



THE MARKETING OF ELECTRONIC CIGARETTES IN THE UK

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KEY FINDINGS, CONCLUSIONS AND IMPLICATIONS

Introduction

Tobacco harm reduction has long been a public private partnership (PPP), with all the potential conflicts of interest between the two sectors that such arrangements bring. Until recently, however, this was a relatively simple PPP, between tobacco control and one private partner: the pharmaceutical industry. Now a combination of technical innovation and an energised debate about harm reduction has opened the territory to two new private sector operators: electronic cigarette (e-cigarette)^a companies and tobacco companies, which has stimulated a dramatic increase in commercial activity. This study was commissioned to examine these developments, and map out both current activity and likely future trends. It covered the period from May 2012 to June 2013, and comprised a systematic audit of all forms of e-cigarette marketing, as well as the related public relations and editorial comment in tobacco industry and retail trade press. Traditional and digital / social networking outlets were included. In addition, in-depth interviews were conducted with marketing experts to help make sense of what was a very extensive data set: 991 discrete items (editorial, images, online posts and advertising) were identified.^b

Summary of key findings

- A plethora of small e-cigarette companies has emerged producing an enormous range of products and marketing them in every conceivable way. In just over one year, there were 121 product trademark applications and 12 emerged in the two weeks following the MHRA announcement.^c Four of these were made by the tobacco company, Imperial Tobacco; the remainder by independent e-cigarette/e-shisha companies.^d Sponsorship,^e celebrity endorsement, social networking, television advertising and a bewildering degree of product innovation are all being energetically deployed.
- The line between paid advertising and news reports is often hazy; some news features could pass for adverts and adverts for news. Even letters to newspapers from e-cigarette users and anecdotal cases in news reports about e-cigarette success stories read like press releases in some instances.
- The media itself is getting confused, as in the Telegraph headline following the MRHA announcement: 'Smokers urged to 'cut down' rather than quit' (N Collins, Daily Telegraph).¹
- There is a general underlying assumption that e-cigarettes are nicotine replacement therapy (NRT) products.

^aElectronic cigarettes are also referred to as electronic nicotine delivery systems (ENDS). We will refer to them as e-cigarettes in this report.

^bThis figure excludes postings on social networking platforms.

^cThese trademark applications were made between 1st May 2012 and 26th June 2013 (see section 2.1.1 for data searches).

^dSee Appendix 1.

^eSince our press audit was conducted, one football club announced it will rename its ground 'Cigg-e Stadium'.

BBC News (2013). Merthyr Town stadium named after E-cigarette. Available at: <http://www.bbc.co.uk/news/uk-wales-south-east-wales-23779140> Accessed on 23/08/2013.

- Distinct marketing strategies for two consumer groups emerged: the committed smoker who may be thinking about quitting; and the younger social smoker/ non-smoker. In addition there is extensive evidence of energetic stakeholder marketing.
- Two distinct sectors are also apparent: small independent e-cigarette companies and multi-national tobacco companies. The independents have been in the market for longer and are therefore more heavily involved in marketing. The findings for them are summarised first. The more recent interest of the tobacco companies is then discussed separately.

Marketing aimed at smokers

- E-cigarettes are presented by the independents as:
 - a healthier and safer source of nicotine than traditional cigarettes.
 - good for cutting down, quitting or switching from traditional cigarettes.
 - suitable for use in situations where the smokefree legislation applies; and without releasing harmful second-hand smoke.
 - tasting similar to tobacco, but cleaner and more fragrant.
 - cheaper than traditional cigarettes, backed by promotional pricing for starter kits to incentivise trials by committed smokers and pricing offers aimed at retailers to keep stock outlays to a minimum.
- Promotional pieces such as news-generating surveys, competitions, press releases, adverts and paid-for advertorials in the popular and trade press are common tactics.
- One brand sponsored a free public lecture on e-cigarettes (with refreshments) at a university to 'explain what they are, how they work, whether they help people stop smoking and whether they are safe' (Newham Recorder).²
- Television adverts for e-cigarettes also target the committed smoker who is considering quitting.
- Overall for this consumer group, e-cigarettes are positioned by the independent companies as a normalised necessity – the ultimate, socially acceptable, smoking alternative for someone addicted to nicotine.

Marketing aimed at the youth

- Independent e-cigarette companies present their products using a) cosmetic appeals (their attractiveness, coolness, colours and innovative packaging) and b) flavour variations across e-cigarette and e-shisha brands.
- Social media platforms display attractive price incentives and promotional discounts.
- Celebrities, their endorsements, and celebrity-inspired styling are common promotional tools in PR and advertising.
- Online promotions use contests, sales apps and group discount vouchers for e-cigarettes.
- Sponsorship for a range of sports is a prominent promotional strategy used by a number of independent e-cigarette companies.

- E-cigarettes are described as being for sale at exclusive events, popular venues, on company and group voucher websites, via social media platforms, specialist shops, concessions and e-lounges.
- For young non-smokers and social smokers, e-cigarettes are positioned as socially attractive and part of a rapidly growing trend.

Stakeholder marketing

- E-cigarette companies are targeting a number of stakeholder groups including regulators, politicians, health bodies, public health experts and charities.
- The products are described to these stakeholders as intended for tobacco harm reduction; e-cigarettes are, for example, presented as a boon for hardened smokers, offering potential for great public health gains.
- Promotional campaigns focus on aligning brands and business aims with those of stakeholders, especially with reference to product regulation.
- Care is also taken by independent e-cigarette companies to distance their products from tobacco.

Tobacco industry investment in e-cigarettes

- While the marketing of e-cigarette brands that are owned by tobacco companies is in its infancy in the UK, the tobacco industry has begun to take an active interest in this new generation of products, buying up some of the new operators and thinking strategically about how these developments might benefit its business.
- Stakeholder marketing by tobacco companies is much in evidence; products are described as being for harm reduction and the safe consumption of nicotine.
- Growth of the sector is seen as a long-term objective, illustrated by the creation of product-specific boardroom roles for senior executives. One company, for example, has appointed a head of 'Next Generation Products' (N Thomas, Daily Telegraph)³ and another is 'look[ing] at alternative ways of delivering nicotine beyond just e-cigarettes' (The Express).⁴
- Achieving legitimacy and aligning both public and private interests through the harm reduction debate are core aims.
- E-cigarette brands owned by tobacco companies are being promoted through celebrity endorsements and channels where traditional cigarette advertising is banned.⁵
- The tobacco company-owned products are differentiated from those of both the pharmaceutical industry (no fun) and independents (don't really understand smokers' needs).

Implications

The pace of change is frenetic and the result is akin to a gold rush: anarchic, unpredictable and with potentially vast profits to be made. There is a massive incentive for the new e-cigarette companies to get established, develop brand share and so attract a buy-out by one of the big tobacco companies. In the longer term, a whole new sector for 'lower risk' products may emerge.

Similar upheavals took place in the UK alcohol market of the early 1990s when alcopops burst on the scene in the form of an alcoholic lemonade called 'Two Dogs', and new companies sprang up producing all manner of novel products, many aimed at young people. When there was a weak regulatory response the multinationals moved in to take over what has now become a global and highly profitable new sector. Alcopops have become Flavoured Alcoholic Beverages, shots a normal part of a pub's repertoire and respectable marques such as Bacardi Breezer and Smirnoff Ice now dominate this predominantly youth market. The upheaval started by Two Dogs has been turned into a legitimate business run by blue chip companies. Meanwhile the small operators continue to flourish under a weak regulatory radar, marketing highly questionable products such as shots packaged in test tubes, alcoholic energy drinks and Jaffa cake vodka. The result has been a proliferation of alcohol containing products and an increase in alcohol consumption, especially by young people.

All the indications are that e-cigarettes will follow a similar trajectory and, assuming the new products deliver on their initial commercial promise, this market will, in all likelihood, soon be controlled by the big tobacco companies. Crucially from their perspective, the sector and those operating in it stand to gain legitimacy and long-term stable profits (which depends on recruiting new users). If the alcohol metaphor holds, the small operators will also continue to operate pushing the boundaries of acceptability. So the commercial partners in the PPP will be content. The question is, will the public health partner also be satisfied? Or, as with alcohol, will it be faced with an expanded market for an unhealthy product which has increased both overall consumption and appeal to the young? Furthermore, will the tobacco industry have been rehabilitated in the process?

These are challenging questions, and any answers have to be tentative. This analysis of the current marketing landscape suggests both opportunities and threats for tobacco control. Given the hazards of foretelling the future, it has also thrown up significant uncertainties.

Opportunities

- E-cigarettes are accepted as being much safer than their conventional equivalents, so if smokers can be encouraged to switch there is the potential for significant public health gain.
- Harm reduction has great commercial benefits which are being enthusiastically assessed and actively exploited:
 - For e-cigarette companies it provides legitimacy, a noble cause and lucrative profits.
 - For tobacco companies it provides legitimacy, opportunities for influence and a promising long-term business model.

These benefits do raise concerns and uncertainties, which are discussed below, but the first point to note is that in a commercial sense the PPP looks very promising.

^F See Figure 31: Philip Morris International's plans for future 'lower risk' products.

- E-cigarettes are benefitting from a vast amount of entrepreneurial skill – new products, additional features and ingenious innovations are continually appearing. This is being backed by an extensive understanding of customer needs – whether those of smokers or non-smokers. It is also supported by energetic and imaginative marketing.
- The tobacco industry's interest in the market will serve to professionalise and add power to this business effort.
- Because the tobacco industry is primarily interested in issues of reputation and legitimacy it will also clean up shoddy marketing practice (such as the current rash of unsubstantiated health and effectiveness claims discussed below). As an industry executive explains: 'science must come first. Scientific data is critical, including the recognition that a vast science base has accumulated for decades' (M Kessler, CEO Lorillard).⁶ By the same token there are tobacco industry concerns that e-cigarette companies may be over-stepping the mark: 'are e-cig manufacturers going to face the same public-relations debacle that occurred when smokers of light and ultralight cigarettes found that they were getting much more 'tar' than advertised? Are we going to have a revival of "Has there been a cover-up"?' (J Lauterbach, Industry Analyst).⁷ There are of course, also downsides to the tobacco industry involvement, which are discussed below.
- Consumers are being given more accurate information about nicotine, and specifically being told that the health problems of smoking are not caused by it, but by other chemicals. In theory, this should have the effect of increasing the acceptance and appeal of nicotine (or at least reducing its lack of appeal) and hence boost NRT options. However, as discussed below, it is uncertain whether cessation or NRT is likely to do well out of the e-cigarette revolution.

Uncertainties

- As with all PPPs, the private partners' motives are commercial not public, and this can result in conflicts of interest.
- E-cigarette companies are frequently disregarding the Advertising Standards Authority (ASA)⁹ advertising rules: unsubstantiated claims that their products are safer (or sometimes safe) and healthier, and offer an effective way to quit, are routine - as are supposedly outlawed 'smoke anywhere' messages.
- The e-cigarette companies use harm reduction when it suits, but drop it when other sales pitches work better. These alternatives often run directly against tobacco control interests, such as 'smoke anywhere' and dual use appeals which are likely to undermine smokefree ordinances.
- Market opportunities are being grabbed wherever and whenever they occur, regardless of any public health benefit – or indeed harm. The obvious example of this is the active targeting of young non-smokers.

⁹The ASA takes action against misleading, harmful or offensive advertisements across media in the UK.

- Legitimacy is a vitally important issue. Despite their questionable marketing practices, e-cigarette companies want to build legitimacy with policy makers; in particular most want to fend off regulation. Equally they want to enhance their standing with consumers so as to boost sales. Paradoxically they are getting the first sort of reinforcement from tobacco control via harm reduction, and the second from the tobacco industry who know the secrets of smoking and so can anoint (and for the lucky ones, buy out) promising alternatives.
- The tobacco industry has an even greater interest in gaining legitimacy, especially with policy makers. As a tobacco industry analyst notes 'another piece of new conceptual thinking is the idea of "legitimacy"' (D Hedley, Industry Analyst).⁸ He expands the point: 'Another word in the new vocabulary of tobacco products is legitimacy. This is epitomised in a UK example: while cigarettes are being progressively being [sic] locked away in cupboards and under counters so that they cannot be seen by children, Tesco, the UK's leading retailer, has special stalls explicitly promoting a brand of e-cigarette' (D Hedley, Industry Analyst).⁹ Lorillard's CEO puts the advantages bluntly, pointing out that his company's acquisition of Blu ecigs '...gives Lorillard a meaningful seat at the table in the harm reduction debate, and we intend to provide responsible leadership to this emerging category. Through improvements in technology e-cigarettes will continue to get better and better, and with Lorillard's regulatory expertise and sales infrastructure, we believe the category can reach its potential in a responsible manner' (M Kessler, CEO Lorillard).¹⁰
- In each case, harm reduction provides the key and features heavily in both the e-cigarette company marketing and tobacco industry strategic discussions. Tellingly this focus is much more apparent in marketing aimed at stakeholders than that aimed at consumers. A tobacco industry representative explains: 'business objectives and public health objectives can be aligned for the best outcome...if all involved recognise that harm reduction, as opposed to prohibition, can become a meaningful part of an overall health strategy designed to reduce tobacco related disease. Government and industry can work together as partners' (M Kessler, CEO Lorillard).¹¹ Similarly BAT welcomed the MHRA's^h decision to regulate e-cigarettes as this 'could play an important role in public health and tobacco harm reduction' (A Ralph, The Times).¹² The continuing existence of a legitimate market in tobacco, implicit in a harm reduction approach, is also approvingly noted: 'Public health experts have long considered harm reduction a legitimate approach to the reduction, but not the elimination, of threats to life and health caused by various behaviours. We know that tobacco products will continue to be legal for the foreseeable future. We know that not all tobacco products are identical or equally harmful, common sense tells us there is a clear continuum of risk. It is clear that a harm reduction policy will make greater strides than the discredited, all or nothing, abstinence only strategy' (M Kessler, CEO Lorillard).¹³

^h The Medicines and Healthcare Products Regulatory Agency (MHRA) is responsible for regulating all medicines and medical devices in the UK by ensuring they work and are acceptably safe.

- Consequently the pronouncements of NICE, ASH (London) and the MHRA are woven into e-cigarette marketing.ⁱ For example, one brand's Facebook page stated: 'NICE Recommends E-Cigarette for Smokers. NICE has become the first public institution to recommend the electronic cigarette for smokers who cannot quit' (Vapestick Facebook page),¹⁴ another company's Facebook page announced that the brand is 'proud to say the charity Action Smoking & Health [ASH (London)] have supported us in our partnership' (Nicolites Facebook page)¹⁵ [its sponsorship deal with Birmingham FC], and the 'Vegas Vapefest September 20-21, 2013 – Electronic Cigarette Seminar and Expo' quotes ASH (London)'s statement on a harm reduction approach to tobacco (National Vapers Club website).¹⁶
- Again policy makers are the crucial target. For example, one brand used a survey conducted by ASH (London) to petition against proposed changes in the European Commission Tobacco Products Directive (TPD). In a tweet linked to a blog post on 'the E-Cig Ban Threat & Why "Youth Health" Is A Red Herring', the company said: 'The concerns raised by some individuals, politicians and anti-smoking groups about electronic cigarettes have taken many different forms over the last few years since their introduction, with one argument being used in favour of the proposed EU 'ban' on the devices being related to use amongst children... but there's no suggestion across the board of significant usage amongst under 18s, as the group for Action on Smoking and Health revealed just weeks ago....ASH Survey Finds Under-18 E-Cig Use 'Extremely Rare'...' (Tweet linked to blog post on VIP website).¹⁷
- The tobacco industry recognises that the stakes are high. If it gets this right it will own both the problem and the solution. It is difficult to think of another market where such an advantageous position exists. Coke's current attempt to own obesity solutions has some similarities, but it has not got public health support and no one is suggesting there should be NHS prescriptions for Coke Zero. If it succeeds, the acquisition of such monopoly power would represent a remarkable turnaround for an industry long relegated to pariah status.
- It will also leave it free to implement its stated policy of using the e-cigarette to support its conventional tobacco business, especially in developing countries, while creating 'a valuable revenue stream in the developed world in future' (E Wall, Sunday Telegraph).¹⁸
- Nonetheless, as this business grows there are signs of separate structures emerging within some tobacco companies: 'boardroom role[s] for alternative smokes' have been created and senior executives have assumed new roles of head of 'Next Generation Products' (N Thomas, Daily Telegraph). These industry representatives will be expected to fight for market share and greater commercial success for e-cigarettes. This will help boost switching, but may also have negative consequences such as the development of a youth market in nicotine (see Threats).

ⁱ It is not clear from the audit whether or not the selective quoting and reporting of the organisations' statements have been done with the agreement of the respective organisations.

This raises a crucial strategic question for tobacco control: is a revitalised and rehabilitated tobacco industry a desirable outcome? More specifically, what are the implications for the World Health Organisation's Framework Convention on Tobacco Control (FCTC) Article 5.3?^j

- This dilemma is thrown into relief by mention in tobacco industry strategising of an organisation called the Cooperation Centre for Scientific Research Relative to Tobacco or CORESTA: '...there is a chance that Coresta can bring some weight to bear, especially in the case of the US Food and Drug Administration, which is reasonably open and knows good research when it sees it. Coresta especially through its recommended methods, has a voice that has to be heard at times' (G Gay, Industry Analyst)²⁰. CORESTA is the tobacco industry body, established in the 1960s, which, worked with ISO (the International Organization for Standardization) on the low tar debacle and ensured industry interests were well-served throughout (Bialous SA and Yach D, 2001).²¹
- As noted by a marketing expert in an interview, cessation presents a weak business model: 'if you have a product that helps people to stop smoking and so the pool of smokers out there gets smaller and smaller, then your market gets smaller and smaller...' (Marketing Expert). Following the pharmaceutical industry's lead, therefore, some e-cigarette marketing is focusing on long-term use, as a permanent alternative to tobacco, or for use when smoking is not allowed – or simply as a lifestyle choice. One e-cigarette brand, for example, is promoting dual use by selling a traditional and e-cigarette in one pack: the brand's 'smart plastic case' has been 'designed to fit snugly in the pocket, protect the e-cig, and even house one regular tobacco cigarette for those adult smokers who chose to dual between the two' (Convenience Store editorial)²². As the tobacco industry takes over the sector, it is likely that this perspective will be reinforced. Tobacco companies have noted that their 'core business is, and will remain in, tobacco...' (K Feddy, Manchester Evening News).²³ It is questionable whether cessation will get much of a boost from e-cigarettes, and there is the possibility that dual use may prolong the use of combustible tobacco.
- Notwithstanding the positive public relations for nicotine noted above, it also seems likely that e-cigarettes will do as much to disrupt as support the nicotine replacement therapy (NRT) market. New generation nicotine products are being differentiated from pharmaceutical NRTs and positioned as 'pure commercial products' rather than medicines. It has been noted in tobacco industry trade press that: 'Low risk and non-tobacco nicotine products which are pure commercial products, rather than NRT products to help smokers quit smoking, are clearly an idea whose time is coming at least as far as the industry is concerned, though the smoker is reserving judgement' (D Hedley, Industry Analyst).²⁴ Furthermore, they have the potential to compete very successfully because 'nothing on the [NRT] market meets the sensorial, emotional and physiological needs of smokers' (D Hedley, Industry Analyst).²⁵ The role of regulation in this, if any, remains to be seen.

^jFCTC Article 5.3 exists to protect 'public health policies with respect to tobacco control from commercial and other vested interests of the tobacco industry' in order 'to avoid the creation of any perception of a real or potential partnership or cooperation resulting from or on account of such interaction'.

World Health Organisation (WHO) (n.d). Guidelines for implementation of Article 5.3 of the WHO Framework Convention on Tobacco Control, [online] Available at: <http://www.who.int/fctc/guidelines/article_5_3.pdf> Accessed 13/8/2013.

^kNICE guidance on tobacco harm reduction notes that 'there is reason to believe that lifetime use of licensed nicotine-containing products will be considerably less harmful than smoking'.

National Institute for Health and Clinical Excellence Public Health Draft Guidance. (2012). Tobacco: harm-reduction approaches to smoking. Available at: <http://www.nice.org.uk/nicemedia/live/13018/61198/61198.pdf> Accessed on 1/8/2013.

Threats

- For the tobacco industry, e-cigarettes present a 'relatively low-cost' strategy, which avoids the 'litigation risk of the traditional cigarette business' (TS Donahue, Industry Analyst).²⁶ Commentaries in the tobacco industry trade press suggest it has little to lose and everything to gain: if e-cigarettes take off, it will control the market and maximise the returns; if they don't, it will simply revert to business as usual. Tobacco control, by contrast, has much to lose: the clear 'no to smoking' message, numerous policy gains including Article 5.3, reputation and unity of purpose. In venturing down this path, therefore, it has a much greater need for e-cigarettes to work. This asymmetry makes a precarious platform for a public-private partnership; in any relationship a disproportionate need by one party to see the liaison succeed can result in danger signs being down played or ignored.
- Healthy alternatives have a symbiotic relationship with their 'parent' product. First of all, they tend to imitate it as closely as possible: just as decaf looks, smells and tastes like full strength coffee and Coke Zero aspires to be indistinguishable from red Coke. Similarly, there is evidence of e-cigarettes being designed to look and feel like a conventional cigarette. The simulated filters, smoke-like vapour emissions, glowing tips and tobacco flavourings capture the allure of the original, and, because imitation is the sincerest form of flattery, could have the effect of bolstering it.^l

Healthy variants also need the parent product to be legitimate: decaf depends on the norm of coffee consumption and diet Coke on habitual soda drinking. As one marketing expert noted: 'the market for e-cigarettes is defined or shaped by the existence of smoking'. This suggests that any added health value is necessarily built on the core benefits of the parent product. Just as Coke Zero has all the taste of Coke, and decaf the kick of full strength, so, even as they decry tobacco harm, e-cigarette adverts also promote the chance to 'take your freedom back' (Blue e-cigs website),²⁷ the legitimacy of 'seeking a nicotine kick' (K Feddy, Manchester Evening News)²⁸ and the right to 'enjoy them safely, anywhere you want' (K Feddy, Manchester Evening News).²⁹ In this way, alternatives may ultimately reinforce rather than replace the parent product.^m

- This reinforcement also takes the form of modelling. It could be argued that the public use of e-cigarettes is not modelling smoking, it is modelling not smoking. Technically this has some validity, but it is evident from the dataset that this does not stand up to real-world scrutiny. As e-cigarette use looks like conventional smoking, authorities have started to ban it in public places to avoid enforcement staff getting confused.ⁿ If a trained professional is unable to distinguish vaping from smoking, a child is unlikely to be able to do so. Given the e-cigarette makers' desire to imitate the 'real thing', the line between vaping and smoking is likely to remain unclear. Even when the behaviour is unequivocally vaping, it still models the idea of nicotine self-medication by inhaling a vapour into the lungs, along with the implication that there is another more dangerous way of doing this.

^l See section 4.1.1 (iv) smell, taste and cleanliness.

