra survey forms and pencils.

## *Summarize Results and Produce Report*

---

### **Analysis**

Be sure to involve your evaluator in the analyses of the data collected.

The first step in analyzing the results of your survey is entering the data into a database. If resources allow, you can have a professional keypunching service enter your survey data. If you choose to enter the data yourself, use the Excel spreadsheet provided. See [Local Data Entry Spreadsheet](#) and [Database Read Me](#) for assistance with your analysis.

It is standard practice to “double keypunch” (enter your data twice) the data to verify accuracy. This reduces the risk of error in your results. Please consult with your evaluator to determine the best way to verify your data.

*Involve your local  
program evaluator in  
the data analyses.*

The spreadsheet is organized into several separate worksheets. The first worksheet is for “StoreInfo” data, which is the data from Section A of the survey form. The next three worksheets contain the data from sections B, C, and D of the survey form (store exterior, store interior, and the optional language component). Be sure each worksheet has one row for each store (there will not be multiple rows for the same store on the same worksheet).

*Note: It is critical that you enter the correct store ID in each section. Also, enter a period (.) for any missing data in the survey.*

The last worksheet in the spreadsheet will calculate some basic analyses. This worksheet is linked to the data on the previous worksheets and will present basic summaries (e.g., means and frequencies). Your evaluator can perform further analyses, or if you choose, you can create your own formulas for analyses on this page. Use the existing formulas as examples.

---

## Report of Findings

Now you can develop a report of your findings. It is important to present your findings in a clear and interesting way so your community can easily understand the results. Also keep in mind another audience: the media. Make graphs and charts colorful and easy to read.

You can make them in a Word document, then copy and paste into your final report. Below are several possible types of data to consider; the final decisions will depend on what you found in your survey results. If your sample size is large enough so you feel confident that the findings are representative, you might compare the results by different store types and/or across political jurisdictions.

Also consider the following:

- number of stores in your study (by store type)
- total number of ads, functional items, age of sale signs, shelving units, and displays
- number of stores with ads at or below three feet
- number of stores with promotions

These types of data are included in the State survey (results available June 2003) and will enable you to compare your results to state level data.

You can use the [Report Template](#) to easily display your survey results.

[Back to DOCUMENT THE PROBLEM: Store Marketing](#)