^m Since our press audit was conducted, a US media report has compared the actor in an American television advertisement for BluCigs to the 'Marlboro Man': 'Retro attraction: Blade actor Stephen Dorff also stars in ecig advertisements, resembling the classic black-and-white Marlboro Man ads from the 1950s'. Malm, S. (2013) Are celebrities making smoking cool again? How stars have boosted the sale of e-cigarettes, Daily Mail. Available at: <http://www.ablx.com/national/11067-are-celebrities-making-smoking-cool-again-how-stars-have-boosted-the-sale-of-e-cigarettes.html#sthash.mRDe1aVS.dpuf> Accessed on 10/8/2013

- This modelling is made more powerful through the media portrayal of vaping as with 'POP babes Girls Aloud' ... 'puffing on e-cigarettes to cope with the stress of their 10th anniversary tour' (C Moodie et al, Daily Mirror),³⁰ and Katherine Heigl vaping on the Late Show With David Letterman (ecigsavings.com website).³¹ The marketing power of these images is demonstrated by the fact that celebrity endorsements have become a core promotional tool for e-cigarettes, as they once were for conventional ones.^o
- Nicotine, as noted above, is being given a make-over. Whilst this has the benefit of correcting misapprehensions about smoking harm, it also runs risks. First it reinforces the hand to mouth/ inhalation habit, which is such a key part of conventional smoking. Second it promotes an addictive drug.^p It is the dependence inducing characteristics of nicotine – akin to those of heroin – that underpin the development of harm reduction. Third, whilst inhaling nicotine is much less dangerous than inhaling tar and carbon monoxide, it is not entirely harmless – and experience shows that the full risks of a product can take decades to emerge.^q At present, however, some e-cigarettes are being promoted as harmless and free from toxins, chemicals and carcinogens.^f

Marketers, especially in tobacco companies, are well aware of the opportunities addiction offers: it builds-in loyalty and explains the enormous profitability of tobacco companies themselves. Hence, the e-cigarette usage is being promoted 'as a safer and much cheaper method to satisfy a nicotine addiction' (P Ogden, Manchester Evening News)³² and reports about a sub-culture of 'vapers', 'who have no intention of quitting but instead believe their addiction can save millions of lives' are being posted on companies' social networking sites (Nicolites Facebook page).³³ The commercial pressures to promote long-term consumption and encourage recreational use have already been noted. The demographics of the smoking epidemic also suggest that any trade in nicotine will be skewed towards the poor and vulnerable and so, whatever the physical health consequences, it will maintain its deeply regressive effects.

- The long-term success of any market is dependent on recruiting new generations of consumers. In the case of tobacco, these beginners are typically children – few adults take up smoking^s – and the tobacco industry's dependence on selling to the young has become notorious. Similar concerns are apparent for e-cigarettes, with the production of variants such as e-shisha and flavoured and coloured offerings (with or without nicotine). These products are being marketed in ways very reminiscent of early tobacco advertising: as a lifestyle choice and statement of identity, backed up by association with celebrity, cool venues and fashionable events and the use of stylish design.^t The obvious appeal to young people (see Box 1) is also notable, and marketing experts said that they see the target as young (as low as 12 years old), impressionable and new to smoking.^u The creation of this market provides no public health gain and the fact that some of these products contain nicotine (and one is nicotine-free, but contains taurine) raises particular concerns.

ⁿ See section 4.1.1 (iii) smokefree legislation, beating the ban and second-hand smoke.

^o See section 4.2.3 (i) celebrities.

^p While licensed nicotine containing products (NCPs) deliver nicotine more slowly than cigarettes and are therefore probably less addictive, e-cigarettes are currently unlicensed and there is insufficient data to determine whether this is the case with these new products. The need to assess the addictive potential of NCPs was raised in a report prepared by the German Cancer Research Center.

German Cancer Research Center (Ed.) Electronic Cigarettes – An Overview. Heidelberg, 2013. Accessed 15/5/2013. Available at: http://www.dkfz.de/de/tabakkontrolle/download/Publikationen/RoteReihe/Band_19_e-cigarettes_an_overview.pdf Accessed on 30/05/2013

^q Potential health effects were also presented in the German Cancer Research Center report.

^r See section 4.1.1 (i) healthier alternative and a 'safer' product.

^s The 2012 Surgeon General's report on youth prevention suggested as many as 88% of smokers start before the age of 18.

^t See section 4.2.1 product, 4.2.3 promotion and 4.2.4 positioning.

^u See section 4.2 marketing strategy aimed at young social smokers or non-smokers.



Conclusion

E-cigarettes have stimulated a great deal of commercial activity: many new companies have sprung up in search of massive potential profits and the tobacco industry is positioning itself to take over the sector as this early promise turns into a long term business opportunity. On the one hand this presents a great chance to reduce harm: if large numbers of smokers make a complete switch from tobacco to the much cleaner e-cigarettes many lives could be saved.

On the other hand many uncertainties and threats are apparent. The National Institute for Health and Care Excellence (NICE) guidance on harm reduction, which covers licensed nicotine containing products rather than currently unlicensed e-cigarettes, has been loosely interpreted and resulted in the product being 'declared safe to use' (Evening Standard)³⁴ with the support of public health experts – even though concerns over safety remain. Furthermore, the MHRA ruling, which will ultimately introduce a degree of regulation, has been synchronised with the European Commission Tobacco Products (TPD), thereby giving commercial interests a free hand until at least 2016.^v It is clear that companies are taking full advantage of this lacuna.

From a public health perspective this is throwing up some worrying indicators:

- what marketing rules there are (those from the ASA) are being repeatedly breached;
- hard-won tobacco control policies (smokefree public places, the adban, age restricted sales, tobacco industry denormalisation, POS restrictions) are being undermined;
- there is evidence that young people, who have always been the key to the long-term viability of the tobacco industry, may be being pulled in to the market;
- commercial lobbying opportunities are being created and exploited;
- nicotine is being boosted but cessation and NRT messages are being overshadowed;
- the unambiguous 'say no to smoking ' message is at risk of disappearing.

Beyond these specific concerns, the whole strategic direction of tobacco control risks becoming muddled. The recent focus on an endgame for tobacco sits uncomfortably with this marketing-energised move to harm reduction. This need not necessarily be so; in the illicit drugs field harm reduction has come to be seen, not as an end in itself, but a stage on the journey to recovery – to being drug free. The same could be true for tobacco. However, the commercial interests now involved in harm reduction are unlikely to be interested in this longer term vision, because recovery for the population means lost profits for them. This is the ultimate catch 22 of all public private partnerships – for commercial partners profits will, in the end, always take precedence unless measures are put in place to ensure that other outcomes are prioritised.

Nor is this just a domestic concern. These developments also have international ramifications. In particular, if actions in the UK result in the tobacco industry regaining respectability the implications for FCTC and global tobacco control would be serious.

Regulation has a major role to play in reducing these threats. New product developments, industry manoeuvrings, marketing and the protection of the young and vulnerable can all be addressed with carefully implemented public policy. Indeed such regulation has been a principal function of tobacco control over the last three decades and delivered much of the progress which has been made. The MRHA ruling itself recognises this need for regulation. However, the three year delay in implementation means it will come too late to stop many of the problems becoming entrenched. There is then an urgent need for swift and comprehensive regulation of the e-cigarette market.

^v The recent vote in the European Parliament means that it is no longer clear that TPD will bring e-cigarettes under medicinal regulation, and so also has raised some uncertainty about the MHRA licensing plans announced in June 2013.

Specifically:

- Much tighter regulation of e-cigarette marketing is needed.
- E-cigarette use should be restricted to reduce the danger of modelling – for example it should not be allowed in places where children are present.
- Regulations should also be used to incentivise cessation rather than recreational use.
- The terms and spirit of FCTC Article 5.3 should be strictly adhered to and policy formulation carefully distanced from tobacco industry influence. The likely licensing later this year of a new generation NCP produced by a tobacco industry subsidiary marks up both the difficulty and urgency of this task.
- Measures should be considered urgently to reduce the affordability, accessibility and attractiveness of conventional tobacco products.

These steps align with longstanding tobacco control policy. At the behest of the UK tobacco control community, the Health Select Committee inquiry in 2000 argued that a 'Tobacco Regulatory Authority should be introduced', which would be 'completely independent of the tobacco companies' and 'look at all aspects of the marketing of tobacco, the product itself and the nature of its health risks and developments in respect of 'safer' cigarettes' (House of Commons Committee on Health).³⁵ The same idea was endorsed at an EU level by the ASPECT consortium four years later: 'capacity to assess and regulate nicotine and tobacco products in the Commission and Member States needs to be greatly increased' either 'by an extension of existing capacity within the European Commission and/or the establishment of a European tobacco and nicotine products regulatory agency'...'The remit of such an agency would include all aspects of tobacco and nicotine product design and marketing, as well as risk analysis and risk assessment' (The ASPECT Consortium, 2004).³⁶

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1 Introduction

In June 2013, the UK's health regulator, the MHRA, announced that e-cigarettes should be licensed as medicines when the European Commission's revised Tobacco Products Directive (TPD) is adopted. This is expected to come into effect in 2016 when the marketing of these products to children and non-smokers will subsequently be monitored (MHRA, 2013).³⁷

The MHRA is currently encouraging e-cigarette manufacturers with unlicensed products on the market to apply for medicine licences, but until that law is in place (MHRA, 2013),³⁸ e-cigarettes will continue to be regulated under the General Products Safety Directive (GPSD), which enforces general safety requirements and is monitored by local authority regulatory officers particularly through Trading Standards (Cancer Research UK, 2013).³⁹ During the MHRA consultation on whether e-cigarettes should be licensed as medicines, the Trading Standards Institute raised concerns that the consumer product can currently be advertised and promoted 'to anyone, in any location and by any means' and legally sold to young people of any age (MHRA, 2010).⁴⁰

The need to monitor e-cigarette marketing as well as direct, indirect and incidental media reporting and promotion of nicotine containing products (NCPs) has also been highlighted as a priority in a tobacco harm reduction research agenda commissioned by Cancer Research UK (CRUK, 2013);⁴¹ a recent study on newspaper representations of e-cigarettes in the UK and Scotland (Rooke C and Amos A, 2013);⁴² an on-going study in the US on e-cigarette website marketing (Grana R, 2013);⁴³ research on the awareness, perceptions and use of e-cigarettes among American adolescents and young adults (Choi K and Forster J, 2013; Cho JH et al, 2011);^{44 45} and in NICE's guidance on tobacco harm reduction, which noted that 'electronic cigarettes and similar products could, without regulation, be marketed in a way that may ultimately promote smoking' (NICE, 2013).⁴⁶

The need to monitor e-cigarette marketing is made greater by the fact that tobacco companies are increasingly taking ownership of the e-cigarette market (Hastings G et al, 2012)⁴⁷ and 'have the professional marketing savvy and the financial clout' to promote the product as widely as possible in order to appeal to new consumers and maximise profits (D Hedley, Industry Analyst).⁴⁸ The tobacco industry has a well-established interest in young people entering the market – the latest report on youth smoking from the Surgeon General (2012),⁴⁹ for instance, estimates that 88% of smokers start in childhood (Surgeon General, 2012). It is therefore a public health priority to understand how e-cigarettes are being marketed. The aim of this report is therefore to highlight the very real risks of the current situation and to propose ways to mitigate these, taking into account the strong support from many in tobacco control for a product that also has the potential for significant public health gains. The challenge will be to maximise the latter while minimising the risks.

^wThe recent vote in the European Parliament means that it is no longer clear that TPD will bring e-cigarettes under medicinal regulation, and so also has raised some uncertainty about the MHRA licensing plans announced in June 2013.

2 Research objectives and methodology

In the UK, there are an estimated 1.3 million current e-cigarette users and, although rigorous studies proving safety and efficacy are currently lacking, public health advocates have generally recognised the potential for e-cigarettes to help smokers cut down or quit and believe 'there is increasing evidence to suggest that some if not all products provide effective nicotine delivery' (ASH, 2013).⁵⁰

E-cigarettes are now also available in disposable versions called e-shisha or shisha pens, which come in a range of flavours and may be nicotine-free (E-shisha sticks website).⁵¹ While a recent survey suggests that there is currently little evidence that e-cigarettes are being used by those who have never smoked or by children in the UK (ASH, 2013),⁵² anecdotal media reports suggest that 'current e-cigarette marketing tactics...revive the old glamorous promotional cues which for decades have attracted young people to the deadly habit of cigarette smoking' (J Lane, Huffington Post; M (Felberbaum, ReviewJournal.com; L Buckland, The Scotsman).^{53 54 55}

This study systematically captures these 'promotional cues' and uses them to map out marketing strategies used by independent e-cigarette companies and those owned by tobacco companies. The research is particularly pertinent as it traces marketing efforts surrounding two key milestones for tobacco harm reduction in the UK: NICE's published guidance on Tobacco: harm-reduction approaches to smoking (NICE, 2013)⁵⁶ and the MHRA's decision to regulate e-cigarettes as medicines.

Following NICE's guidance on tobacco harm reduction, the UK was the first country in the world to recommend licensed NCPs to those who have no intention of quitting, but would like to reduce the number of cigarettes they smoke. While e-cigarettes in the UK are currently unlicensed and 'little direct evidence is available on the effectiveness, quality and safety of nicotine containing products that are not regulated by the MHRA', the guidance states that 'they are expected to be less harmful than tobacco' (NICE, 2013).⁵⁷

The extent to which the latter statement and the MHRA's announcement on e-cigarettes has been documented in the media, retail and tobacco industry trade press, and subsumed in e-cigarette companies' marketing practices, is examined in this report.

This report details the current marketing of e-cigarettes in the UK following a systematic study, which analysed discursive strategies in traditional, electronic and social media and on television to determine:

- how e-cigarettes and innovations such as e-shisha are being **directly marketed** in the press, retail trade press, tobacco industry trade press, through television clips and other traditional communication channels and sources; and
- how e-cigarettes and innovations such as e-shisha are being **indirectly promoted** in the press, retail trade press, tobacco industry trade press, through television clips and other traditional communication channels and sources.

Results are presented from a business and marketing perspective: study findings are presented as consumer and stakeholder marketing strategies designed by independent e-cigarette companies and those owned by tobacco companies.

The main methods and means of data collection were:

- a thematic content analysis of traditional media reports; press releases; web publications; trade press publications; magazines; periodicals; and tobacco industry journal publications;
- a social media analysis using netnography to identify, observe and analyse on-line communications of e-cigarette companies and their users on various social media platforms; and
- qualitative, semi-structured interviews (n=5) with professional marketing and communications experts.

2.1 Traditional print media content media analysis

A range of UK traditional print media, including newspapers, journals, magazines, periodicals and press releases, were searched for any references to electronic cigarettes (and electronic shisha). All the source content was searched: editorial text, advertising and images.

2.1.1 Data searches

i) Date range

The MHRA announced that the government will regulate e-cigarettes as medicines on Wednesday, 12th June 2013 (MHRA, 2013).⁵⁸ In anticipation of the announcement, the searches of traditional print media covered the previous year (1st May 2012 – 28th May 2013) with separate searches conducted two weeks prior to the MHRA's announcement (29th May – 11th June 2013) and two weeks following the announcement (12th June – 26th June 2013). This dataset overlaps by 2 months with a recent analysis of how e-cigarettes were framed in the UK and Scottish press up until the end of June 2012 (Rooke C and Amos A, 2013).⁵⁹

ii) Sources

A range of traditional print media types were selected: UK newspapers (broadsheets, tabloids, local press and freesheets) and weekly magazines; UK tobacco retailers' trade press (industry periodicals produced for the types of retailers that sell cigarettes and tobacco, e.g. supermarkets, garage forecourts and convenience stores); the tobacco industry trade press; and company press releases and newswires.

The traditional print media types were searched in some cases in a couple of formats, as electronic text-only documents (via the Nexis® UK Publications database) and via hard copies of the newspapers, magazines and periodicals. The Nexis® UK Publications database contains all sources carried by LexisNexis that are published in the United Kingdom and lists 1,015 sources in its information (<http://www.lexisnexis.co.uk/en-uk/products/nexis.page>). It identifies only articles and editorial content however, and not advertisements or images. The hardcopies have all the images, photos and adverts but are more time-consuming to search by hand. The range of traditional print media types searched is described below and the sources and dates are summarised in Figure 1.

- **UK newspapers and magazines:** Two resources were used, an electronic subscription database of text-only content of all the UK's national and local newspapers (Nexis® UK Publications) and the National Readership Survey (NRS), the latter to identify sources for the 2 weeks pre- and 2 weeks post-MHRA announcement searches only. The most recent National Readership Survey (NRS) data for newspapers, general magazines and women's magazines for the previous year (January - December 2012) were used to select hardcopies of the two most popular UK broadsheets and tabloids with all adults (aged 15+ years) and the most popular women's weekly magazine with all adults (aged 15+ years) and with younger readers (aged 15-34 years) (NRS, 2013). A UK freesheet, published Monday to Friday, was also selected. (Hardcopies of newspapers were all the Scottish editions).
- **UK tobacco retailers' trade press:** Three resources were used, an electronic subscription database of text-only content for a selection of the UK's magazines and trade and industry journals (Nexis® UK Publications), an online independent retailer magazine and, for the 2 weeks pre- and 2 weeks post-MHRA announcement searches only, hardcopies of four retail trade press titles covering the types of stores selling cigarettes and tobacco in the UK, including grocery stores/supermarkets, convenience stores, garage forecourts and off-licences.
- **Tobacco industry trade press:** Hardcopies of two international trade publications "for executives in the world of tobacco" were selected.
- **Other resources:** The Nexis® UK Publications electronic subscription database also includes UK newswires and press releases, web-based publications and other content that was searched at the same time.

iii) Search strategy

Both electronic resources and 'hardcopy' (i.e. paper copy) sources were searched systematically. The electronic source (Nexis® UK Publications) was searched using the following search strategy for the three date ranges described above:

ecig! OR efag! OR eshish! OR e-hookah! OR e-cig! OR e-fag! OR e-shish! OR ehookah! OR (cig! w/4 (electr! OR battery OR recharge! OR cartridge)) OR (fag! w/4 (electr! OR battery OR recharge! OR cartridge)) OR (shish! w/4 (electr! OR battery OR recharge! OR cartridge)) OR (hookah! w/4 (electr! OR battery OR recharge! OR cartridge)) OR (vap! w/s (cig! OR fag! OR tobacco! OR nicot! OR smok!))

Key: ! – truncation, finds all the words made by adding letters to the end of it; w/4 – within 4 words of; w/s – within the same sentence as.

A simplified version of the search strategy was used for the online independent retailers' magazine. Hardcopies of newspapers, magazines and periodicals were hand-searched and read cover to cover for any references to electronic cigarettes and electronic shisha by a researcher.

Figure 1: Traditional Print Media Sources

Traditional print media sources searched systematically

Shading indicates the months searched

	May '12	Jun '12	Jul '12	Aug '12	Sep '12	Oct '12	Nov '12	Dec '12	Jan '13	Feb '13	Mar '13	Apr '13	May '13	Jun '13
Nexis® UK Publications (e-database)														
- Newspapers	[Shaded]													
- Magazines, Journals & Trade Press	[Shaded]													
- Newswires & Press Releases	[Shaded]													
- Web-based Publications*													29 May - 26 Jun	
- Other	[Shaded]													
UK Daily Newspapers (hardcopies)														
- Broadsheets (daily, top two for 'all adults't): The Daily Telegraph, The Times													29 May - 26 Jun	
- Tabloids (daily, top two for 'all adults't): The Sun, Daily Mail													29 May - 26 Jun	
UK Fresheet Newspaper (hardcopies)														
- One, Monday-Friday (excl. Bank Hols): The Metro													29 May - 26 Jun	
UK Women's Weekly Magazines (hardcopies)														
- Top one for 'all adults't: Take A Break													29 May - 26 Jun	
- Top one for '15-34 year-olds't: OK!													29 May - 26 Jun	
Tobacco Industry Periodicals (hardcopies)														
- Tobacco Reporter (monthly)	[Shaded]													
- Tobacco Journal International (bimonthly)	[Shaded]													
Tobacco Retailers' Trade Press (hardcopies x 4, website x 1)														
- The Grocer (weekly)													29 May - 26 Jun	
- Convenience Store (fortnightly)													29 May - 26 Jun	
- Off Licence News (fortnightly)													29 May - 26 Jun	
- Forecourt Trader (monthly)													29 May - 26 Jun	
- www.TalkingRetail.com	[Shaded]													

Notes: *Web-based Publications identified in the Nexis® UK Publications database contained multiple duplicates of newspaper articles. To keep the numbers manageable, the web-based publications were coded only for the 'two weeks pre-' and 'two weeks post-announcement' time periods. †From the National Readership Survey January – December 2012 (NRS, 2013).

iv) Results

A total of 991 discrete items (editorial text, images or adverts) were identified relating to electronic cigarettes or electronic shisha from the 'past year' and 'two weeks pre-' and 'two weeks post-announcement' searches and uploaded into the qualitative data analysis software database NVivo 10. Duplicate items were deleted between categories, for example a relevant newspaper article that was identified in both the electronic database and the hardcopy of the newspaper was only counted once. However, an online article in the web-based publications category was counted separately to the hardcopy of a newspaper article with the same or similar text. Three hardcopies of a total of 137 newspapers for the 'two weeks pre-' and 'two weeks post-announcement' searches were undelivered or unavailable (The Daily Telegraph, 3rd June 2013; The Metro, 14th June 2013; and The Times, 20th June 2013), however their text was still searched via Nexis® UK Publications.

The 991 items identified from all the sources and dates listed in Figure 1 were separated into two datasets, one for tobacco industry e-cigarette companies and one for independent e-cigarette companies, defined below and referred to in this report from now on as the Industry and Independent dataset respectively^x

- **'Industry' dataset:** A search of all the items was made for mentions of tobacco industry companies (from manufactures to related suppliers), known subsidiaries, and known tobacco company-owned electronic cigarette brands in the dataset. Where companies were purchased within the study time-period, they were counted as 'independent' for items published before purchase by a tobacco company and 'industry' after the purchase date. A total of **121 items** are included in the 'industry' dataset.
- **'Independent' dataset:** All the items that were not coded as 'Industry' were included in the 'Independent' dataset. In addition, 22 items that mentioned both a tobacco industry company and e-cigarette brand plus an independent e-cigarette company or brand. These 22 items are included in both datasets. Thus, a total of **892 items** are included in the 'independent' dataset.

References to e-cigarette television advertisements were captured in the press audit and these television adverts were subsequently sourced via YouTube.com, then viewed and thematically coded for analysis.

v) Coding and thematic analysis

A thematic analysis was conducted using an iterative process whereby codes were generated by reading and re-reading articles in the dataset until patterns started to emerge and codes could be clearly defined. A broad-based coding strategy was initially used (see Figure 2) until key thematic codes emerged, which could be analysed under the four variables (the 4 Ps) – Product, Price, Promotion and Place – of the marketing mix (Hastings G, 2007).⁶⁰ Thematic Analysis was conducted using the qualitative data analysis package Nvivo 10.

^xIt should be noted that this is a relatively basic split of the overall dataset. It refers to everything that is 'non-industry' as 'independent', however some of the 'independent' items may have come from a tobacco industry source although they do not refer to any named tobacco industry companies, subsidiaries or tobacco company-owned e-cigarette brands.

^yIncluding: Altria, BAT, Bespak, blu, British American Tobacco, CN Creative, Consort Medical, Fontem., Imperial Tobacco, Intellegig, Intellicig, Japan Tobacco, JTI, Lorillard, Nicadex, Nicoventures, Oxette, Pharmaserve, Philip Morris, PMI, Reynolds.

Figure 2: Definitions of broad codes evident in the dataset

Thematic Code Definition

Advertising	What is or appears to be a paid announcement for e-cigarettes in print, broadcast or electronic media and/or makes reference to these adverts (eg. reference to poster, television commercial, stalls, point of display etc.) and/or when an e-cigarette is offered as a prize and/or free sample.
Brand awareness	Any mention of a specific brand of e-cigarette rather than generally referring to e-cigarettes.
Brand sharing	References to specific e-cigarette brands linking up with other brands.
Breach	References to breaches in e-cigarette advertising/promotional rules.
Calendar events	When e-cigarettes are linked to calendar events such as No Smoking Day, Stoptober, Christmas, New Year etc.
Celebrity	When any celebrity mentions an e-cigarette in an interview and/or is pictured with an e-cigarette and/or an interviewee/publication mentions the celebrity's use of an e-cigarette.
Children or youth	Any reference to children or youth in the context of e-cigarettes.
Conducting studies and/or links to academics/universities	A study/survey conducted or sponsored by an e-cigarette company and/or mentions of e-cigarette brands linked to academic/universities.
Cosmetic appeal	References to the e-cigarette's improved physical appearance and/or cosmetic/aesthetic appeal.
Cutting down, quitting or switching	Any reference to e-cigarettes as cessation or harm reduction aids and/or switching from traditional cigarettes to e-cigarettes.
Environment	References to e-cigarettes in the context of the environment (i.e. as environmentally friendly products and/or claims about recycling etc.).
E-shisha	Any mention of the disposable e-cigarette known as e-shisha.
Flavours	References to the various flavoured e-cigarettes/e-shisha available.
Gateway	References to e-cigarettes being used as a gateway to smoking (ie. as a product that will lead the consumer to using traditional cigarettes).
In order to test the application of the iterative thematic coding scheme formulated by the lead	

Healthier alternative	Refers to e-cigarettes as healthier alternatives to smoking and/or less harmful products. May make specific references to having no tar or other chemical compounds.
Industry developments	Any references to e-cigarette and/or tobacco industry developments in the context of e-cigarettes and/or harm reduction.
Pack and/or accessories	Specific references to e-cigarette packaging and/or accessories. May included references to starter packs, refills, batteries etc.
Politicians	When politician(s) are mentioned in a publication referring to e-cigarettes and/or politician(s) make reference to e-cigarettes.
Price	Any mention of e-cigarette pricing (i.e. promotion as a cheap product). May also include price comparisons (i.e. cheaper than tobacco or nicotine replacement therapies).
Pro-regulation	Any mentions from e-cigarette companies and/or other parties that the products should be regulated and/or expressing a desire to regulate e-cigarettes as pharmaceutical products.
Regulation in other countries	Specific references to how other countries have regulated e-cigarettes.
Safety and quality	References to how safe e-cigarettes are to use and/or comments on technical quality of e-cigarettes (i.e. leakages, durability, fire safety etc).
Second-hand smoke	Specific references to e-cigarettes not exposing others to second-hand smoke and/or emitting harmless vapours.
Self-regulation	Any mentions from e-cigarette companies and/or other parties that the products do not need to be regulated and/or are already sufficiently regulated and/or should be self-regulated.
Smell, taste and cleanliness	References to the 'cleanliness' of e-cigarettes (i.e. no ash, no cigarette butts) and/or references to e-cigarettes having no smell and/or improved taste when using e-cigarettes.
Smokefree legislation and	References to e-cigarettes being used in smokefree areas beating the ban deliberately (i.e. to beat the ban) and/or e-cigarettes causing confusion and/or concern when used in smokefree areas.
Social acceptance	Any reference to e-cigarettes/e-cigarette use as a socially acceptable behaviour, which is accepted as the norm and/or e-cigarettes are depicted as familiar products (i.e. product knowledge is assumed and no definition is provided).
Sponsorship	Mentions of e-cigarette companies sponsoring events (i.e. sports teams, charities, public health events etc.).

In order to test the application of the iterative thematic coding scheme formulated by the lead researcher (as described above), a second researcher ran a series of searches within the full dataset of 991 items using key terms relevant to the study's key emergent themes (listed in Figure 3). Within the electronic databases, searches for terms related to the themes were run and any items identified this way were checked for relevance to the theme. Hard-copies of items that could not be electronically searched were read by a researcher to identify themes. Results were compared between the two researchers to examine inter-rater coding consistency. The majority of final totals per theme were similar between the researchers. Where differences occurred, the results were examined in detail and discrepancies resolved. The differences were not unexpected given one coding strategy was initially broad-based and the other used precise search terms. Final totals per theme were agreed between the two researchers; summed within each theme; and the prevalence of key themes calculated as the proportion of the total number of publications in the 'independent' and 'industry' datasets (see Figure 3).

Articles or advertisements relating to e-cigarettes (or e-shisha) varied in length from a few sentences to multiple pages and a single publication could have several themes. Prevalence is therefore merely indicative of emergent key themes and is not the only measure of a theme's significance.

Figure 3: Prevalence of some key themes, as a proportion of the total number of publications in the 'Independent' and 'Industry' datasets

Theme	Independent publications	% of total independent dataset (n=892)	Industry publications	% of total 'Industry' dataset (n=121)	Total publications	% of total dataset (n=991)
Healthier alternative	164	18%	46	38%	197	20%
Cutting down, quitting or switching	202	23%	21	17%	220	22%
Smokefree legislation and beating the ban	231	26%	6	5%	232	23%
Second-hand smoke	35	4%	2	2%	37	4%
Smell, taste and cleanliness	51	6%	8	7%	59	6%
Price	83	9%	12	10%	90	9%
Flavours	93	10%	16	13%	175	18%
Celebrity	110	12%	10	8%	112	11%
Sponsorship	34	4%	3	2%	35	4%
Regulation	203	23%	64	53%	250	25%
Harm reduction	33	4%	25	21%	56	6%

Notes: *n=22 articles overlapped both the 'independent' and 'industry' datasets therefore this column is not the sum total of columns 2 and 4. †Searches for this theme only were for the precise term 'harm reduction' rather than the concept of harm reduction.

2.1.2 Social media analysis

Data for the social media analysis was collected through non-participant observation of communications on Social Network Sites (SNS) – a method that has previously been used to examine virtual communities in online settings (Hewer P and Brownlie D, 2007).⁶¹

This methodology builds on the work of Kozinets (1998, 1999)^{62 63} and involves the analysis of images and text on five of the most popular SNS: Facebook; Twitter; Tumblr; YouTube; and Pinterest. In order to explore how e-cigarettes were framed on SNS in the period surrounding the announcement from the MHRA, online data collection was limited to a period of 20 days leading up to (23rd May – 12th June 2013) and 20 days following the announcement (13th June – 3rd July 2013).

i) Brand Identification

E-cigarette brands were identified using the established technique of Google searches and pre-specified search terms (Kozinets RV, 2010). The following Google searches (conducted on 03/06/13) were used to identify electronic cigarette brands:

- “top selling e-cigarette brands UK”
- “e-cigarettes UK”
- “UK electronic cigarette brands”
- “electronic cigarettes largest selling UK”

⁶¹For example, searches for the ‘healthy alternative’ theme included: alternative* OR healthier OR healthy; searches for the ‘cutting down, quitting’ theme included: quit OR quitting OR “cut down” OR “cutting down”; and searches for ‘price’ theme included: price* OR cheap* OR cheap OR expensive OR cost OR costing OR costs OR equivalent.

Seven leading electronic cigarette brands were identified through internet searches, which needed to satisfy four inclusion criteria to be included in our social media audit:

- a visible online presence, with an official page on Facebook AND Twitter AND a visible presence on YouTube, Pinterest and Tumblr
- in existence for at least 18 months
- at least 2,000 likes or Facebook followers
- a brand that is distributed in the UK

Following the results of the searches, the brands identified were: E-lites; Nicolites; Sky Cig; Totally Wicked; Vapestick; Vapouriz; and VIP.

ii) Data capture and analysis

Data from the social media audit was captured and analysed using Nvivo 10. The software tool 'Ncapture' allowed information to be gathered in the form of textual datasets (including user comments) and PDF images. Textual datasets and PDF images were obtained for the e-cigarette brands on Facebook and Twitter for the time periods specified, and textual datasets (including viewer comments) were captured for the top three videos on YouTube following searches for the specified brand (e.g. 'Nicolites' or 'VIP electronic cigarette'). PDF images were collected to reproduce the search results and facilitate coding (especially of images). Searches were also conducted on Pinterest and Tumblr for the specified e-cigarette brands and PDFs of all results mentioning the brands were captured. The data was then coded for thematic analysis in Nvivo using the codes and themes that had emerged from the traditional media content analysis.

iii) Ethical issues

It is recognised that the use of data from SNS raises unique methodological and ethical dilemmas for researchers. This research has only used information which is publicly available (Kozinets RV, 2010).⁶⁵ Terms and Conditions on Facebook regarding a page for a brand, entity (place or organisation), or public figure state that: 'Content posted to a Page is public and viewable by everyone who can see the Page'. Facebook's terms also state: 'When you publish content or information using the Public setting, it means that you are allowing everyone, including people off of Facebook, to access and use that information, and to associate it with you' (Facebook, 2013).⁶⁶ Information provided in forums or spaces on the internet and web that are intentionally public can legitimately be considered 'in the public domain', but the public nature of any communication or information on the Internet should always be critically examined, and the identity of individuals protected unless it is critical to the research, such as in statements by public officials (ESRC, 2012).⁶⁷

2.1.3 Qualitative semi-structured interviews

Qualitative semi-structured, in-depth interviews (n=5) with professional marketing and communications experts were conducted, recorded and transcribed in order to:

- understand more about the crafting of marketing strategies aimed at particular segments of the population;
- explore potential target consumers for e-cigarette companies;
- gain an insight into future marketing developments in this field; and
- corroborate findings from the dataset.

Experts were also presented with a series of marketing advertisements for various e-cigarette companies and several types of e-cigarettes in their branded packaging.

3 General findings

The dataset revealed that there are two clear e-cigarette sectors: independent e-cigarette companies; and tobacco companies that have invested in the e-cigarette market. Marketing strategies for both subsections will be explored.

It is also apparent from the dataset and expert interviews that e-cigarette marketing may appeal to two consumer groups: the committed smoker, who may be thinking about quitting; and the younger social smoker or non-smoker. Marketing strategies for both consumer groups will be explored.

Finally, there is evidence that e-cigarette companies are also using stakeholder marketing (Tomas M. Hult G et al, 2011).⁶⁸ Marketing strategies aimed at other stakeholders rather than just consumers will therefore also be examined.

As noted in section 2.1, the various marketing strategies will be presented under the four variables (the 4 Ps) – Product, Price, Promotion and Place – of the marketing mix. The analysis will be presented separately for independent e-cigarette companies and tobacco companies that have invested in the e-cigarette market.

4 Independent e-cigarette company marketing strategies

Three alternate marketing strategies by independent e-cigarette companies were identified and are detailed in Figure 4.

Figure 4: E-cigarettes – the marketing strategy

Marketing challenge	Alternate strategies		
Who	Smokers	Non- smokers	Stakeholders
Objective	Long-term sales through 'next generation' product, profit-maximisation	Long-term growth through 'next generation' product, profit maximisation	Respectability, distance from tobacco, part of the solution
What	Nicotine, dependence and loyalty, potential cessation aid, dual use (with cigarettes), cutting down	Lifestyle, 'must have' accessory	A lifeline for hardened smokers, harm reduction, public health gain
How	<p>Product: safe nicotine, used anywhere</p> <p>Price: financial – cheaper than tobacco, psychological – no risk</p> <p>Promotion: press, trade press, TV, magazines, social media, sponsorships</p> <p>Place: everywhere tobacco is available, company websites, point of sale displays</p> <p>Positioning: socially acceptable smoking alternative, necessity</p>	<p>Product: innovations like shisha, flavours, lifestyle accessories</p> <p>Price: financial – 'reassuringly expensive', psychological – cool as can be</p> <p>Promotion: lifestyle and celebrity</p> <p>Positioning: socially acceptable luxury</p>	<p>Product: harm reduction</p> <p>Price: financial – priceless, saving lives, psychological – it would be negligent to ignore this offering</p> <p>Promotion: health bodies/ experts, charities, politicians</p> <p>Place: regulated or unregulated/self-regulated space</p> <p>Positioning: reframe perceptions of nicotine use, alternative for those who can't or won't quit</p>

The committed smoker, who may be thinking about quitting, was identified as a key consumer for e-cigarette marketers in the dataset and by marketing experts. When interviewed, marketing experts said:

'...obviously people who are considering giving up cigarettes and are looking for something to do with their fingers, hands you know in a social situation where there are other people or prompts at a particular time...if somebody is just having a cigarette in the mid-morning, presumably they are wanting something that will give them the nicotine buzz at the same time...'

'...people who are existing smokers, people who are maybe considering giving up smoking, people who want to smoke in a social situation, but don't want to have the exclusion or the inconvenience of going outside to smoke. I think I would pick those audiences off first...'

'...The kind of obvious territory is the people who are trying to give up smoking...'

'I would imagine you are targeting people who are... giving up, who are addicted to cigarettes...'

4.1 Marketing strategy aimed at committed smokers

4.1.1 Product

To secure long-term sales, independent e-cigarette companies have aimed marketing strategies at committed smokers using nicotine dependence as an entry point. The promise here is safe nicotine – a product which satisfies the smoker's need for an addictive product without all the harm associated with combustible cigarettes. To this end, the product has been dubbed the healthier alternative.

i) Healthier alternative and a 'safer' product

There were 164 references^{aa} (18% of the independent dataset) in the audit to e-cigarettes being the healthier alternative. These claims were made about e-cigarettes generally, and specific brands on the market.

E-Lites, for example, presented 'the concept of smoking reinvented – a modern, healthier alternative to smoking tobacco' (I MacLeod, The Drum).⁶⁹ Competitor, SKYDIG, offered the product as 'the perfect tool for anyone looking to quit smoking cigarettes or are looking for a healthier alternative' (Features Editor, The Express);⁷⁰ while the managing director for Vapouriz stated in the press that 'most people use electronic cigarettes as a healthier alternative to smoking tobacco' (Features Editor, The Grocer).⁷¹

^{aa} This figure excludes mentions on social media platforms.

The assertion that e-cigarettes are the healthier smoking alternative was generally accepted as a statement of fact and frequently qualified by the claim that it is a 'safer' product, particularly when compared to combustible cigarettes. Other reports claimed that the products are 'harmless'.

The following statement appeared in the trade press when eKarma launched in the UK:

'It's safer too – with most electronic cigarettes the vapour is drawn over the battery creating a potential danger to the consumer should the battery leak; eKarma has a separate battery compartment so the vapour is isolated from any potential harmful contamination'
(Talking Retail.com)

In a further example, the customer service team at Easy Cigs sent a letter to a local newspaper in response to an article on an e-cigarette user being banned from a pub stating that the establishment should:

'..."wake up and smell the coffee" as you certainly cannot smell the smoke - because it's vapour - utterly harmless to the user and the general public, a fact acknowledged also by Leicester City Council' (Mercury Mailbox, Leicester Mercury).

In a tabloid feature on the '5 of the best stop smoking products', two of the five products mentioned were e-cigarettes even though they are currently unlicensed NCPs. The Electric Zebra was presented as 'electric cigarettes [that] act like normal fags and still contain nicotine, but there's none of the cancer causing burning of tobacco, as the 'smoke' is harmless water vapour'. SKYCIG Freedom was described as 'another 'e-cigarette' that offers inhaled doses of nicotine without the carcinogenic chemicals'. Links to the companies' websites were provided in the feature, which added promotional value (Features Editor, Daily Mirror).⁷⁴

According to the ASA, however, advertisements making the abovementioned claims are banned.

Figure 5: Why claims that the e-cigarette is a 'harmless' product are not allowed in adverts

As a consumer product, the marketing of the e-cigarette is subject to regulations enforced by the Advertising Standards Authority (ASA), which takes action against misleading, harmful or offensive advertisements across the media (ASA, 2013).⁷⁵ The UK Code of Non-broadcast Advertising, Sales Promotion and Direct Marketing (CAP Code), which is enforced by the ASA, has advised on the way in which e-cigarettes may be marketed. Marketers have been instructed to avoid making 'claims that smoking e-cigarettes containing vaporised nicotine is healthier than smoking tobacco, or risk free, unless they have robust clinical evidence to support their claims' (CAP, 2013).⁷⁶



In 2012, the following claims on a CIGIREX advertisement were found to be misleading as the advertisers did not have evidence to illustrate that the product was harmless:

'[CIGIREX]...may help you stop smoking tobacco cigarettes in a very short period of time with none of the side effects' and is 'a carcinogen-free nicotine oral delivery system' (CAP, 2013). The company went on to promote its product online by focusing on the 'the personal pleasures' of the e-cigarette in comparison to tobacco cigarettes, such as the ability to smoke 'in places where traditional smoking has been banned' (Cigirex website -see image above).⁷⁸

In 2012, the ASA also ruled that a comparable advertisement by a different e-cigarette brand was misleading as there was insufficient rigorous evidence to prove it was safe:

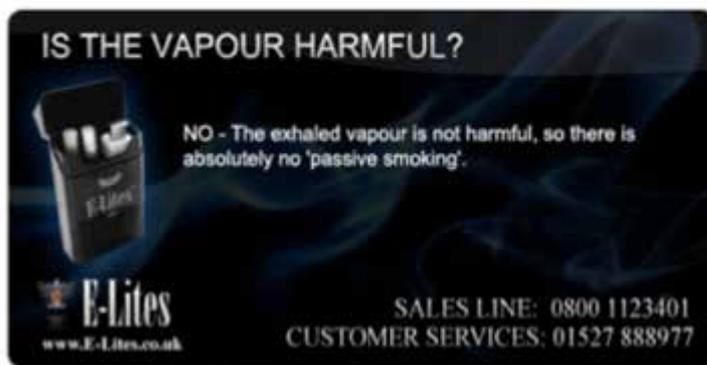
'..you can enjoy them safely, anywhere you want' (CAP, 2013) ⁷⁹

Figure 6: Example of a claim that the e-cigarette vapour is 'harmless' (E-Lites Tumblr post)

In the dataset, e-cigarette safety was typically framed in relation to the product's lack of 'tar', 'toxins', 'carbon monoxide', 'chemicals', and 'carcinogens'.

Examples include a news report, which featured the following quote from the owner of an E Lounge Vaping store who mentioned that the shop stocks the Totally Wicked brand:

Is The Vapour Harmful On An Electronic Cigarettes



'It's an alternative way of smoking...It's healthier than a normal cigarette because the electronic ones don't have those other carcinogens that make normal cigs so bad for your health. So there's no tar or carbon monoxide...' (S Begum, Manchester Evening News)

A representative from Skycig noted that 'there's no tar, no carcinogens and none of the 4,000 chemicals found in cigarettes' (G Mackie, Scotland on Sunday);⁸² an article highlighting the benefits of using Electric Zebra stated that the product 'contains nicotine but is said to be free of any harmful carcinogens, tar or chemicals that occur with the burning of tobacco, while maintaining the taste of a normal cigarette' (HotelManagement-Network.com);⁸³ and a competitor brand stated 'VIP has launched its e-cigarette here - an alternative to everyday fags - which contains nicotine but none of the harmful chemicals' (M Doyle, The Sun).⁸⁴

ii) Cutting down, quitting or switching

There were 202 references^{bb} (23% of the independent dataset) in the audit to cutting down, quitting or switching, and the product was generally accepted as a smoking cessation aid.

The Metro, for example, reported that 'electronic cigarettes have helped almost nine out of ten smokers quit tobacco completely' (Metro, 2013),⁸⁵ but did not mention that this was 'based on the results of an online survey on e-cigarette use and their effects on tobacco consumption' and 'the survey's participants were mainly recruited via the websites of two leading manufacturers of e-cigarettes (Nursing Times, 2013)'.⁸⁶

Several cessation claims were made through case studies of smokers, who say they used the product to help them quit. For example:

'Reformed smoker [X] uses a battery-powered plastic cigarette, which dispenses nicotine but no smoke, to help him quit (D Martin, Leicester Mercury)'⁸⁷

'A £1,000 reward has been claimed after it was offered to smokers quitting the habit at Teeside Telecoms company, Odyssey System...[the company's managing director] was so keen to see his team improve their health that he not only offered the reward, he also gave out electronic cigarettes to help them...[team member] said: "I have smoked for years and years and tried to quit in the past, but never done so well.' (Business News, The Journal)⁸⁸

Some cessation success stories were linked to specific brands or shops selling solely e-cigarettes:

'[shop owners] were inspired to launch E Lounge Vaping after quitting their own 40-a-day habits using e-cigarettes supplied by Totally Wicked, Blackburn' (S Begum, Manchester Evening News).⁸⁹

'Today Intellicig, which has its own filter developed in Manchester by Lord, is also stocked by more than 5,000 retailers and independent pharmacies in 26 countries. The market for electronic cigarettes is currently worth 30m in the UK and \$500m in the US. They are aimed at smokers wanting to quit or cut down, but still seeking a nicotine kick' (K Feddy, Manchester Evening News).⁹⁰

'The Electronic Cigarette Store opened last month and aims to help people kick the habit by switching to electronic cigarettes' (W Fnode, Manchester Evening News).⁹¹

'IF YOU are under pressure to quit smoking but not willing to give up nicotine, Smokex may be one way to keep everyone happy' (Features, The Sun).⁹²

^{bb} This figure does not include references on social media platforms.

In this instance, a strong cessation claim was made for a branded e-cigarette starter kit that was offered as a prize for completing a puzzle:

'SKYCIG e-cigarette allows you to enjoy the act of smoking, yet without the 4,000 harmful chemicals found in traditional cigarettes, making it an indispensable tool in the pathway to quitting. REMEMBER, the ONLY way to win our great Mentathlon Grand Prize is to call...' (Features, The Express).⁹³

A feature on New Year resolutions advocated the sale of two brands of e-cigarettes. Product prices, promotional codes and details on where to purchase them were also provided:

'GREAT DEALS TO HELP YOUR NEW YEAR'S RESOLUTIONS...IT'S the morning after the night before and I am guessing your New Year's resolutions are intact - so far. I want to help you keep it that way by highlighting great offers on products to keep up your resolve. SMOKING ELECTRONIC cigarettes are the fastest-growing way to help smokers quit - and you can still get your nicotine fix. The Smoker's Halo Mini Kit from ecigarettedirect.co.uk is £19.99 and is the equivalent of 80 cigarettes. From now until February 1 you can get £10 off by entering the code CRUNCH50. The Nicolites rechargeable electronic cigarette kit comes with two cartridges, each the equivalent of 20 cigarettes. Use the code CRUNCH at nicolites.co.uk to get the kit for £11.99, saving £8.' (Features, The Sun)⁹⁴

Some marketing experts noted how cessation presents a weak business model for e-cigarette companies and may be problematic for marketers. One explained:

'...should you be helping people to give up smoking... there is a logic to that which is that your product will get a smaller and smaller market...if you have a product that helps people to stop smoking and so the pool of smokers out there gets smaller and smaller, then your market gets smaller and smaller...the market definition for e-cigarettes is defined or shaped by the existence of smoking. This to me is the essential...issue about marketing it...e-cigarettes...are only attractive for as long as smoking continues to be attractive...without the existence of real cigarettes, e-cigarettes make no sense at all...'

(Marketing Expert)

iii) Smokefree legislation, beating the ban and second-hand smoke

There were 231 references^{cc} (26% of the independent dataset) in the audit suggesting that the e-cigarette is a product that can be used indoors and/or circumvent the smoking ban, even though these claims are not permitted in advertisements (see Figure 7). In some instances, the ability to use e-cigarettes indoors was highlighted as a redeeming feature, key benefit and/or reason for purchase. Examples include:

'There is no risk to others from passive smoking, as the e-cigarette produces water vapour, not smoke' [Electric Zebra brand] (Welwyn & Hatfield Times)⁹⁵

'7s Premium Electronic Cigarettes is an alternative presenting several advantages for the tobacco smoker, and can be smoked almost anywhere' (Progressive Media, 2012)⁹⁶

And, in an article on the e-cigarette company that developed the VIP brand, it was noted that:

'Electronic cigarettes contain pharmaceutical nicotine, which is also used in nicotine patches, to help wean smokers off cigarettes, and they can be smoked indoors' (S Begum, Manchester Evening News)⁹⁷

One company emphasised the freedom associated with using the product in all places by registering its e-cigarette under the trademark 'Lite-Up Anywhere Ltd' (UK Govt News, 2012).⁹⁸

According to the ASA, however, advertisements making the abovementioned claims are banned.

Figure 7: Why claims that the e-cigarette can be used 'anywhere' are not allowed in adverts

In October 2012, the ASA ruled that a ClearSmoke advert stating 'SMOKE ANYWHERE. ClearSmoke electronic cigarettes are smoke-free and flame-free, meaning you can enjoy them safely, anywhere you want' was misleading.

The authority noted that 'regardless of the legal position on the use of e-cigarettes compared with smoking conventional cigarettes, policy on whether the use of e-cigarettes was actually allowed varied between organisations, employers, etc. meaning that, while it might not be illegal to use e-cigarettes, it was not always allowed in all situations' (ASA, 2012).⁹⁹

^{cc} This number excludes references on social media sites.



Source: Zimbio.com

Some reports stated that e-cigarettes do not produce second-hand smoke and are therefore allowed indoors. There were 35 references^{dd} (4% of the independent dataset) in the audit suggesting that the product did not impact passive smokers. Examples include:

'Part of the attraction is that electronic cigarettes provide a smoking alternative that can be used indoors as there is no danger of passive smoking' (News, Birmingham Post).¹⁰¹

'E-Lites recreate the sensation of a traditional cigarette without the smell, smoke, legal restrictions or impact on passive smokers' (E-Lites website).¹⁰²

In a feature on the brand ROK: 'Legal to smoke almost anywhere: Many countries now ban smoking in most public places. However, as no tobacco is being burnt, smokers can enjoy an e-cigarette just about anywhere' (Features, Daily Record).¹⁰³

In an article on the Electric Zebra Brand: 'The e-cigarette produces an odourless water vapour instead of smoke so it can be smoked indoors, reducing break times' (Progressive Media).¹⁰⁴

And in the trade press, retailers provided the following reasons for stocking e-cigarettes:

'The e-cigs are also far more convenient, saving smokers from having to go outside for a smoke during a night out, or after a meal' (Talking Retail.com)¹⁰⁵

'Some people buy them so they can "smoke" in public places...' (Talking Retail.com)¹⁰⁶

It is evident from the dataset that some local pub owners welcome the use of e-cigarettes on their premises and see them as an opportunity for more business:

^{dd} This does not include references on social media platforms.

'My new idea for smokers is to get in electronic cigarettes to sell behind the bar. People are scared to try them, but I think they're a brilliant idea. People can smoke indoors again and there could be a great bounce-back for pubs' (P Mellows, Morning Advertiser)¹⁰⁷

'...“We're happy to have people vaping in here [pub]”...“It's helped trade, but more than that it's helped the atmosphere in the pub. People don't have to go out the back for a smoke although some still do that and from a community point of view it's more inclusive. We've also found that e-cigs spark a lot of conversation. They're the subject of some very interesting debates. But I've never heard any disparaging comments or complaints about them. I believe they're absolutely good for pubs”...’ (P Mellows, Morning Advertiser)¹⁰⁸

The use of e-cigarettes indoors, however, has created confusion for shops, restaurants and social venues, and raised questions about product's legal status in relation to smokefree legislation. Several organisations and companies have decided to ban the product for various reasons.

Figure 8: Why beating the ban may be good for the e-cigarette marketer, but may create confusion

For shops, restaurants and social venues

'...we [restaurant and club] had only one instance, which was settled amicably. But it's a baffling situation, and we have not yet made up our minds whether we are going to be for or against banning'.

'...If some people eating Sunday lunch here [pub restaurant] were to object, then I'd ask such a smoker to stop, and if he or she didn't I'd ask them to leave. “But if nobody objected, I'd let the electronic smoker continue'.

'We [pub inn] have a total ban on all kind of smoking. It's because we don't want to be in a situation where our staff have to distinguish between liquid smoke and a normal cigarette'.

'We [local football club] don't allow smoking of any kind, and we include e-cigarettes, because it sends out confusing signals to other smokers'.

Source: N Lillitos, Kent Messenger¹⁰⁹

Legal status

'...a consultant at the Employment Law Advisory Service (ELAS), said bosses are in a quandary as the cigs have not yet been proven to be safe or harmful...For workplaces that ban smoking on their premises, including in outdoor spaces, it makes sense to ban the e-cigarette too' (The Sun)¹¹⁰

'Q. I have recently seen more customers in my pub using electronic cigarettes. Can you just confirm that this is legal? A. A typical battery-operated electronic cigarette does not fall within the ambit of The Health Act 2006, which prohibits smoking indoors. It is, therefore, legal for your customers to use these products in your pub, and for you to allow them to do so. However, this is of course ultimately your choice as licensee. Looking into the future, if the Government continues to allow the use of electronic cigarettes (and the signs are that it will, subject possibly to regulation) more smokers may move over to them, which might resolve some of the issues arising with outside smoking areas' (Morning Advertiser)¹¹¹

'It happens like this: suck on my electronic cigarette. A woman appears, tells me such things are banned and that I must put it out. (She means away.) I explain it is a legal replacement for a fag, not a fag, and call for management. I give her a laminated card which explains the law'
(T Gold, The Spectator)

Reasons for banning e-cigarettes

'Rail operator First Capital Connect (FCC) says the 'cigarettes', which release water vapour instead of harmful smoke, could "unsettle other passengers"... "We have a no smoking policy regardless of the type of device customers would like to smoke' (Welywyn & Hatfield Times)¹¹³

'A pub spokesman said some customers seemed a little confused by the ban, as the cigarettes were deemed legal in most licensed premises..."The company decided to stop allowing these cigarettes due to a lot of complaints from customers about the odours they give off. Some of them actually look like real cigarettes, which may give a bad impression to other customers'
(Scunthorpe Telegraph)¹¹⁴

'ELECTRONIC cigarettes have been banned at a university over fears they could be dangerous to students - and even start fires...concerns were raised that electronic cigarettes could lead to confusion over the university's smoking policy' (C Foote, Aberdeen Evening Express)¹¹⁵

'The JD Wetherspoon chain bans e-cigarettes from its premises across the country. "In a busy pub and JDW pubs are always busy it is difficult to differentiate between an e-cig and a regular cigarette, and we do not want to police the situation...Therefore our blanket policy is to ban them"...'
(P Mellows, Morning Advertiser)¹¹⁶

'...we have a no smoking policy inside the [football] stadium, and this also goes for the electronic cigarettes. If we see someone smoking one, we have to ask them to go outside the stadium to one of the smoking areas we have and they are quite happy to do so' (Leicester Mercury)¹¹⁷

'A HEALTH board have banned electronic cigarettes. NHS Fife's decision comes amid safety fears about the alternative to real fags. Bosses say they contain a heating element that could ignite bedding or clothing in hospitals' (Daily Record)¹¹⁸

'...one of the things I would work the PR around is where it connects with my anecdotal stuff, which is around that kind of thing of people not being sure how to react when they see someone with an e-cigarette...if someone gets an e-cigarette out [in a restaurant] and starts smoking it....there have been lots of instances where people have been turfed out of places for doing it...so if I were a company who owned this [an e-cigarette], I would be working very hard to normalise this behaviour, I would be defending people who had been thrown out of places, and I would use...organisations like ASH and whoever else who supports it, to defend my case and I would immediately by doing that be normalising a behaviour that has become abnormal and something visually that has become abnormal. Now you still couldn't light up a cigarette [in a restaurant], but I would be normalising the whole behaviour, because you can't distinguish, it's so similar visually, the visual clues are exactly the same as real cigarettes, that's the great advantage of it...'

(Marketing Expert)

One marketing expert explained how e-cigarette marketers could use the smoking ban to promote their products (see above).

'...they [e-cigarettes] could reinforce your smoking behaviour because you can do it at times when you wouldn't otherwise be able to smoke, so therefore you could still keep smoking...you wouldn't have to go outside...there is a kind of ambiguity about it...'

(Marketing Expert)

Another noted how using e-cigarettes indoors has the potential to boost product sales through the promotion of dual use (see left).

iv) Smell, taste and cleanliness

There were 51 references^{ee} (6% of the independent dataset) in the audit to the e-cigarette's smell, taste and cleanliness, and these product features were sometimes linked to specific brands:

'There's no ash and no smoky smell, plus e-cigarettes do not contain carbon dioxide or tar. Vapestick has the V2 disposable...' (T West, Forecourt Trader)¹¹⁹

The director for Electric Zebra was quoted saying: 'In a customer facing role, staff smelling of smoke is a problem, as it's off putting for guests and perceived as unhygienic' (Progressive Media), and a Skycig feature noted: 'Inhaling just the nicotine vapour gives the user a realistic experience of smoking, without the intrusive smell or lingering odour. (SkyCig advert)¹²¹

A competitor noted:

'Each E-Lite cigarette contains a nicotine solution that users inhale as a vapour, recreating the sensation of a traditional cigarette without the smell, smoke or impact upon passive smokers' (A Rennie, Paisley Daily Express)¹²²

There were also several personal accounts from smokers, who welcomed the pleasantness of getting nicotine without smelling like an ashtray:

'With the advent of the electronic cigarette, I would say that anybody who smokes cigarettes now is a fool to themselves when there exists a safer and much cheaper method to satisfy a nicotine addiction. One that does not make them a social pariah, or smell like a dirty ashtray' (P Ogden, Manchester Evening News)¹²³

'No more offending bystanders with my secondhand smoke. People tell me I smell better too. So why not give it a try?' (Target Series).¹²⁴

'No more stained teeth or fingernails, skin damage, bad breath and no tobacco smell on your clothes or in your home.' (Birmingham Mail)¹²⁵

'They are healthier than normal cigarettes and don't leave a horrible smell on clothes and fingers after you've inhaled' (J Marsh, The Sun)¹²⁶

An additional product feature that emerged from the dataset was its taste and how similar it is to tobacco. Electric Zebra maintained its product 'taste[s] of a normal cigarette'; competitor VIP stated that it had 'produced a suitable long-term smoking alternative which could offer the same taste and sensation as a normal cigarette without the dangerous side-effects' (M Doyle, The Sun); and ROK offered products with various levels of nicotine, which would allow smokers to reduce intake 'while still enjoying the taste and sensation of smoking' (Daily Record)¹²⁸

^{ee} This figure excludes references on social media sites.

^{ff} The article makes reference to 'carbon dioxide' not carbon monoxide.

^{gg} This figure excludes references on social media platforms.

4.1.2 Price

There were 83 references⁹⁹ (9% of the independent dataset) to the product price in the audit, mostly stating that the e-cigarette is cheaper than its combustible counterpart.

Figure 9: Examples of price as marketing strategy used by e-cigarette brands to appeal to committed smokers

'E-Lites offer a harm reduction alternative and we know that we can give smokers a healthier and cheaper option to tobacco cigarettes' (E-Lites website)¹²⁹

'We have spent three years developing the VIP brand with our customers in mind...Most of our clients choose e-cigarettes because they are cheaper to buy...' (Manchester Evening News)¹³⁰

'Each VIP high capacity refill contains approximately 40 traditional cigarettes' worth of nicotine and is up to six times more efficient than a standard electronic cigarette cartridge. It's up to 80 per cent cheaper than smoking, saving people approximately '3,000 a year' (M Doyle, The Sun)¹³¹

According to Skycig: 'These [e-cigarettes] are up to 75 per cent cheaper than regular cigarettes' (G Mackie, Scotland on Sunday)¹³²

'Vapesticks claims to be 40-50 per cent cheaper than regular cigarette...'
(A Kay, Scottish Daily Express)¹³³

'One of the other big advantages of using electronic cigarettes are the cost savings that can be made. According to SKYCIG, an average customer saves £1,500 per year when compared to the cost of smoking traditional cigarettes, it is also 75 per cent less expensive' (SkyCig advert)¹³⁴

Price incentives in the form of 'starter kits' were also offered for smokers seeking to buy the product for the first time:

'INCIG's aim is to offer the everyday smoker an affordable, reliable and stylish e-cigarette. Both new and existing customers will save 25 % on the purchase of the Avantis Starter kit, and become part of the e-cigarette craze' (SkyCig advert)¹³⁵

'Have a look at www.e-lites.co.uk, where starter kits begin at pounds 19.99' (Sunday Mail)¹³⁶

'The discreet Skycig starter kit (£49.99) can be recharged on the move...' (The Express)¹³⁷

'The VIP 'Cartomizer' refill needs to be replaced when the vapour significantly reduces. Simply replace the used refill with a new one.' The price of the e-cigarette works out at about '1.50 for 20 cigs. The starter pack is '29.95 and refills are '14.95 for 200 cigs. But when bought together it's only '39.95 for the battery charger and 280 cigs' (M Doyle, The Sun)¹³⁸

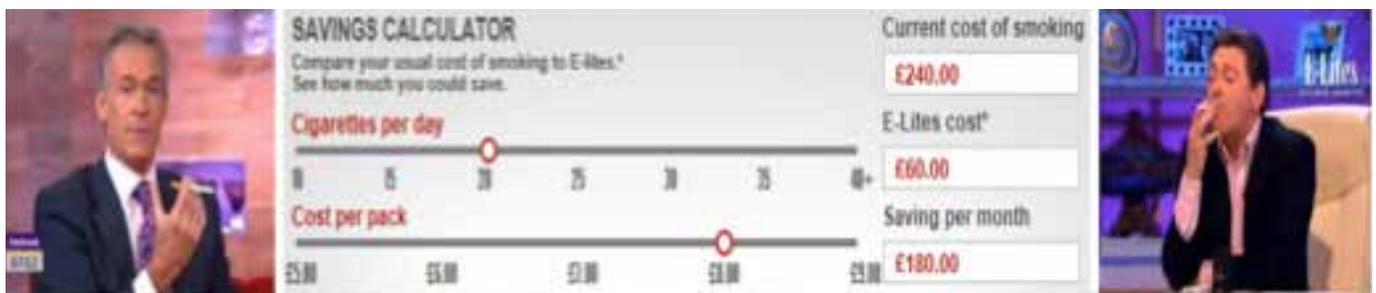
'Its starting packs include a USB kit (£18.95) and a deluxe kit (£39.95). Both contain everything required to get started and, for a short time, there is an introductory offer to get a free Gamucci Micro USB starter kit' (J Morrow, The Metro)¹³⁹

Price promotions were also offered in the trade press so retailers seeking to sell the products for the first time could keep outlays to a minimum:

'Vapestick has the V2 disposable. It comes ready to use and offers the consumer 300 puffs, which is equivalent to 25-30 cigarettes. It is available in a counter-display unit holding 12. The unit currently costs £38.88 plus VAT and each V2 then retails at £5.99. They are available on a sale-or-return basis until February 22' (T West, Forecourt Trader)¹⁴⁰

'Vapourlites too are available on sale or return. There is also a special offer for new customers. Anyone buying the CDU one (£86.70 plus VAT, rrp £187.79) will receive 5x5 packs of 'cartomizers', worth £49.95 at rrp. The CDU1 contains 10xVL3 disposable e-cigs, 5x5 cartomizers, two VL7 premium starter kits and four VL4 rechargeables.'¹⁴¹

Figure 10: A savings calculator on an e-cigarette website complete with celebrity endorsements to illustrate how cost effective the product is when compared to tobacco cigarettes (E-Lites website)



4.1.3 Promotion

i) Press, trade press and magazines

While few articles in the newspapers audited were paid advertisements, there were numerous mentions of specific e-cigarette brands in news features. Brand awareness was generally raised by company representatives, who were quoted in stories relating to e-cigarettes. In some instances, these quotes were sourced from press releases that were sent to newswires.

Figure 11: References to specific e-cigarette brands in traditional media content analysis and specific e-cigarette brands in newspapers

Brand	No. of times mentioned	
	Newspaper	Press release
5 colours	7	1
Blu	3	3
E-lites	53	0
Electric Zebra	4	0
Gamucci	3	0
Intellicig	8	1
Nicolites	19	4
NJOY	2	4
Smokers Halo	2	0
Skycig	19	8
Totally Wicked	12	4
Vapesticks/Vaps	6	0
VIP	8	1

Independent e-cigarette companies also ‘created’ the news by funding surveys relating to smoking, which resulted in their brands appearing in print – often with a quote from an e-cigarette company representative and a link to the product’s website. Examples include:

‘Scotland is a country of secret smokers, according to new research...The survey of 2,000 smokers by e-cigarette brand E-Lites also revealed that 32 per cent of Scots smokers have been hiding their habit for more than 10 years... managing director of E-Lites, said: “Smokers in Scotland are lying to themselves and others about their habits, with many of them admitting to being ashamed of being a smoker. Each E-Lite cigarette contains a nicotine solution that users inhale as a vapour, recreating the sensation of a traditional cigarette without the smell, smoke or impact upon passive smokers.” For more information about E-Lites, visit the website www.e-lites.co.uk’ (A Rennie, Paisley Daily Express)¹⁴³

‘TAKING up ciggies led a poll of most people’s regrets, with 88% of smokers wishing they had never started, it emerged yesterday... Another 28% wished they had tried harder to get friends or family who smoked to cut down or quit...CEO of e-cigarette brand E-Lites, said: “Luckily many things on the list are rectifiable and actions can be taken to ease the feeling of regret”...’ (B Rossington, Daily Mirror).¹⁴⁴

‘Loud music, Christmas lights left up all year, discarded fag butts, untidy gardens and broken fences also cheese us off, according to the poll by electronic cigarette firm ECigaretteDirect.co.uk’ (The Sun)¹⁴⁵

'SWEARING is the most difficult habit to break, beating the likes of drinking too much caffeine, smoking, and chewing finger nails, according to a poll. More than a quarter (26 per cent) of the 600 people questioned in the survey by ECigaretteDirect said that using too many expletives was their biggest vice' (The Herald)¹⁴⁶

'IT IS more socially acceptable for men to smoke than women, a study claims. Researchers also revealed that women light up as a way of rewarding themselves when dealing with stress...The survey of 1,000 people was commissioned by Edinburgh firm SkyCig, which manufactures electronic cigarettes' (S Deal, The Metro)¹⁴⁷

E-cigarettes were promoted as prizes for competitions in magazines, which allowed e-cigarette companies to describe key product features, its price and provide a link to its website:

'Text PRIMA PRIZE5 to 87088 (£1.50)...20 quit smoking kits...SKYCIG, the UK's leading provider of e-cigarettes, is giving 20 readers the chance to give up smoking with a starter kit, worth £50. With a small dose of nicotine, the SKYCIG e-cigarette produces vapour which has the appearance and flavour of tobacco smoke, and gives the same physical sensation. The SKYCIG e-cigarette allows you to enjoy the act of smoking without the 4000 harmful chemicals found in traditional cigarettes. Visit <http://www.skycig.co.uk>' (J Bartley, Prima)¹⁴⁸

'LEADING electronic cigarette company E-Lites is offering three lucky winners £100 of free products. Research conducted by E-Lites has revealed the average smoker spends £27.54 a week on almost four packets of cigarettes and admits they have gone without paying bills, a holiday and family days out so they have enough money for their next packet. This January why not reduce your outgoings and switch to E-Lites, which have reinvented smoking? For more information on E-Lites visit www.e-lites.co.uk. REMEMBER, the ONLY way to win our great Mentathlon Grand Prize is to call ...' (The Express).¹⁴⁹

Independent e-cigarette companies also marketed their products in the trade press (see below).

Figure 12: Example of advertisement in the trade press aimed at the committed smoker



Source: NJOY Press advert¹⁵⁰

The trade press has also featured multiple page spreads advertising e-cigarettes: June 2012, November 2012 and January 2013 editions of *Convenience Store*, for example, ran features called 'spotlight on electronic cigarettes' with full and half-page sized advertisements for various brands. (*Convenience Store*)^{151 152 153}

ii) Television

Several e-cigarette television adverts have reportedly been approved by Clearcast, which complies with the UK Code of Broadcast Advertising (BCAP) enforced by the ASA. It bans advertisements promoting smoking or the use of tobacco products and its rules state that:

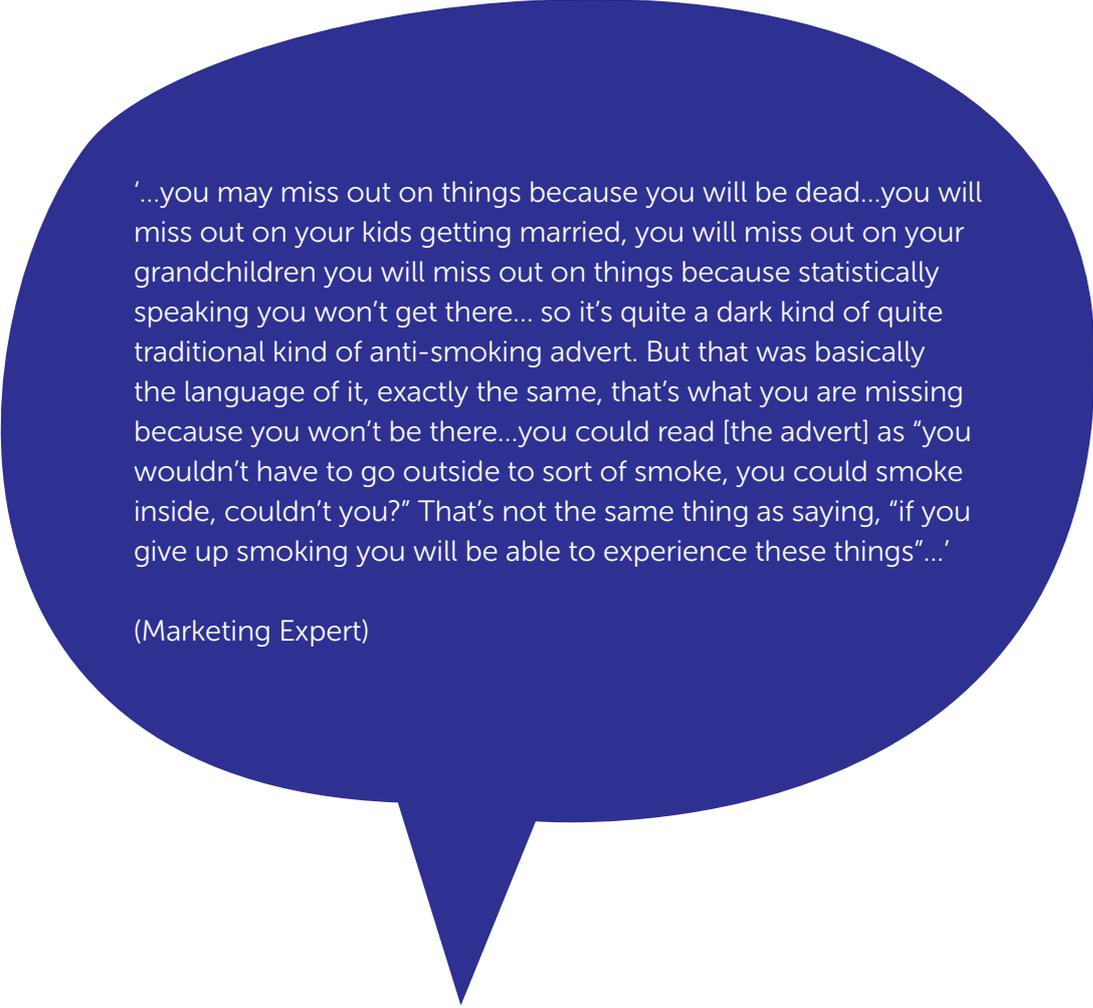
'...if a non-tobacco product shares a name, emblem or any other feature with a tobacco product (which would catch electronic cigarettes), then it can only advertise if it makes no reference to smoking, does not promote smoking and does not include a design, colour, imagery, logo style etc that might be associated in the audiences' mind with a tobacco product' (Clearcast.co.uk)¹⁵⁴

As an advert can only be approved if there is no reference to smoking, e-cigarette marketers rely on sheer creativity when promoting their products (E-cig Click website).¹⁵⁵ The E-Lites TV advert which launched on a national, mainstream British channel in January 2013, for example, was described as 'light-hearted' and 'anti-smoking at its core'. It starred British actor Mark Benton, who stepped outside for a cigarette and consequently missed his baby's first steps and surprising 'Gangnam style dance'. It posed the question 'What are you missing?' (see Figure 13) (L Tesseras, *Marketing Week*).¹⁵⁶ E-Lites reportedly waited more than a year to get approval for it to be screened. (L Tesseras, *Marketing Week*)¹⁵⁷

Figure 13: First e-cigarette television advertisement in the UK



In an interview, one marketing expert noted that the e-cigarette advert resembles traditional anti-smoking adverts without emphasising the underlying 'give up smoking' message:



'...you may miss out on things because you will be dead...you will miss out on your kids getting married, you will miss out on your grandchildren you will miss out on things because statistically speaking you won't get there... so it's quite a dark kind of quite traditional kind of anti-smoking advert. But that was basically the language of it, exactly the same, that's what you are missing because you won't be there...you could read [the advert] as "you wouldn't have to go outside to sort of smoke, you could smoke inside, couldn't you?" That's not the same thing as saying, "if you give up smoking you will be able to experience these things"...'

(Marketing Expert)

A television advert for another e-cigarette brand, SkyCig, which has been aired on satellite channels in the UK, portrays 'young people hanging out, sending the message that life is all about sharing moments' (see Figure 14) (SkyCig advert).¹⁵⁸

Figure 14: Television advertisement screened on satellite channels in the UK



One marketing expert suggested that the advert might appeal to women (see below).

'...it's perfect because it's...that situational marketing thing, it's the coffee, cigarette, cigarette, coffee...you're positioning absolutely in terms of the target group...because there is obviously a stylish woman and...even just to take that frame [Figure 14]... it's that kind of marketing devise where you engage people with the generalities of a demographic in a situation without troubling them with the specifics. You can't even see a face...so it's actually quite good...I can read myself into her. But I know she is quite stylish, white blouse, so there is a working thing there as well. She is not at home with the kids...nice bit of jewellery, so it's tiny but there is lots going on from a kind of deconstructive marketing point of view, but it's the situation, it's the coffee break, it's time on your own, all these things that a lot of people are into, smoking.'

(Marketing Expert)

Another described how it uses situational marketing to promote e-cigarettes (see right).

In the US, the first e-cigarette television advertisement was screened in December 2012 for the brand NJOY Kings with the slogan 'Cigarettes, you've met your match' and the song 'Feels Like the First Time' (NJOY advert)

'...for a start you know this is the classic kind of women's cigarette...it's like elongated, it's kind of quite classy, there is nothing kind of...garish about it, it's quite discrete, but it's still got the kind of...symbols...the type face is more modern than classic cigarette brands, but you know again it's quite soft...'

(Marketing Expert)

4.1.4 Place

It is apparent (from the trade press audit in particular) that e-cigarettes are being sold wherever combustible cigarettes are on sale. However, e-cigarettes are being treated as separate entities rather than related to tobacco in order to minimise restrictions imposed through point of sale (POS) displays. To this end, POS has become an additional marketing tool for e-cigarette companies:

'Vapestick has the V2 disposable. It comes ready to use and offers the consumer 300 puffs, which is equivalent to 25-30 cigarettes. It is available in a counter-display unit holding 12. The unit currently costs £38.88 plus VAT and each V2 then retails at £5.99. They are available on a sale-or-return basis until February 22' (T West, Forecourt Trader)¹⁶⁰

'Under the scheme NFRN members are being urged to stock Nicolites e-cigarettes, which offer up to 40% profit on return and are available on sale or return. Details of special starter packs, which come in compact display units and comprise a range of Nicolites e-cigarettes and refills, are available both from NFRN retail development managers and the NFRN Helpline' (TalkingRetail.com)¹⁶¹

'Electronic cigarettes, lighters and matches are not included [in the display ban], and should not be merchandised in the covered section of the gantry. Opening the gantry to retrieve any of these products would be committing an offence' (G Walker, Convenience Store)¹⁶²

The Grocer has featured a reader offer to win 'a fully stocked counter-top E-Lites display' and a feature on e-cigarettes, which included an Intellicig display on a till counter for point of sale promotion (see Figure 15) (Convenience Store).

Figure 15: Point of display promotion of e-cigarettes as advertised in the trade press



offer 2

Win yourself a fully stocked counter-top E-Lites display

E-Lites, the UK's leading electronic cigarette brand, is giving away a counter-top display unit (rsp: £169.77) to five readers of The Grocer.

The E-Lites patented design offers a unique smoking experience that recreates the sensation of traditional cigarettes without the negative effects of smell, smoke, legal restrictions or impact on passive smokers.

The display elegantly showcases the E-Lites range. For more information on E-Lites visit www.e-lites.co.uk



As e-cigarettes are available to purchase online, most mentions of specific brands include links to company websites. Some sites also include 'store locators' with details of retailers that stock their products. There is also evidence of e-cigarettes being sold in kiosks and stalls in malls.

4.1.5 Positioning

The independent e-cigarette marketer targeting the committed smoker appears to be establishing its product as one of necessity – the ultimate smoking alternative that is socially acceptable:

'E-Lites offer a harm-reducing alternative and we know that we can give smokers a healthier, cheaper and more socially acceptable option to tobacco cigarettes' (M Sweney, *The Guardian*)¹⁶⁶

'We [E-Lites] are not a preachy business but this is an alternative that won't kill you and is a lot more socially acceptable' (E Mullen, *Birmingham Post*)¹⁶⁷

'...E-Lites: they can be smoked anywhere without the socially unacceptable side effects including those associated with passive smoking' (*TalkingRetail.com*)¹⁶⁸

'The new electronic cigarettes meet a growing demand for a more socially-acceptable way to enjoy a cigarette, say the manufacturers [5 Colors]' (G Sheldrick, *Daily Star*)¹⁶⁹

Consumers appear to be responding to this normalisation of e-cigarette use. Some have written in to newspapers to express their views:

'With the advent of the electronic cigarette, I would say that anybody who smokes cigarettes now is a fool to themselves when there exists a safer and much cheaper method to satisfy a nicotine addiction. One that does not make them a social pariah, or smell like a dirty ashtray' (P Ogden, *Manchester Evening News*)¹⁷⁰

'E-cigarettes are a healthier, cheaper and more socially acceptable alternative to smoking rather than a stop-smoking aid. Therefore, making them prescription-only is utterly ridiculous' (*The Metro*)¹⁷¹

All brands clearly stand to benefit from the social acceptance of 'vaping', but products still need to be differentiated from others on the market and offer a unique selling point to maximise returns. By comparing e-cigarette brands, Figure 16 from the trade press does just that:

Figure 16: Product positioning

ones to watch...



Full of flavours
The FTA group's Matchless e-cig brand has recently been made available in two new flavours. Cherry and vanilla now join Matchless Red for full nicotine strength (24mg) tobacco flavour; Blue, medium nicotine strength (18mg) tobacco flavour; Mint, low nicotine strength (12mg) tobacco flavour; and Zero, which contains no nicotine.
rrp: £5.49
tel: 01527 557825



Keep Karma
Fosters Distributors' eKARMA e-cig is now available to independents. There are three variants – regular, light and menthol. The disposable e-cigs feature a separate battery compartment to isolate the vapour from potential contamination. The company claims that each e-cig gives the user an equivalent of more than 40 traditional cigarettes.
rrp: £4.99.
tel: 0161 246 6066



As seen on TV
E-cig manufacturer E-Lites became one of the first to launch a national TV advertising campaign earlier this year. The campaign featured Waterloo Road actor Mark Benton, who played the role of a father who misses his baby's first steps because he went outside to smoke a cigarette. The brand offers a variety of rechargeable variants including instant use e-cigs, rrp £6.99.
tel: 0800 112 3401



Intelligent thinking
Intelligig boasts a range of disposable and rechargeable e-cig products along with the support of a dedicated team. The brand's Intelligig Disposable e-cig claims to offer smokers up to 350 inhalations. Intelligig also manufactures its own liquid solution, ECOpure, in a UK laboratory located within the bioscience facility at the University of Manchester.
tel: 08000 337 935

Source: Convenience Store (2013)¹⁷²

4.1.6 Summary

It is evident that the independent e-cigarette company aiming its product at committed smokers markets a safe nicotine product, which is advocated as the healthier alternative to smoking. It is being promoted as a cessation aid to help smokers cut down on the number of traditional cigarettes smoked and/or it may be used in combination with cigarettes, which is particularly useful in places where the smoking ban is enforced as the products can be used anywhere. An additional benefit, according to marketers, is the harmless vapour so second-hand smoke is no longer a problem. Smokers are offered a cleaner product that tastes just like real tobacco, but without the smell.

It comes at an affordable price – cheaper than cigarettes – and discounts are offered for starter kits so new consumers can start using e-cigarettes without spending an extortionate amount on a product they are unfamiliar with. They can also buy their favourite e-cigarette brand anywhere – especially at newsagents and retailers stocking cigarettes – so they can buy electronic rather than traditional cigarettes. POS displays remind consumers of this smoking alternative, which is also freely available online. Brand awareness is raised through promotion in the press, trade press, magazines, television, company websites, sponsorships, online promotions and social media.

All these marketing efforts culminate in the social acceptability of e-cigarette and nicotine use and the normalisation of vaping. This is a perfect pitch for hardened smokers, who are too addicted to nicotine and/or do not want to quit smoking.

4.2 Marketing strategy aimed at young social smokers or non-smokers

The marketing experts interviewed suggested that e-cigarette marketing strategies appear to be or should, from a business and marketing perspective, be aimed at the youth market:

'...if you encourage or market young people... with this product, then you've got a fantastic thing because basically you have got all these young people getting all the social benefits, all the cultural benefits without actually having to smoke dangerous products...'

'...smoking has such a massive audience, but there is still some young people starting so early and if they can get them...'

'...the word starter would suggest that this is for people who seem to be a younger audience and perhaps that is less about switching from existing cigarettes to perhaps to people who are thinking about taking up smoking. It is not positioned as start to stop smoking. To me it doesn't say that at the moment and it's positioning electronic cigarettes and the liquid that goes in them as a new market – to new consumers as opposed to an existing market... this certainly seems younger...'

'...I would be encouraging lots of young people to take up this product. If that did or didn't encourage them or not encourage them to try real cigarettes then it's almost like, again cynically, a one way bet, isn't it? Because if they move onto cigarettes then at some point they will want to stop and then they will come back to my safe product. I just think the relationship between the safe and the unsafe product is extremely close...'

'Young children, well teenagers...because they are a group, they adopt something and then they all start to adopt it and it becomes quite a trendy thing. If you can make it trendy with teens then you are going to get maybe a large following...'

'If I was guessing at a target group then maybe twelve year olds right...twelve, fourteen maybe...teenagers, younger teenagers, they are socially media aware you know the language there...teenagers use the word 'wicked'...all that kind of reference to apps and connected rewards...and to have 'a friend' that is a social media thing...[see Figure 17].'

'...I would start targeting young people with it, look cool and interesting without the danger...'

Source: Digital Marketing Expert interviews

Figure 17: Advertising for Totally Wicked brand



Source: Totally Wicked website (2013)¹⁷³

As this target group is likely to be engaged with social media, findings from the social media audit are included in this section along with those from the traditional print audit.

4.2.1 Product

i) Cosmetic appeal

Some e-cigarette brands are being promoted as stylish lifestyle products and must have accessories. Nicotine-free alternatives are on offer, and e-cigarettes are available in various colours and flavours. 5 Colors, for example, offers a variety of coloured e-cigarettes, 'a disposable electronic cigarette containing no nicotine' and 'comes in a choice of five fruit flavours: apple, blueberry, grape, peach and strawberry.'¹⁷⁴

Figure 18: E-cigarette brand '5 Colors'



Source: www.5colours.co.uk¹⁷⁵

Colour is also a distinguishing feature for Vapestick, which offers a preferred, coloured 'outershell... so that the aesthetics are maintained' (Vapestick Facebook page) and Totally Wicked's Facebook page asks users: 'What's your colour of choice? Tornado eGo-C 650mAh Batteries available now in 8 Totally Wicked colours' (Totally Wicked Facebook page)

Other Totally Wicked E-Liquid Facebook posts refer to the product's attractiveness and accompanying accessories:

'The VariVolt Storm was designed to complement perfectly the VariVolt VV device. With a colour matched anodized body and sleek design it makes your VariVolt VV look stunning. The atomizer unit inner requires a syringe (included) or needle nosed bottle to fill. It generates a storm in the vapour department, producing a slightly warm and very rich hit. Choose your colour and kick up a storm! This atomizer also looks equally at home on a Tornado battery, especially when used with the unique Pen clip accessory'.¹⁷⁸

'Matching atomizers to go with you Tornado eGo-C coloured battery!...What's your colour of choice? Tornado eGo-C 650mAh Batteries available now in 8 Totally Wicked colours' (Totally Wicked Facebook page)¹⁷⁹

Some marketing experts noted how these product features appear to be targeted towards women specifically (see right and below).

'... glamorous women, clubber types perhaps..."If you are going to smoke, this is the fashionable one to smoke"... [and the] black and white film poster style [see Figure 19] – I suppose that reflects back to that glamour era of the fifties when it was socially acceptable to promote smoking in that type of way. I suppose that is perhaps people who are more influenced and understand the classic period that that came from, so less fashion focused and more aware of the glamour and the attractiveness of that era as well...'

(Marketing Expert)

'...because...of the kind of coolness... the kind of "image aspects"...it's the same reasons why tobacco companies would target women... very specific demographic, very specific set of psychological, social needs, which can be replaced by a smoking product in that way...'

(Marketing Expert)

Figure 19: advertisement of VIP brand



Source: VIP website¹⁸⁰

Vapestick has also created an 'Electronic Cigarette Wars Game', a retro style computer game hosted on the company's website, which allows consumers to have 'a bit of nostalgic fun' (Vapestick Facebook page).¹⁸¹

In an interview, one marketing expert explained how digital marketing is all about interactive engagement with consumers (see below).

'...there is the opportunity on social media...in identifying advocates and getting them on board and getting them to tweet and getting them to talk about their experiences. The positive effect that can have – it's that little story of the pebble in the pond and the ripple effect that can have. So we would use Twitter, Tumbler, Facebook, Instagram – anything that felt right at the time. Maybe bits of video, so maybe looking at Vine in a creative way. I'm loving a bit of Vine action right now. You have only got six seconds [to make a video]....so you could use your Vine video competition – "six seconds of things that you didn't miss, because..."...you could have a lot of fun with that cos you have to be really creative ...there is opportunity with augmented reality too.'

(Marketing Expert)

The Facebook pages for the brands monitored featured pictures of consumers posing stylishly and seductively with e-cigarettes in hand (Vapestick) with captions such as 'MAX-imum style' (referring to Vapestick Max product) (Vapestick Facebook page),¹⁸² 'Vapestick glamour – something for everyone!' (Vapestick Facebook page)¹⁸³ and blog entries on '10 ways to look cooler while vaping an e-cigarette' (Vapestick Facebook page).¹⁸⁴

In an interview, one marketing expert suggested that promoting e-cigarettes to young people as 'cool' products could make them more interested in smoking (see below).



'...if you market towards young people with this particular product, I would surmise there is a danger that you are basically normalising all the social stuff around smoking in a way that might actually encourage people to then get the real McCoy, to get the real thing and to get the real product and that you very quickly get you know what's cool about smoking a safe product?...The dangerous thing is what makes it cooler, it makes it more interesting...'

(Marketing Expert)

Innovative e-cigarette packs are also being marketed:

'We'd like to announce the first of our new product videos to our friends and customers! Watch the tutorial for the Vapouriz Gemini Pro (Portable Charging Case). This innovative pack uses the latest in "push" charging (rather than the old screw-in method), and the pack itself has an internal 1250mAh battery, meaning it can charge 6-7 individual batteries before needing to be recharged itself' (Vapouriz Facebook page)¹⁸⁵

One pack promotes dual use of e-cigarettes and traditional cigarettes by selling both products simultaneously:

NJOY's 'smart plastic case' has been 'designed to fit snugly in the pocket, protect the e-cig, and even house one regular tobacco cigarette for those adult smokers who chose to dual between the two' (Convenience Store)¹⁸⁶

In an interview, a marketing expert explained how an e-cigarette pack that resembles a traditional cigarette pack may be used as a marketing tool (see below).

'...there is a special thing about that kind of, as you unwrap it...there is a moment when you do that [act of tearing of the plastic wrapper on a pack] which is quite a good thing. And that is all there... so you are not missing out on that...you are just constantly reminding people how good that is...'

(Marketing Expert)

ii) Flavour

There were 93 references^{hh} (10% of the independent dataset) to flavours in the audit, and several independent e-cigarette brands are marketing these variations:

'No - there is no nicotine or anything in the flavoured ones. Just yummy taste of strawberry.' (Vapestick Twitter post)¹⁸⁷

'What flavour E-liquid is bubbling away in your Tank Electronic-Cigarette today?' (Vapouriz Twitter post)¹⁸⁸

'Mister Smoke is backed by the Chinese company Sweet Cigs...The company also offers a choice of 200 flavours ranging from beer, to banana - or even just tobacco' (Ripley & Heanor News)¹⁸⁹

'SKYCIG provides a range of flavours to suit everyone's tastes, including Crown Vanilla, Crown Cherry, Crown Menthol, Cinnamon, Tobacco Gold, Classic Tobacco and Crown Tobacco' (SkyCig advert)¹⁹⁰

'For the winter season, SKYCIG has released a limited edition Winter Variant pack, containing Crown Tobacco, Crown Menthol and winter flavour, Cinnamon; an ideal stocking filler for someone special who is looking for an innovative smoking alternative this Christmas' (SkyCig advert)¹⁹¹

'There will be video tutorials and a dedicated e liquid page where users will be able to browse between 60 and 100 different flavours' (Vapouriz Facebook page)¹⁹²

Figure 20: E-cigarette brands in social media audit – flavour variations

Brand	Flavour 1	Flavour 2	Flavour 3	Flavour 4	Flavour 5	Flavour 6	Flavour 7
E-lites	Regular	Light	Menthol	Regular	Regular	Regular	Regular
Nicolites	Traditional	Menthol	Cherry	Traditional	Traditional	Traditional	Traditional
Sky Cig	Classic Tobacco	Tobacco Gold	Crown Tobacco	Classic Menthol	Classic Vanilla	Classic Cherry	Cinnamon
Totally Wicked /e-Liquid concentrate							
Vapestick –cigs	Tobacco	Menthol	Apple	Cherry	Vanilla		
Vapestick – Shisha & cartomisers	Blueberry	Apple	Grape	Strawberry	Peach		
Vapouriz – cigs & cartomisers	Classic Tobacco	Menthol Fresh					
Vapouriz – e-Liquid	Tobacco Sampler: Classic Tobacco, HS Pure Tobacco, USA Gold, Smooth Virginia, Desert Ship	Mint Sampler Menthol Fresh, Mint Perppermint, Minty Bubblegum, Mojito	Fruit Sampler 1: Strawberry, Apple, Grape, Wild Cherry and Fruit Punch	Fruit Sampler 2: Mango, Blueberry, Lemonade, Orange, Rasperry			
VIP – cigs	Tobacco Strong or Regular	Menthol Srtong or Regular	BH Gold Strong or Regular	Virginia S trong or Regular			
VIP – e-Liquids	USA Tobacco	Virginia Rolling	BH Gold	Triple Menthol	RY4 Extra Smooth		
VIP – cartomisers	Apple	Cheery	Coffee	Strawberry	Vanilla		

Some schools have banned e-cigarettes citing concerns that they 'come in a variety of flavours' and that 'there are no age restrictions on buying them' (The Argus). In a news report, a fourteen year old student said:

'Everyone thinks it's rebellious to smoke but it's the soft version of that, the one without any bad side effects...I know some people who have done it in class but haven't been caught because you can just waft away the vapour so no one knows' (The Argus)¹⁹⁴

Skycig has gone one step further and shared its brand with an energy drink company:

'It's here! NRG by SKYCIG has arrived...Go to: www.SKYCIG.co.uk/NRG now to get yours... SKYCIGNRG takes e-cigs to a whole new level: 100% nicotine FREE... Contains active ingredient taurine... Exclusive black lightning design with electric yellow tip' (SkyCig Facebook page)

One marketing expert suggested that, if possible, it would make marketing sense to link e-cigarettes brands to alcohol companies (see right).

'You have got to be careful, especially with alcohol advertising as well, but it would be worth exploring creatively. That could potentially manifest itself. There is drinking responsibly and there is smoking responsibly, so there might be some sort of connection there that you could play on. Just people being together and sitting drinking together. It all comes back again to social...'

(Marketing Expert)

iii) e-Shisha

Smoking shisha pens has been described as 'one of the trendiest new activities among the hip fashionable young crowd in the UK' – 'a hot new alternative for smokers who still want to indulge in the trendy pastime while staying healthy and still looking cool' (B London, Daily Mail)¹⁹⁶. The disposable e-cigarette does not contain nicotine, but replicates the act of smoking (B London, Daily Mail; Vapelux website)^{197 198}

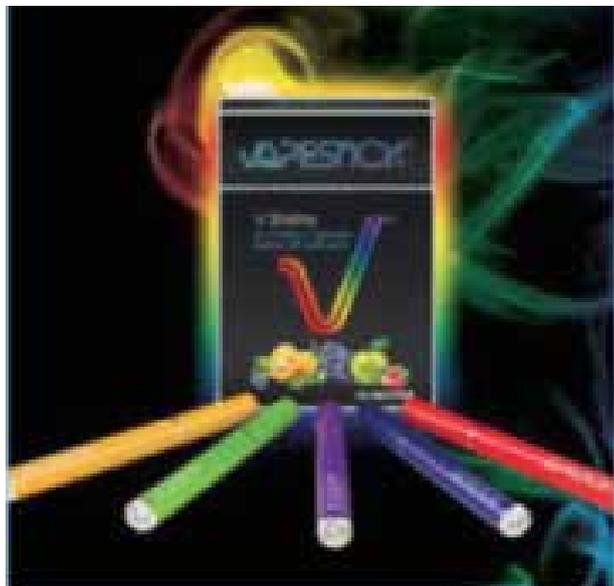
Vapelux Ltd, a company producing the product which comes in 'fresh bright colours', has 'a signature diamond tip' and is available in various flavours such as apple, grape, strawberry, peach and blueberry, promotes it as 'the finest and ultimate smoking experience without any of the harmful toxins' and the 'healthier alternative to smoking' (Vapelux website)¹⁹⁹

Variations of shisha are also promoted on Vapestick's Facebook page:

'V-Shisha – fruit cocktail 5-pack! (nicotine-free)' (Vapestick Facebook page)²⁰⁰

'V-Shisha sunshine promo!! Save 20% (£5.00) off our 5-pack of 0% nicotine, fruity and sparkly disposables' (Vapestick Facebook page)²⁰¹

Figure 21: Vapestick V-Shisha – fruit cocktail 5-pack – as advertised on company's Facebook page



Source: Vapestick (2013)²⁰²

In an article on 'smoke-free shisha' which features quotes from owners of a new shisha lounge, the product is depicted as a 'tobacco-free alternative... aiming to substitute a centuries-old tradition with a healthier option' (K Pickles, Edinburgh Evening News):

'This flavoured water vapour version is the latest healthier alternative designed to replicate the sociable custom minus the carcinogens and addictive nicotine... Sucking on the bubbling pipe is not a dissimilar sensation to smoking from a traditional hookah, but the flavoured fumes taste more like children's sweets than any sort of smoke substitute. Blueberry Mist, Cooling Mint and Pirates Cave, a citrus blend with mellowing mint, are the other options to choose from on the menu' (K Pickles, Edinburgh Evening News)²⁰⁴

Figure 22: Advertisements for flavoured e-shishaⁱⁱ



There are also press articles and pictures of celebrities using e-shisha or 'flashy fags' (see Figure 23).

Figure 23: E-shisha linked to celebrities in the news

Several newspapers reported on Girls Aloud using e-shisha when on tour:

'They were sharing "Shisha pipes, red wine, gossip" backstage at their gig in Manchester, and Kimberley Walsh (right) looks like she's really enjoying it. But don't worry, they're not going to damage their lungs midway through their string of gigs - these are electronic ciggies. "Electric shish with a diamond on the end," explains Cheryl Cole. Even their fags are flashy' (C Moodie et al, Daily Mirror)²⁰⁵

'POP babes Girls Aloud have been puffing on e-cigarettes to cope with the stress of their 10th anniversary tour. Sarah Harding, 31, caused a stir when she tweeted a snap of Kimberley Walsh enjoying a nicotine-free shisha stick... She deleted the photo when shocked followers thought Kim, 31, was smoking a joint...Fan Claire Cole tweeted: "Everyone is gonna wake up in the morning and be like OMFG KIMBERLEY SMOKES WEED." So Cheryl Cole, 29, tweeted a backstage pic of herself holding a blueberry-flavoured e-cig after a Manchester gig this week, writing: "Shisha pipes, red wine, gossip, #blueberry #peach #newafterpartyvibes #tentour". And Nicola Roberts, 27, took a photo of the packet' (M Jorsch, Daily Star)²⁰⁶



ⁱⁱThese photographs of poster adverts were taken in Glasgow. Moodie, C.[©]

4.2.2 Price

There are several examples of price being used as a marketing tool in the social media analysis. E-cigarette brands are evidently using price incentives and promotional discounts to attract more customers. In one instance, a 'vape for life referral scheme' is on offer (see below).

Figure 24: E-cigarette discounted offers on social media platforms

'5% off Cartridges: Use Code: 'NOTOBACCO5' (SkyCig Facebook page)²⁰⁷

'Totally Wicked Weekly Offer 20% off the full site!' (Totally Wicked Facebook page)²⁰⁸

'Win over £100 of Vapouriz #ecigs and #eliquid! To enter our mega giveaway simply tweet why you love @Vapouriz with the hash tag #ecigs!' (Vapouriz Facebook page)²⁰⁹

'Discount Vouchers' for online orders only '5% when spending £10 or more; 10 % when spending £40 or more; 12% when spending £100 or more' (VIP Facebook page)²¹⁰

'Totally Wicked Coupon Now Offering 7.5% Electronic Cigarette Discount On Mega Titan 510 Kits' (Totally Wicked Tumblr post)²¹¹

Totally Wicked @Mr_Wicked Good Morning. Today's discount code is Tweet9117 and will give you 11% off all non discounted items. Enter the code at the checkout (Totally Wicked Twitter post)²¹²

'Totally Wicked @Mr_Wicked Don't forget our Vape for Life Referral Scheme is still in action' (Totally Wicked Twitter post)²¹³

4.2.3 Promotion

i) Celebrities

Figure 25: Advertisements for UK e-cigarette brand

Some marketing experts explained that it may be useful for e-cigarette companies to promote the e-cigarette with 'stylish' celebrities, and drew comparisons with traditional cigarette advertisements (VIP website)²¹⁴ (see Figure 25).



'...she is very stylish looking, and all the rest of it... in that Kate Moss kind of way... so it's very contemporary...or it should be very contemporary, but to me that seems like something from 1976, because that's the kind of adverts for cigarettes that were around in 1976.'

(Marketing Expert)

In the press audit, there were 110 references (12% of the independent dataset) to celebrities using e-cigarettes and celebrity product endorsements were frequently posted on social media platforms and linked to specific brands.



'...Audrey Hepburn-esque – absolutely trying to draw on that sort of glamour era.'

Examples include:

'Hey Tamara [Ecclestone] - that looks just like a Vapestick grape V-Shisha!!' (Vapestick Facebook page)²¹⁵

'Congrats @TamEcclestone –looked like a GREAT party...and full of V-Shisha!' (Vapestick Twitter post)²¹⁶

Copy of Tweet on Facebook page from Ronnie Wood of Rolling Stones: 'Thanks to @Vapestick for sending me some supplies while I've been on tour!: -)' (Vapestick Twitter post)²¹⁷

'What's that Francine Lewis is holding?'' (Vapestick Facebook page)²¹⁸

Picture on Vapestick Facebook page with picture of Christina Milian as she 'puffs on e-cigarette at the beach' (Vapestick Facebook page)²¹⁹

E-Lites Facebook post featuring pictures of celebrities holding or using e-cigarettes in front of branded promotional banners: '[E-Lites] pounced on a photoshoot in Kensington, London, with some TV personalities showing up!' (E-Lites Facebook page)²²⁰

One tabloid reported that 'Cheryl Cole and her bandmates will soon be smoking top e-cigarettes 5 Colors, thanks to the Daily Star' after a reporter 'hand-delivered a shipment' of the e-cigarettes to the band before a gig. The article promoted product features including price and the company website:

'A single 5 Colors cigarette costs £6.99 and, according to the maker, provides the same number of puffs as 20 normal cigs, costing £7.46. They can be bought online at 5colors.co.uk.'²²¹

¹⁷This figure does not include references to celebrities on social media platforms.

Figure 26: Examples of celebrity e-cigarette use & promotion of e-cigarettes on television & film in the UK & US

Characters on television programmes in the UK such as *Eastenders* (YouTube.com)²²² and *Lewis* (Radio Times) are using e-cigarettes, and the products are being promoted through features in shows such as the *Alan Titchmarsh Show* (YouTube.com)²²⁴

Similarly in the US, Hollywood celebrities have demonstrated how they use e-cigarettes to help them quit on television talk shows: whilst being interviewed on *Live With David Letterman*, for example, Katherine Heigl 'smoked' a Smokestik live on-air claiming she was addicted to the product, but it 'wasn't bad for you', and encouraged Letterman to have a 'puff' (YouTube.com)²²⁵

Jonny Depp's character 'smokes' an e-cigarette in the feature film *The Tourist* (YouTube.com). Other Hollywood celebrities including Leonardo DiCaprio, Dennis Quaid and Kevin Connolly have also been pictured in the press 'smoking' e-cigarettes (Huffington Post) and company websites feature pictures of A-list celebrities who use their products (South Beach Smoke)²²⁸



ii) Online promotions

Unique online promotions are also offered by independent e-cigarette companies through social media platforms. Examples include Totally Wicked E-Liquid's 'picture Competition', where 'the picture with the most LIKES [on the Facebook page]...wins a "totally wicked" prize' (Totally Wicked Facebook page)²²⁹ and a 'bimonthly Zapsticker contest!' for E-Lites where 'with every online purchase you pick up a Zapsticker, and whoever can be most artistic, creative or wacky with their sticker will win an £80! [sic]' (E-Lites Facebook page).²³⁰

On the Nicolites Facebook page, consumers had the chance to download an app allowing them to buy disposables or cartomisers for rechargeable products (Nicolites Facebook page);²³¹ Vapestick advertised on its Facebook page that consumers could 'save 20% on all refill cartomisers by signing up for the 'regular deliveries' service' (Vapestick Facebook page);²³² and other brands are using 'deal-of-the-day websites' such as Groupon to promote their products at discounted rates.

Figure 27: Groupon discount voucher for e-cigarette brand (Groupon.co.uk)²³³

E-Cigarette Kit With Mains, USB Charger, Plus Refills from £19.95 Delivery (Up to 59% Off)

More Info!

**Amount:
from £19.95**

Discount 59%	You save £28.40
-------------------------	----------------------------

The image shows a Groupon discount voucher. At the top, the text reads 'E-Cigarette Kit With Mains, USB Charger, Plus Refills from £19.95 Delivery (Up to 59% Off)'. Below this is a green button with the text 'More Info!'. Underneath the button, the text says 'Amount: from £19.95'. At the bottom, there is a table with two columns: 'Discount 59%' and 'You save £28.40'. To the right of the table is a black and white photograph of a woman with her hair styled up, looking thoughtfully to the side.

Totally Wicked also promoted its product with a competition called 'Win with The Wicked One', where four contestants 'battle[d] it out for that fantastic prize of an all expenses paid trip for two around the Wicked World that includes the UK, Germany and the USA!' (Totally Wicked website)²³⁴

iii) Sponsorship

Sponsorship deals for various sports (including football, motor racing, golf, powerboat and superbike racing) emerged as prominent promotional strategies. There were 34 references (4% of the independent dataset) to sponsorships in the traditional media audit^{kk}, which raised awareness of specific brands.

This article highlighted an e-cigarette company partnering with a motorsport that was once 'synonymous with tobacco sponsorship' (an image for a competitor's sponsorship deal with Tom Ingram is embedded in the text) (SkyCig website)²³⁵

^{kk} This excludes references to sponsorships on social media platforms.

'The E-Lites sponsorship package will include trackside and event branding as well as a range of other on-site rights and hospitality such as a dedicated section on the MCE BSB championship website for fans to upload their E-Lites race highlights. The distinctive red and white E-Lites branding will be displayed prominently at all races throughout 2013 and will be reminiscent of the iconic branding which was famously associated with motorsport throughout the 1980s. Commenting on the partnership E-Lites' CEO, Adrian Everett, said: "We are delighted to be associated with the MCE British Superbike Championship and that E-Lites, as the nation's favourite e-cig brand, is trail blazing for the category. "Partnering with a sport that was once synonymous with tobacco sponsorship is our way of raising awareness that smoking has been reinvented and that E-Lites provide an alternative that is widely regarded as being safer than cigarettes' (TalkingRetail.com)²³⁶



Figure 28: Examples of sponsorship promotions on e-cigarette companies' social media platforms

'[Nicolites] proudly sponsoring Woking FC. We are also supporting Woking Hospice, with their logo featuring on youth team and junior replica shirts for 2013/14' (Nicolites Facebook page)²³⁷

'We [Nicolites] are happy and excited to say we are now the principle partners for Birmingham City Football Club. As a Birmingham-based company we are proud to be able to support Birmingham City FC as the club and fans look forward to a successful season both on and off the pitch' (Nicolites Facebook page)²³⁸

'Our SKYCIG Ginette G55 is back and ready for action this weekend in the Ginetta GT Supercup at Oulton Park after a five week break. Tom Ingram returns to the track where he swept the board with victories in 2012' (SkyCig Facebook page)²³⁹

'E-Lites are proud to lend him [golfer Alex Fuell, who turned professional] our support to help him to bigger and better tournaments' [with YouTube video of him] (E-Lites Facebook page)²⁴⁰

'Team E-Lites Powerboat in Canary Wharf: 'Our boat is sitting in Canary Wharf [for the Venture Offshore Cup] and our Team E-Lites girls are handing out samples again!... Also, if you're in Canary Wharf and you need chargers or more tips, you can buy a full range of E-Lites goods at the News of the Wharf outlets' (E-Lites Facebook page)²⁴¹

'We've been at a retail show in EventCity, Manchester today, and popping in to help out was our Formula 4 driver Matt Bell! The crowd loved the car, and Matt can't wait to get the E-Lites machine racing again at Oulton Park this coming weekend' [picture of driver on the car on Facebook] (E-Lites Facebook page)²⁴²

'Totally Wicked E-liquid are the proud sponsors of the Bob Lord Stand at Turf Moor, home of Burnley Football Club. We have a very friendly and helpful team, who will always be happy to assist and advise you on all things e-cigs related. Come and see us for an obligation free trial...' (Totally Wicked Facebook page)²⁴³

'A somewhat busy week here at E-Lites but nothing will stop us cheering on our racers this weekend! Our Formula 4 driver Matt Bell is racing in Snetterton, Norfolk, and Tim Hastings is racing Superbikes Knockhill, Fife' (E-Lites Facebook page)²⁴⁴

'Our cars, bikes and now our boats are all winning trophies! Congratulations to the Team E-Lites Powerboat Crew...who picked up third overall and first of the 'big boats' at the weekend!' (E-Lites Facebook page)²⁴⁵

These sponsorships were also frequently mentioned on social media platforms along with photographs of the sponsored sportsperson and updates of their performances (see Figure 28). Free e-cigarette samples were distributed at some of these events.

4.2.4 Place

As previously noted, e-cigarettes are being sold and marketed at exclusive and trendy events and venues, as well as on company websites, social media platforms and through other online sources such as Groupon.

E-Lites also set up a promotional stall for consumers, who were on their way to a music festival, and posted this message on their Facebook page:

'Are you heading south to Glastonbury today? Stop off at Strensham South Services off the M5 to sample our E-Lites! We'll be there for the next few hours!'(E-Lites Facebook page)²⁴⁶

One marketing expert explained that this a marketing technique used to 'tap in to the values, the attitudes and the behaviours of the target market and reflect them as values and attitudes and behaviours of the brand':

'...without contravening the law itself, you can tap into either the values of the people that you are trying to talk to, the attitudes, the things that they are interested in and that resonate with them... like humour, popular culture... so you don't have to feature the product or you don't have to talk about cigarettes directly to get over the values of the brand and the benefits I guess, without talking explicitly about what the benefits are...'

(Marketing Expert)

Another marketing expert also commented on the 'social aspect' of e-cigarette promotion (see right).

Independent e-cigarette companies are also selling their products in their own branded retail stores, which offer special rates for devoted shoppers:

'Ask in store about our loyalty card scheme. Totally Wicked Wigan: Plenty of advice available and samples to try in store!' (Totally Wicked Twitter post)²⁴⁷

There is also evidence of products being sold in specialist e-cigarette stores or vaping e-lounges on the high street (S Begum, Manchester Evening News)²⁴⁸

4.2.5 Positioning

Independent e-cigarette companies are promoting products that are not only socially acceptable, but socially superior. There is evidence of a new culture emerging, where e-cigarettes are used, received and promoted as lifestyle products and the market is expanding at a rapid pace. In just over one year, there were 121 product trademark applications and 12 emerged in the two weeks following the MHRA announcement. Four of these were made by the tobacco company, Imperial Tobacco; the remainder by independent e-cigarette/e-shisha companies (see Appendix 1).

E-cigarette brands have noted how 'the world's going crazy for e-cigarettes' (Vapestick Facebook page); and the Nicolites Facebook page reports 'As E-cigarettes have become increasingly popular, a bizarre new sub-culture has been formed – the 'vapers... people who have no intention of quitting but instead believe their addiction can save millions of lives' (Nicolites Facebook page)²⁵⁰

Totally Wicked E-Liquid's Twitter feed mentions events such as 'Vapestock 2013 at Indian Rocks Beach, FL', which is a social gathering or convention for vapours (Totally Wicked Twitter post), and promotes 'Totally Wicked Vapers Lounge[s]' (Totally Wicked Facebook page)²⁵²

4.2.6 Summary

Independent e-cigarette companies appear to be actively targeting younger non-smokers or social smokers and promoting the e-cigarette as lifestyle products. Innovations like e-shisha and flavourings have emerged, and while the price is reassuringly expensive, discounts and price incentives are offered to ensure the product is accessible.

'...there may be similar opportunities to launch something like that [e-cigarette brand], as you would launch a new drinks brand, because you are appealing to the teenagers. You are appealing to the social – being outside, being with friends, enjoying company, enjoying life. You could then tie that in to...a launch and set up areas around the UK that you tie social media into. So it could be event based. You are talking about something that is potentially – people, who end up missing things like the end of gigs cos they have got to go out and have a fag. You are missing so much, but this is actually an opportunity... launch it with either an existing event that you partner up with or events around the UK. If that is the youthful target, looking at music, looking at style and fashion and tying it into those other behaviours and things that that audience gets up to socially and start to see how we can exploit and piggy back on the back of some of those events...

(Marketing Expert)

²⁴⁷These trademark applications were made between 1st May 2012 and 26th June 2013 (see section 2.1.1 for data searches).

Promotions occur through celebrity endorsements and sponsorship deals and the product is sold at exclusive events, trendy venues, through various online sources and at product retail stores, which offer loyalty schemes for committed consumers to purchase this socially acceptable 'accessory'.

4.3 Marketing strategy aimed at stakeholders

This section presents marketing strategies by independent e-cigarette companies that are aimed at stakeholders. The target here is not the consumer, but other stakeholders from regulators to health bodies. A different product is therefore on offer.

4.3.1 Product

For this target group, e-cigarettes have been presented as a lifeline for hardened smokers and a public health gain. The concept of tobacco harm reduction (THR) has emerged as the 'product' on offer – a way for smokers, who are unwilling or unable to stop smoking tobacco, to consume nicotine without the toxins and carcinogens found in cigarettes.

No e-cigarette brand in the UK has gone through the pharmaceutical licensing process and been classed as a medicine and as such e-cigarettes are not included in NICE's guidance on THR, which refers to licensed nicotine containing products. There is evidence, however, of e-cigarette companies marketing their brands as harm reduction products following NICE's announcement. For example, Vapestick's Facebook page stated:

'NICE Recommends E-Cigarette for Smokers. NICE has become the first public institution to recommend the electronic cigarette for smokers who cannot quit' (Vapestick Facebook page)²⁵³

The same company's Facebook page featured an article that appeared in a tabloid stating: 'E-cigs 'are the safer option' (Vapestick Facebook page). Furthermore, following the publication of NICE's draft guidance on HR, 'electronic cigarettes were declared safe to use' (Evening Standard) in the media (even though the guidance refers to licensed rather than unlicensed NCPs). It was also reported that e-cigarettes had been 'given [a] green light to help users quit smoking' (Evening Standard).²⁵⁶

Vapestick's Facebook page featured a blog on 'The Nicotine E-Cigarette Quandary', where it was noted that 'in 2011, the UK Governments' Behavioural Insights Team or 'Nudge Unit' publicly endorsed the use of electronic cigarettes for harm reduction' (Vapestick Facebook page).²⁵⁷

4.3.2 Price and Promotion

The product of harm reduction is reported as priceless: e-cigarette companies are suggesting that lives can be saved if the approach is adopted. Furthermore, government officials and health regulators are reminded that ignoring this offer comes at a price – indeed it would be negligent to do so.

Stakeholder marketing efforts have been directed at politicians, health bodies, public health experts and

charities. From the press and social media audit, it is apparent that independent e-cigarette companies frequently engage with the media to offer views on developments in public health policy, such as the regulation of e-cigarettes as pharmaceutical products. Brand awareness is raised through these media opportunities.

In the lead up to the MHRA's announcement, for example, E-Lites posted on its Facebook page that its CEO was 'very busy' on BBC News, ITV news and Sky news (E-Lites Facebook page).²⁵⁸ Similarly, an Interview with the co-founder and Chairman of Vapestick was broadcast on BBC News, which was posted on the company's Facebook page (Vapestick Facebook page)²⁵⁹ along with interviews for BBC Radio 5 live and BBC Radio Wales (Vapestick Facebook page).²⁶⁰

There were several references to specific e-cigarette brands in the press and some of these stories were sourced from press releases, which were specifically aimed at politicians.

For example, a story sent through the Press Association news wire had the headline: 'Electronic Cigarette Users Called to Save e-Cigs and Lives Along With Them'. The readymade news story, which included quotes from the e-cigarette company's Operations Manager and a link to the brand's website, was about 'SKYCIG's 'write to your MEP' campaign' – an attempt to encourage e-cigarette users to 'form a united voice on the EU Tobacco Products Directive':

'By simply accessing SKYCIG's dedicated 'write to your MEP' webpage, which can be found at <http://www.skycig.co.uk/ecita>, and writing a short letter expressing their concern about the new directive, users will be able to submit their opinion on the issue to their local Member of the European Parliament. SKYCIG will collate every letter submitted and send them directly to the local MEP of each consumer, thereby giving the UK's electronic cigarette users a single, strong voice over the issue of regulation, without needing to take time out to fit in with MEP surgery hours or to write and post a letter' (PR Newswire Europe)²⁶¹

Totally Wicked used its Facebook page to attract users for a similar campaign, which would culminate in a letter being sent to the Chairman of the European Parliament's Environment, Public Health, and Food Safety Committee:

'CALL TO ACTION – WE ARE ALMOST AT 100 SIGNATURES. PLEASE COPY AND PASTE THE EMAIL BELOW AND SEND TO THE EMAIL ADDRESS AT THE BOTTOM OF THE POST. (If you have already done so, please share with family and friends, we need as many signatures as possible)...Millions of lives depend on MEPs doing the right thing when revising the Tobacco Products Directive... As users of e-cigarettes, we urge members of your committee to reject Article 18 of the Commission's proposal. We believe it is poorly thought through, contains an arbitrary and pointless threshold, takes an easy short cut by applying medicines regulation rather than designing appropriate regulation, and has been prepared without proper consultation of the industry and users like us...'
(Totally Wicked Facebook page)²⁶²

Totally Wicked also posted 'a 5-page letter and a Tornado Tank e-cig' to 'EVERY SINGLE MEP' explaining why Article 18 of the TPD needs to be dropped:

'We want to keep the pressure on MEP's [sic], rope those that know nothing about the TPD and electronic cigarettes into the discussion and by placing an e-cig into the hands of each MEP; at least they can then say they have seen one! We will be following up this massive mail shot up with telephone calls, meetings and MEP visits to our company...' (Totally Wicked Facebook page)²⁶³

The e-cigarette brand, Totally Wicked, also engaged with other politicians and kept its consumers informed by posting regular updates on social media platforms. A YouTube video of 'Chris Davies MEP visiting Totally Wicked HQ' was posted on its Facebook page (Totally Wicked Facebook page) along with a post about a local MEP who 'is standing up for e-cigarette users by fighting plans hatched in the EU' (Totally Wicked Facebook page).²⁶⁵

Additional comments about the e-cigarette company's engagement with politicians include:

'As we all may know, Labour are the party pushing hard in relation to the medical regulations on e-cigs in the EU, well today we have Labour MP Jack Straw visiting our Head Office. We are keen to know your thoughts and feelings, what would you ask him?' (Totally Wicked Facebook page)²⁶⁶

'The North-West Lib Dem MEP Chris Davies is visiting Totally Wicked HQ tomorrow. As vapers, what questions would you ask him? What are you thinking? What are your fears for the future of electronic cigarettes?' (Totally Wicked Facebook page)²⁶⁷

During the visit to Totally Wicked, MEP Chris Davies made an announcement to the press stating that 'tens of thousands of people will die every year if new legislation is passed re-classifying e-cigarettes as medicines' (Lancashire Telegraph)²⁶⁸ – a view which was echoed by the company's director who said: '700,000 people are dying in the European Union every year through cigarettes' (Lancashire Telegraph).²⁶⁹

The news story was generated by press release through the newswires (Figure 29).

Figure 29: Press release generating a news story about an e-cigarette brand²⁷⁰

June 21, 2013 Friday 10:20 AM EST

Chris Davies MEP Pledges to Continue his Fight Against New Controls to Restrict the Availability and Strength of e-Cigarettes

LENGTH: 805 words

DATELINE: BLACKBURN, England, June 21, 2013

Members of the European Parliament are currently debating proposals from the European Commission to revise the existing Tobacco Products Directive (TPD). As these discussions reach a crucial stage, Chris Davies MEP, a leading member of the European Parliament's Environment, Public Health and Food Safety (ENVI) Committee, the committee responsible for this matter, visited Totally Wicked Ltd, a Blackburn based manufacturer of electronic cigarettes.

In June 2013, it was noted that Totally Wicked's Managing Director had agreed to step down 'after inappropriate emails' had been sent to Ms Linda McAvan MEP, lead Rapporteur of the EU ENVI committee and Mr Jeremy Mean of the MHRA, in which he 'called in to question the legitimacy and motivations of both these two individuals and the organisations that they represent' (Totally Wicked Facebook page).²⁷¹

E-Lites also engaged with politicians by asking Bromsgrove's MP, Conservative Sajid Javid, to officially open the company's new headquarters in Bromsgrove. In press reports, the MP welcomed the 'tremendous boost for the local economy' and the company's co-founder and director used the opportunity to market the product:

'We've seen an extraordinary increase in sales of our highly advanced smoke-free and tobacco-free electronic cigarettes, which offer smokers a healthier, cheaper and unrestricted alternative to conventional cigarettes' (Kidderminster Shuttle)²⁷²

Independent e-cigarette companies are also aligning themselves with public health experts, charities and health bodies. For example, E-Lites posted a promotional YouTube video of a celebrity doctor endorsing the brand on 'World No Tobacco Day' (YouTube.com).²⁷³

On the Nicolites Facebook page, the brand states that it is 'proud to say the charity Action Smoking & Health [ASH (London)] have supported us in our partnership [sponsorship deal with Birmingham FC]' (Nicolites Facebook page)²⁷⁴, and the 'Vegas Vapefest September 20-21, 2013 – Electronic Cigarette Seminar and Expo' quotes ASH (London)'s statement on a harm reduction approach to tobacco (VapersClub.com).²⁷⁵

In the press and social media audit, there were several mentions of Totally Wicked sponsoring a free evening public lecture on e-cigarettes with refreshments at a university to 'explain what they are, how they work, whether they help people stop smoking and whether they are safe'(University of East London; Newham Recorder).^{276 277 278} The lecture was presented by an academic, who conducted a survey to 'characterise e-cigarette use, users, and effects, in a sample of Electronic Cigarette Company (TECC) and Totally Wicked E-Liquid users' (Nursing Times).²⁷⁹ A peer-reviewed paper was subsequently published (Dawkins L et al, 2013),²⁸⁰ which is cited on Totally Wicked's website (Totally Wicked website)²⁸¹. It states that no funding was received for the study and the first author has 'a collaborative relationship' with TECC and TWEL, who supplied the e-cigarettes and cartridges (Lawson V et al, 2013).²⁸²

E-cigarettes were also promoted during National Heart Month, where the British Heart Foundation representative was quoted:

'Try using nicotine replacement products like e-cigarettes to gradually reduce the number of cigarettes you smoke, until you're really prepared to give up completely. You've probably got a better chance with nicotine replacement than you have going cold turkey'
(L Salmon, Kidderminster Shuttle)²⁸³

An additional report in the press suggested that the UK Centre for Tobacco Control Studies had 'endorsed' e-cigarettes:

'There are more than 10 million tobacco smokers and 600,000 regular e-cigarette smokers in the UK. Virtual e-cigarettes have been endorsed by The UK Centre for Tobacco Control Studies. A spokesman said: "Some smokers find it very difficult to quit, despite a lot of effort.'
(Cambridgeshire Times)²⁸⁴

E-cigarettes were also linked to the NHS Stoptober campaign, which encouraged smokers to quit for a month.

One e-cigarette store, which appeared on Channel 4 news when it opened a local branch, was featured in a news article on Stoptober. The shop recruited 87 new customers on top of normal monthly growth and the managing director was quoted:

'We give customers the option to try different flavours, we work out the strength which meets their current intake of nicotine, and then we work on a programme where we reduce the nicotine as it suits them.' (Rugby Advertiser)²⁸⁵

In a separate article on the initiative, which also featured a quote from Cancer Research UK about the dangers of smoking, 'puffing on electronic cigarettes' was reported as one of the 'different ways people can try to quit smoking.' (L Ehren, Cambridge Evening News).

Stoptober is also mentioned in an advert for a shop selling a branded e-cigarette at a discounted price:

'This month is nationally known as STOPOBER so we are doing a new promotion on the vapsticks [sic] cigarettes which are now available in store at promotional price of £7.99 as an alternative to smoking so if you are going to give up this is the month to do it'. (Gloucestershire Echo)²⁸⁷

4.3.3 Place

Where e-cigarettes will be available in the future depends on whether e-cigarette companies operate in a regulated or unregulated space. It is clear from the press and social media audit that independent e-cigarette companies are divided in their approaches to regulation – some are in favour of the product being regulated as a medicine, which will allow them to make smoking cessation claims; others advocate that e-cigarette regulation is an unnecessary burden.

Both perspectives were strongly advocated by e-cigarette brands in the press and through social media platforms. E-cigarette companies sought to influence opinions accordingly – either proactively, by arguing against impending announcements on regulation; or reactively, by asserting viewpoints in the public domain following these announcements.

For example, Vapestick published the following posts on its Facebook page: 'MHRA Announcement: Don't believe the Hype' (Vapestock Facebook page)²⁸⁸ and 'E-Cigarettes Want Your Attention Now (Before the FDA [the American health regulator] Steps In)' (Vapestick Facebook page).²⁸⁹ Totally Wicked asked on Facebook: 'Why does the MHRA want to prevent or obstruct a smoker having access to products...?' (Totally Wicked Facebook page)²⁹⁰, and after the regulator's announcement posted:

'As Douglas Adams said – Don't Panic! Wednesday's decision by the MHRA was not a complete shock. However, we had hoped, but unfortunately with little confidence, that sense would prevail... Copy and Paste, and then send it all back to us!...Now that we have posted 754 MEPs an e-cig and a few notes on why e-cigs should not be in the Tobacco Products Directive, the next thing we are doing is organising a hand delivered letter to Mathias Groote, the Chairman of the ENVI committee' (Totally Wicked Facebook page)²⁹¹

VIP made a similar declaration on its Facebook page:

'SAVE E-CIGARETTES AND YOUR FREEDOM OF CHOICE! Please share, like, re-post, or tweet this message... SAVE E-CIGARETTES AND SAY NO TO THE EU... fightvapingban.com' (VIP Facebook page)²⁹²

The same e-cigarette brand referenced a survey conducted by ASH (London) to petition against proposed changes in the European Commission's TPD. In a tweet on 'the E-Cig Ban Threat & Why "Youth Health" Is A Red Herring', VIP said:

'The concerns raised by some individuals, politicians and anti-smoking groups about electronic cigarettes have taken many different forms over the last few years since their introduction, with one argument being used in favour of the proposed EU 'ban' on the devices being related to use amongst children.... but there's no suggestion across the board of significant usage amongst under 18s, as the group for Action on Smoking and Health revealed just weeks ago....ASH Survey Finds Under-18 E-Cig Use 'Extremely Rare'...' (VIP Twitter post)²⁹³

Competitor Skycig posted words of encouragement on its Facebook page along with a visual with the words 'Keep calm and vape on':

'In light of the announcement today by the MHRA we wanted to reassure our customers that there will be no immediate change to SKYCIG products or services' (SkyCig Facebook page)²⁹⁴

Nicolites, on the other hand, was in favour of regulation:

'E-cigarettes will be licensed as a medicine in the UK from 2016 under new regulations announced yesterday (June 12). Nicolites managing director... said: 'This is a good decision by the MHRA and, as a responsible company, we of course welcome the move to license e-cigarette products' (Nicolites Facebook page)²⁹⁵

'...in the news recently other ecig companies have decided to go against the recent decision for e-cigarettes to be classified as medicine. We welcome this decision. What are your thoughts?' (Nicolites Facebook page).²⁹⁶

The e-cigarette brand has thus positioned itself differently on the market.

4.3.4 Positioning

It is evident that independent e-cigarette companies are distancing their products from tobacco products, and highlighting characteristics that differentiate e-cigarettes from traditional cigarettes to help establish them as a socially acceptable alternative to smoking.

In the press and social media audit, it became apparent that the light at the end of the e-cigarette is used by some independent e-cigarette companies for brand positioning:

'Why do some E-Lites have a green LED? We designed the E60 and Exec in this way so that it will not be confused with an 'ordinary' cigarette in a public place – and because it looks pretty cool too!' (E-Lites Tumblr post)²⁹⁷

Skycig's signature blue tip is similarly noted as a characteristic that allows its product to be used in places where the smoking ban is enforced:

'We sell a blue-tipped battery so it looks like a cigarette from a distance but the blue light allays any fears that people are smoking inside...It's a cosmetic thing, and our customers want the physical feel of smoking. The light's an important part of that. I don't see why we should have to hide it away' (G Mackie, Scotland on Sunday)²⁹⁸

E-cigarettes are also being positioned as delivery mechanisms for a safe substance – a 'clean source' (P Taylor, Manchester Evening News)²⁹⁹ or 'safe form' (Western Daily Press)³⁰⁰ of nicotine, which has resulted in the normalisation and acceptance of nicotine use for those who cannot or will not quit smoking.

In the press and social media audit, nicotine use was unambiguously assented as safe and acceptable:

'... nicotine by itself is no more dangerous than caffeine' (D Henry, Manchester Evening News)³⁰¹

'Of all the chemicals that are in cigarettes, of which there are about 3,000, nicotine is one that is known to have a minimal effect on health. It speeds up the metabolism for a period of about 20 minutes, so the blood pressure goes up, the heart rate goes up slightly. But it's not thought to have any long term effects. That said it is the thing that keeps people smoking. I would say that a clean source of nicotine is very much less harmful than continuing smoking, but those in the know are not clear that electronic cigarettes are a clean source of nicotine' (P Taylor, Manchester Evening News)³⁰²

'Avoid going cold turkey. Most people will need to reduce their nicotine intake slowly, replacing cigarettes with a safe form of nicotine' (Western Daily Press)³⁰³

4.3.5 Summary

The stakeholder marketing strategy for independent e-cigarettes companies appear to have respectability and distance from tobacco as key objectives. The idea is for e-cigarettes to provide a public health solution for an addiction dirtied only by the toxins delivered along with the habit-forming, but 'harmless' nicotine found in combustible cigarettes.

Harm reduction is the priceless product presented to policymakers, which is ignored at their peril. As company objectives need to be aligned with those of health advocacy groups, experts and politicians, these are the stakeholders that are targeted in promotional campaigns to facilitate the marketing of e-cigarettes in a regulated or unregulated space.

Product positioning takes the form of reframed perceptions of nicotine use – the acceptance and normalisation of an addictive but safe substance. This is marketed as the perfect alternative for smokers, who are incapable of quitting without help, or simply refuse to quit.

5 Tobacco companies and e-cigarettes

The first major tobacco group to buy a British e-cigarette company was BAT, which owns a 42 per cent stake in RJ Reynolds. In December 2012, BAT acquired CN Creative, the maker of Intellicig (BAT plc). Kind Consumer, a healthcare company developing innovative inhalation technologies for the consumer and medical markets, was previously backed by BAT and sought a multi-million pound investment from private sponsors to research and develop cigarette substitutes for launch around 2015 (M Wembridge and C Thompson, Financial Times). Furthermore, the consumer healthcare company, Nicoventures Limited, which 'operates as a stand-alone business within the British American Tobacco Group', was also established to 'identify, develop and commercialise regulated nicotine products with real smoker-appeal' (Nicoventures website).³⁰⁶

Other leading tobacco companies have followed suit. The tobacco company, Lorillard, paid £90 million for the e-cigarette company Blu in 2012 (Drugfree.org);³⁰⁷ RJ Reynolds launched its own line of e-cigarettes called VUSE in 2013 (Vaperanks.com);³⁰⁸ Imperial Tobacco is working with Fontem Ventures to develop 'e-vapour cigarettes' (B Goh, Reuters);³⁰⁹ and Altria, the owner of Philip Morris and the Marlboro brand, is launching its new e-cigarette brand, (New York Daily News).³¹⁰

In an interview, a marketing expert explained why it makes sense for tobacco companies to be investing in the e-cigarette market (see below).

While independent e-cigarette companies have been marketing their products for the last few years, the promotion of tobacco industry owned e-cigarette brands is still in its infancy and comparatively little is known about the tobacco industry's e-cigarette business strategy. An audit of tobacco industry trade press, however, provides some insight into current strategies and future marketing developments.

This section presents marketing strategies by e-cigarette brands that are owned by tobacco companies.



'...I can absolutely understand the counterintuitive logic of cigarette companies getting into this. Because they understand the behavioural aspects so it's...a one way bet...so if everybody gives up smoking, but they still love the sociology of smoking and the psychology of smoking, but not the pharmacology...then you have established a completely new product line, you have established a completely new product. If it doesn't work, if people only use them as a temporary thing to get off smoking, then...you have unlocked the difficulty which is increasing throughout the western world, which is the visibility of the concept of smoking that has gone out of culture, gone out of most people's lives. And you have unlocked that and you have put that back in again. Even to the extent that you can show glamorous women and men with a cigarette in their hand looking cool and sexy...'

(Market Experts)

Figure 30: Tobacco owned e-cigarettes – the marketing strategy

Marketing challenge	Marketing strategy	
Who	Consumers	Stakeholders
Objective	Long-term sales of tobacco through 'next generation' product (especially in developed countries), profit-maximisation	Responsibility, legitimacy, credibility, access to policymakers/regulatory processes, public-private partnership, scientific proof
What	reduced harm product, safer alternative to cigarettes, used for pleasure, lifestyle products	harm reduction
How	<p>Product: safe nicotine, used anywhere, flavoured lifestyle products</p> <p>Price: financial – affordable psychological – safer and glamorous</p> <p>Promotion: where tobacco products cannot be advertised, lifestyle and celebrity</p> <p>Place: everywhere tobacco is available, company websites, point of sale displays</p> <p>Positioning: safer smoking alternative, necessity, capitalise on consumer's preferences</p>	<p>Product: harm reduction</p> <p>Price: financial – priceless, saving lives, psychological – it would be negligent to ignore this offering</p> <p>Promotion: health bodies/experts, charities, politicians, regulators</p> <p>Place: regulated space</p> <p>Positioning: differentiation from NRT products, reframe perceptions of nicotine use, alternative for those who can't or won't quit</p>

5.1 Marketing strategy aimed at consumers and stakeholders

5.1.1 Product

The product marketed by tobacco owned e-cigarette brands is harm reduction and the safe consumption of nicotine. BAT stated that it acquired CN Creative as a 'natural extension of its approach to tobacco harm reduction' (K Feddy, Manchester Evening News) and that while the promotion of tobacco harm reduction is clearly an integral part of its business strategy, selling tobacco remains its priority:

'Our core business is, and will remain in, tobacco but we've always made it clear that our goal is to provide those adult smokers who are seeking safer alternatives to cigarettes with a range of reduced-risk products that will meet their varying needs (BAT's director of corporate and regulatory affairs, Manchester Evening News)' ³¹²

It has also been noted in the tobacco industry trade press that 'it is unclear whether the big companies will allow e-cigarettes to overtake their principle product: tobacco' (T Donohue, Industry Analyst)³¹³

While promoting a product that may reduce or replace nicotine consumption may seem counterintuitive for the tobacco industry, an industry analyst explains how this lateral thinking works:

'The starting point is – here is a product designed to stop people smoking and reduce our sales volumes. The endpoint, the reversal, is – here is a product we can adapt and sell as an alternative to smoking – something to create the same satisfaction as the cigarette without the same marketing restrictions and the same draconian regulation. And a new product by which the tobacco industry may be able to mitigate or even balance the losses in value sales due to declining cigarette volumes' (D Hedley, Industry Analyst)³¹⁴

The safer alternative is 'aimed at smokers who want to quit or cut down but still want a nicotine kick' and requires 'regulatory approval' to be marketed in this way (K Feddy, Manchester Evening News).³¹⁵ BAT therefore welcomed the MHRA's decision to regulate e-cigarettes as this 'could play an important role in public health and tobacco harm reduction' (A Ralph, The Times),³¹⁶ and much of its stakeholder marketing leading up the announcement was aligned with the Department of Health's adoption of a harm reduction indication for Nicotine Replacement Therapy (NRT) (Dept of Health).³¹⁷

It has also been noted that tobacco companies may be well positioned to profit from having their e-cigarettes prescribed on the NHS if their brands are licensed as medicines (A Ralph, The Times).³¹⁸

For the first time, tobacco companies have created 'boardroom role[s] for alternative smokes' (S Hawkes, The Sun)³¹⁹ and moved senior executives to assume new roles of head of 'Next Generation Product' (N Thomas, Daily Telegraph)³²⁰. suggesting that the objective is long-term growth and e-cigarettes may be the first of many safer alternative products on the market. Indeed, Imperial Tobacco is already collaborating with the developer Fontem Ventures to 'look at alternative ways of delivering nicotine beyond just e-cigarettes' (The Express)³²¹ and Philip Morris's parent company Altria has entered into new partnership with Fertin Pharma to develop 'innovative, non-combustible nicotine-containing products for adult tobacco consumers.' (Industry Press)³²²

Figure 31: Philip Morris International's plans for future 'lower risk' products

'...Philip Morris International (PMI) stated that it plans to be marketing a new type of cigarette that poses lower health risks by 2017. Three new products which will be sold as extensions to existing PMI international brands such as Marlboro, were mentioned, the 'most advanced of which' was a cigarette that heats tobacco rather than burning it, according to PMI...'

'...the trio of new products have 'the very real potential to not only be a game-changer, but also be the key to unlock several hitherto virgin territories, most notably the huge Chinese market.'

'It is of great interest to all those in the forecasting business that PMI has the confidence to talk of 'next generation' tobacco products and being 'on the eve of a paradigm shift' for the industry especially given the traditional nature of the tobacco industry and the conservative nature of the cigarette smoker where new products are concerned' (D Hedley, Industry Analyst)³²³

From a business perspective, e-cigarettes 'could be a valuable revenue stream in the developed world in future' as most of tobacco companies' growth is coming from Asia at present (E Wall, Sunday Telegraph).³²⁴ Tobacco industry trade press note that: 'e-cigarette use is most prominent in developed economies, where awareness of smoking dangers is high and income levels robust enough to support an experiment in alternative nicotine use' (J Mapother, Industry Analyst).³²⁵

Elsewhere in the tobacco trade press it has been noted that 'tobacco companies are increasingly moving toward alternative nicotine-delivery methods, especially in developed countries...they seem to have realized that instead of continuing their fight against tobacco-control efforts, it will be more fruitful to embrace the change and venture into competing markets' (R Shah, Industry Analyst).³²⁶

It is reported that the promotion and increased consumption of e-cigarettes has the potential to 'offset the decline of traditional smoking' (City AM)³²⁷ Lorillard stated that it acquired the e-cigarette brand, Blu Ecigs, as 'part of an industry wide push to diversify beyond the traditional cigarette business' (Industry Press)³²⁸ and the acquisition 'met or exceeded all of our [their] expectations, having achieved the goal of becoming accretive to earnings in its first year with Lorillard, and establishing a new platform or expansion' (Industry Press).³²⁹

There is some doubt, however, that the tobacco industry has the capacity to market a 'safe' product. One industry journal commentary posed the questions:

'Are e-cig manufacturers going to face the same public-relations debacle that occurred when smokers of light and ultralight cigarettes found that they were getting much more 'tar' than advertised? Are we going to have a revival of "Has there been a cover-up"? Will we be able to afford the price of the tickets?' (J Lauterbach, Industry Analyst)³³⁰

In an interview, one marketing expert noted how promoting an e-cigarette as a 'light' product may be advantageous for the e-cigarette marketer (see below).

'The word 'lights'...has got a long history in cigarette branding... virtually all the major brands have a 'lights' going on somewhere...if I was reading that as a marketing person I'd be going "wow, I can use the more blatant branding devices [like marketing a 'light' cigarette] that virtually anybody you know would link and associate with cigarettes, I am going to get that on a medicine, wow. What an amazing branding cue".

(Marketing Expert)

While the 'industry's record in developing such a product has thus far not been impressive', analysts note that a 'tobacco product accepted as lower risk and also appealing to smokers is the philosophers' stone of the tobacco industry' (D Hedley, Industry Analyst).³³¹

As well as being presented as reduced harm products, marketing aimed at consumers portray e-cigarettes as pleasurable lifestyle products. Blu e-Cigs, for example, uses an innovative pack to appeal to its consumers. The brand uses 'smart packs', which alert users when they come into fifty feet of other users – both packs start vibrating and flashing a blue light. The packs can be set to transmit Facebook and Twitter profiles in the event that users do not wish to approach others in real life settings, but would rather make virtual friends (S Cole, Marketplace.org).³³²

One marketing expert explained how this packaging may bring additional benefits to the e-cigarette brand:

'...the product distributed to the end user becomes a way for them to link up – bringing that sense of belonging and tribal nature of something like smoking. To me that suggests that technology will be a way to bring people together through your product. There are ways to give people benefits that you would normally get through other digital means as identifying fellow brand smokers...that is quite interesting, given what happened after the smoking ban – there was lots of chat about smirking and about the social nature of going outside and actually creating this sub-culture of people, who feel marginalised and having a shared sense of being together. So where is it going? I guess cigarettes come in cardboard packets at the moment and they are paper with tobacco inside them. There is no greater opportunity I guess to perhaps use technology in the way that the product is actually delivered beyond the functional packaging that protects the items at the moment and that actually becomes something more in itself.'

(Marketing Expert)

5.1.2 Price

As tobacco companies are selling both traditional and electronic cigarettes, from a marketing perspective, it would make sense for the prices between two brands promoted by the same company to be comparable.

While this marketing mechanism was not captured in our press and social media audit, recent reports in the media suggest that this may be the way forward:

'VUSE cartridges will be sold in packs of two at an estimated price of \$6. Just like the majority of electronic cigarette companies, R.J. Reynolds Vapor says one VUSE cartridge is the equivalent of a pack of analogs [traditional cigarettes]' (Vaperanks.com)³³³

One tobacco industry publication notes that 'on average, e-cigarettes are 70 percent cheaper than tobacco cigarettes... [which] presents a considerable value proposition to traditional smokers, most of who can be found on the lower end of the income scale' (TS Donohue, Industry Analyst). Whether the industry can maintain this pricing strategy remains to be seen.

5.1.3 Promotion and place

There is evidence that stakeholder marketing strategies are aimed at building the tobacco industry's credibility and establishing itself as a responsible enterprise that deserves to be included in public health policy making. One tobacco industry analyst notes how 'another piece of new conceptual thinking is the idea of "legitimacy' (D Hedley, Industry Analyst).

According to Lorillard's CEO, the company Blu ecigs:

'...gives Lorillard a meaningful seat at the table in the harm reduction debate, and we intend to provide responsible leadership to this emerging category. Through improvements in technology e-cigarettes will continue to get better and better, and with Lorillard's regulatory expertise and sales infrastructure, we believe the category can reach its potential in a responsible manner' (M Kessler, CEO Lorillard)³³⁶

The tobacco industry representative also highlights the need to align public and private interests through the harm reduction debate:

'...business objectives and public health objectives can be aligned for the best outcome....if all involved recognise that harm reduction, as opposed to prohibition, can become a meaningful part of an overall health strategy designed to reduce tobacco related disease. Government and industry can work together as partners...'

'Public health experts have long considered harm reduction a legitimate approach to the reduction, but not the elimination, of threats to life and health caused by various behaviours. We know that tobacco products will continue to be legal for the foreseeable future. We know that not all tobacco products are identical or equally harmful common sense tells us there is a clear continuum of risk. It is clear that a harm reduction policy will make greater strides than the discredited, all or nothing, abstinence only strategy' (M Kessler, CEO Lorillard)³³⁷

Elsewhere in tobacco industry trade press, it has been noted:

'Another word in the new vocabulary of tobacco products is legitimacy. This is epitomised in a UK example: while cigarettes are being progressively being [sic] locked away in cupboards and under counters so that they cannot be seen by children, Tesco, the UK's leading retailer, has special stalls explicitly promoting a brand of e-cigarette...A tobacco company selling e-cigarettes is regarded as giving the e-cigarette legitimacy, a stamp of approval that would not impress the anti-smoking lobby or the regulatory authority but might easily carry weight with smokers' (D Hedley, Industry Analyst)³³⁸

While 'it's hard to understand how prolonging the amount of time that must pass before MRTPs [modified risk tobacco products] can be marketed to consumers as safer alternatives', tobacco companies are putting pressure on health regulators to work with industry and 'improve their cooperation going forward' as they are aware that 'MRTP authorisation will allow advertising products like snus and e-cigarettes as safer alternatives to smoking' (J Mapother, Industry Analyst)³³⁹

Modified lower risk products will only be accepted by regulators, however, if there is 'scientific proof' to support this approach (J Mapother, Industry Analyst). The tobacco industry and e-cigarette industry, which currently 'does not do such research', is therefore being encouraged 'to research the electronic cigarette issue properly and deliver the results to whoever will listen' or else 'a vacuum will be left that will be filled with mumbo-jumbo, perhaps leading to electronic cigarette bans or regulations counterproductive in respect of positive health outcomes' (G Gay, Industry Analyst)³⁴¹

One publication asks for support for a body called Coresta, the Cooperation Centre for Scientific Research Relative to Tobacco, whose president is from BAT, vice president is from RJ Reynolds and has representatives from various tobacco companies including China National Tobacco Corporation, Imperial and Japan Tobacco on its board. The article notes that:

'...there is a chance that Coresta can bring some weight to bear, especially in the case of the US Food and Drug Administration, which is reasonably open and knows good research when it sees it. Coresta especially through its recommended methods, has a voice that has to be heard at times' (G Gay, Industry Analyst)³⁴²

Any efforts to restrict the tobacco industry from publishing research in the name of science are deemed to be 'depressing' as 'the word has to be spread about electronic cigarettes and other truly low-risk cigarette substitutes' (G Gay, Industry Analyst).³⁴³

A tobacco industry executive has similarly noted that:

'Embracing a sensible harm reduction strategy won't be easy, but there is a path forward. I think that path forward begins by agreeing on four principles. To begin, science must come first. Scientific data is critical, including the recognition that a vast science base has accumulated for decades. Second, we must base policies upon reality. Along with science, it's important to get out of the lab so we keenly understand a common-sense way how these products are used by individuals. Third, we must commit to working as partners. The development of policies needs to be accelerated in a collaborative fashion with the industry and the FDA working together. Prolonging the effective implementation of harm reduction policies favours no one. And fourth, we need a commitment to educate the public' (M Kessler, CEO Lorillard)³⁴⁴

One marketing expert explained why, from a business and marketing perspective, it may be useful for tobacco companies to align their views with those of health bodies (see below).



'...there is a corporate social responsibility thing here... the [tobacco] companies of the world suddenly they look good, "look we are promoting a thing, which these... bodies like the BMA and ASH all say is a good thing. Well it just shows you, we are here to help, we are here to stop these people dying of that evil product that we have marketed for all these years"..."'

(Marketing Expert)

In relation to current e-cigarette marketing strategies, one tobacco industry trade press publication noted that:

'...there are signs that the suppliers of e-cigarettes are going down some of the same marketing routes as tobacco manufacturers trod and depending on your viewpoint, making the same mistakes as the manufacturers did. There are available, for instance, fruit-flavoured e-cigarettes, with or without nicotine, and e-cigarettes aimed at women. I have talked to people who are opposed to these types of marketing ploys, and it is easy to see their point, but care is needed. For instance, if, as we are told, some women were attracted to traditional cigarettes by long, thin, glamorous looking products, is it not at least possible to imagine that their electronic counterparts could be successful at luring them away from their habit?' (G Gay, Industry Analyst)³⁴⁵

As noted in previously, e-cigarette companies are also promoting their brands wherever tobacco advertising is banned for example in magazines, newspapers and on television (see Figure 32).

Figure 32: Example of television advert for e-cigarette brand in the US

Blu eCigs, now owned by the tobacco company Lorillard, advertises its e-cigarette on television in the US. The advertisement uses the theme 'Rise from the ashes' and features Hollywood actor Stephen Dorff, who claims to have smoked for 20 years before trying Blu. He appeals to smokers to be adults about the choices they are making: to smoke e-cigarettes without feeling guilty, whenever and wherever they want, and to 'take their freedom back' (Bluecigs.com)³⁴⁶



'... the golden age of cigarette advertising for me was when the first restrictions came into play when you could not associate cigarette smoking with sexuality and success...you couldn't have women you know with their bosoms out you know, which is kind of what's going on [now]...you have to get the concept or otherwise it's just a visual of someone looking pretty cool, smoking...[it's] a kind of updated, slightly, classic smoking advert, tobacco advert...'

(Marketing Expert)

One marketing expert explained how current e-cigarette advertisements can push the boundaries of promoting smoking even though this is banned in traditional cigarette advertising (above).

5.1.4 Positioning

The tobacco industry appears to be using its marketing clout to differentiate itself from the pharmaceutical industry, which has an already established reputation in the NRT market, and other independent e-cigarette companies that are not as familiar with their consumers.

The competition between the tobacco and pharmaceutical companies in the e-cigarette business has been highlighted in industry trade press reports:

'...the pharmaceutical industry is trying hard to get all nicotine-only based devices regulated now that the tobacco industry is waiting in the wings with its own innovative products – a pre-emptive strike if you will to secure commercial interests under the guise of health' (W McEwen, Industry Analyst)³⁴⁷

'Low risk and non tobacco nicotine products which are pure commercial products rather than NRT products to help smokers quit smoking are clearly an idea whose time is coming at least as far as the industry is concerned, though the smoker is reserving judgement' (D Hedley, Industry Analyst)³⁴⁸

Tobacco company executives have expressed an interest in the e-cigarettes 'because you get all the benefits of not having combustion, but on the other hand you are maintaining the behaviour that cigarette smokers enjoyed' – and 'nothing on the (NRT) market meets the sensorial, emotional and physiological needs of smokers' (D Hedley, Industry Analyst)³⁴⁹

In the tobacco trade press, it has been noted that as tobacco companies 'know their customers' preferences well' and 'consumers would likely prefer tobacco companies' nicotine delivery products over NRT products, which users tend to view as medicinal products', 'these products could be used more for pleasure, which could pull sales up' (R Shah, Industry Analyst)³⁵⁰

Similarly, one marketing expert noted in an interview (below):



'...I can't see it [e-cigarettes] in the same way as I see Nicorette and all the rest of it. I can't see that same sense that it's a purely medical way of helping people stop smoking. I see it as a way of re-colonising the behaviour back out into the population again at a time when it's not actually seen very much.'

(Marketing Expert)

As the risks for tobacco companies entering the e-cigarette market are minimal due to the 'relatively low-cost' strategy and reduced 'litigation risk of the traditional cigarette business', the tobacco industry has very little to lose and potentially much to gain – unless e-cigarettes are regulated in the same way as traditional cigarettes (T Donohue, Industry Analyst).³⁵¹

Products are also being positioned on the market as 'organic' with 'only natural' flavour enhancers'; others are offering 'e-cigarette[s] with a paper filter instead of the plastic used by many of its competitors' (Industry Press).³⁵²

5.1.5 Summary

While evidence of the tobacco industry's marketing strategies for e-cigarettes is only just beginning to emerge, it is apparent that the objective is profit-maximisation through long-term sales of tobacco and 'safer alternative' products through 'next generation' products. Marketing efforts at present are directed at developed countries, where sales of traditional cigarettes may be on the decline.

In order to establish itself as responsible, legitimate and credible, the tobacco industry is predominantly focusing on stakeholder marketing and fostering collaborative partnerships with health regulators in particular. The concept of harm reduction gives the tobacco industry a justifiable seat at the policy making table and access to key political decision makers. Public-partner partnerships are propagated and the tobacco industry is using harm reduction as an opportunity to become a part of the solution for a problem it created.

In order to generate scientific proof, companies and affiliated bodies are being encouraged to produce research to prove that e-cigarettes are reduced harm products and the safer alternative to cigarettes. While this data is expected to satisfy regulators, consumers are reassured that e-cigarettes are also lifestyle products that should also be used for pleasure.

The products on offer allow smokers to regain their freedom as they can be used everywhere – even where the smoking ban is enforced. The affordable and glamorous alternatives to smoking are being advertised on television, in films, on billboards, in magazines and newspapers – wherever tobacco advertising bans are in place. Celebrities are endorsing the products as healthier, must-have accessories rather than nicotine replacement therapies: while e-cigarettes provide an alternative for those who can't or won't quit, they are clearly differentiated from 'uncool' NRT products.

6 Conclusions and research implications

The data presented here has to be analysed in the context of wider tobacco control strategy both in the UK and across the world. For example, the tobacco industry's interest in harm reduction has implications for the Framework Convention on Tobacco Control. The evocative advertising and POS campaigns being used to promote e-cigarettes in the UK should also be seen in the light of tight marketing controls on other nicotine products; and the tendency for some e-cigarettes to closely mimic conventional ones also needs to be set against both prevention and cessation policy. This wider analysis is presented at the beginning of the report in 'Key Findings, Conclusions and Implications'.

Appendix 1

UK Intellectual Property Office: Published Trademark Applications

1st May 2012 – 28th May 2013

1. United Kingdom Intellectual Property Office Publishes Application for Series of 2 Identical Trademarks "NYK ECIGS TASTE LIFE" to Rimocom for Multiple Goods. UK Government News (HT Media Ltd.), May 2, 2012 Wednesday 5:17 PM EST, 199 words.
2. United Kingdom Intellectual Property Office Publishes Application for Trademark "Lavatube" to Lordprice for Multiple Goods and Services. UK Government News (HT Media Ltd.), May 9, 2012 Wednesday 7:59 PM EST, 393 words.
3. United Kingdom Intellectual Property Office Publishes Application for Trademark "Echo electronic cigarette" to Gower Enterprises for Multiple Goods. UK Government News (HT Media Ltd.), May 15, 2012 Tuesday 7:04 PM EST, 105 words.
4. United Kingdom Intellectual Property Office Publishes Application for Trademark "fumus" to James Ryan Gillespie for Electronic Cigarettes. UK Government News (HT Media Ltd.), May 28, 2012 Monday 11:58 AM EST, 92 words.
5. United Kingdom Intellectual Property Office Publishes Application for the Trademark "uneecig" to Universal E Cig for Multiple Products. UK Government News (HT Media Ltd.), June 13, 2012 Wednesday 7:30 PM EST, 144 words.
6. United Kingdom Intellectual Property Office Publishes Application for Trademark "EGO" to David Xiu for Multiple Goods. UK Government News (HT Media Ltd.), June 24, 2012 Sunday 7:40 PM EST, 198 words.
7. United Kingdom Intellectual Property Office Publishes Application for Trademark "ploom" to Ploom for Multiple Goods. UK Government News (HT Media Ltd.), July 6, 2012 Friday 3:58 PM EST, 103 words.
8. United Kingdom Intellectual Property Office Publishes Application for Trademarks "LUCKY BOO'S and LUCKY BOOS" to NKSupply for Multiple Goods. UK Government News (HT Media Ltd.), July 17, 2012 Tuesday 3:43 PM EST, 140 words.
9. United Kingdom Intellectual Property Office Publishes Application for the Trademark "T JUICE BEAUTIFULLY MADE IN THE" to Cuts Ice for Various Services. UK Government News (HT Media Ltd.), July 18, 2012 Wednesday 1:36 PM EST, 106 words.
10. United Kingdom Intellectual Property Office Publishes Application for Trademark "Laurrietz" to Laurriet for Multiple Goods. UK Government News (HT Media Ltd.), July 25, 2012 Wednesday 1:06 PM EST, 138 words.
11. United Kingdom Intellectual Property Office Publishes Application for Trademark "KINGO" to OK Smokey.com for Cigarette. UK Government News (HT Media Ltd.), August 1, 2012 Wednesday 2:12 PM EST, 100 words.

12. United Kingdom Intellectual Property Office Publishes Application for Trademark "idrink" to David Xiu for Multiple Goods. UK Government News (HT Media Ltd.), August 7, 2012 Tuesday 10:09 PM EST, 210 words.
13. United Kingdom Intellectual Property Office Publishes Application for the Trademark "SKYCIG" to Zulu Ventures for Multiple Products. UK Government News (HT Media Ltd.), August 8, 2012 Wednesday 1:38 PM EST, 204 words.
14. United Kingdom Intellectual Property Office Publishes Application for Trademark "elite e-cigarettes" to ease-trade for Cigarettes. UK Government News (HT Media Ltd.), August 15, 2012 Wednesday 8:32 AM EST, 105 words.
15. United Kingdom Intellectual Property Office Publishes Application for Trademarks "elan, elan e-cigarettes, elan e-cigarettes and elan" to ease-trade for Multiple Goods. UK Government News (HT Media Ltd.), August 15, 2012 Wednesday 8:27 AM EST, 128 words.
16. United Kingdom Intellectual Property Office Publishes Application for Series of 2 Identical Trademarks "VSAVI" to 1111 EC Services for Multiple Goods. UK Government News (HT Media Ltd.), August 17, 2012 Friday 11:00 AM EST, 152 words.
17. United Kingdom Intellectual Property Office Publishes Application for Trademark "Ciggies" to Albert Peter Davy for Electronic Cigarettes. UK Government News (HT Media Ltd.), September 4, 2012 Tuesday 1:21 PM EST, 155 words.
18. United Kingdom Intellectual Property Office Publishes Application for Trademark "JENSON" to Jenson E-Cig for Electronic Cigarettes. UK Government News (HT Media Ltd.), September 7, 2012 Friday 1:46 PM EST, 91 words.
19. United Kingdom Intellectual Property Office Publishes Application for Trademark "Duracig" to Russell Smyth for Electronic Cigarettes. UK Government News (HT Media Ltd.), September 10, 2012 Monday 1:42 PM EST, 97 words.
20. United Kingdom Intellectual Property Office Publishes Application for the Trademark "N NIQOLEX" to Niqolex for Multiple Products. UK Government News (HT Media Ltd.), September 21, 2012 Friday 2:13 PM EST, 136 words.
21. United Kingdom Intellectual Property Office Publishes Application for Trademark "CigStar" to Feellife Bioscience International Co. for Multiple Goods. UK Government News (HT Media Ltd.), September 22, 2012 Saturday 5:14 PM EST, 289 words.
22. United Kingdom Intellectual Property Office Publishes Application for Trademark "e" to Darran Monkhouse for Multiple Goods. UK Government News (HT Media Ltd.), September 25, 2012 Tuesday 4:29 PM EST, 95 words.
23. United Kingdom Intellectual Property Office Publishes Application for Trademark "glow lighting up the future" to Daniel Sesay for Electronic Cigarettes. UK Government News (HT Media Ltd.), September 26, 2012 Wednesday 4:52 PM EST, 100 words.

24. United Kingdom Intellectual Property Office Publishes Application for the Trademark "ultracig" to Alastair Johnstone for Multiple Products. UK Government News (HT Media Ltd.), October 6, 2012 Saturday 4:08 PM EST, 251 words.
25. United Kingdom Intellectual Property Office Publishes Application for Trademark "ae VAEPE" to Vaepe for Electronic Cigarettes. UK Government News (HT Media Ltd.), October 7, 2012 Sunday 5:29 PM EST, 103 words.
26. United Kingdom Intellectual Property Office Publishes Application for the Trademark "ZENSE" to Imperial Tobacco for Multiple Products. UK Government News (HT Media Ltd.), October 12, 2012 Friday 3:19 PM EST, 233 words.
27. United Kingdom Intellectual Property Office Publishes Application for Trademark "ae VAEPE" to Vaepe for Multiple Services. UK Government News (HT Media Ltd.), October 19, 2012 Friday 6:47 PM EST, 172 words.
28. United Kingdom Intellectual Property Office Publishes Application for the Trademark "VAPOURLICIOUS" to Jamie Christopher Jones for Multiple Products. UK Government News (HT Media Ltd.), October 23, 2012 Tuesday 12:45 PM EST, 128 words.
29. United Kingdom Intellectual Property Office Publishes Application for Trademark "E-Right" to Madna (UK) for Electronic Cigarettes and Accessories. UK Government News (HT Media Ltd.), November 6, 2012 Tuesday 12:42 PM EST, 101 words.
30. United Kingdom Intellectual Property Office Publishes Application for Trademark "nicolites electronic cigarettes" to Nikhil Nathwani for Multiple Goods and Services. UK Government News (HT Media Ltd.), November 9, 2012 Friday 1:40 PM EST, 278 words.
31. United Kingdom Intellectual Property Office Publishes Application for Trademarks "E-Nargila and Electronic Nargila" to OK Smokey.com for Electronic Cigarette. UK Government News (HT Media Ltd.), November 14, 2012 Wednesday 11:55 AM EST, 106 words.
32. United Kingdom Intellectual Property Office Publishes Application for Trademark "e-blu" to e-blu for Multiple Goods. UK Government News (HT Media Ltd.), November 14, 2012 Wednesday 9:42 AM EST, 105 words.
33. United Kingdom Intellectual Property Office Publishes Application for Trademark "eTouch" to Smiss Technology Co. for Multiple Goods and Services. UK Government News (HT Media Ltd.), November 19, 2012 Monday 10:03 PM EST, 122 words.
34. United Kingdom Intellectual Property Office Publishes Application for Trademark "A-Lites Alive with Flavour" to A-Lites for Multiple Goods. UK Government News (HT Media Ltd.), November 23, 2012 Friday 4:44 PM EST, 226 words.
35. United Kingdom Intellectual Property Office Publishes Application for Trademark "ELIPS EGO" to David Xiu for Multiple Goods. UK Government News (HT Media Ltd.), December 11, 2012 Tuesday 2:17 PM EST, 211 words.

36. United Kingdom Intellectual Property Office Publishes Application for Trademark "AAAecig" to NRGs Health for Multiple Goods. UK Government News (HT Media Ltd.), December 14, 2012 Friday 5:10 PM EST, 133 words.
37. United Kingdom Intellectual Property Office Publishes Application for Trademark "CloudStix.com" to Cloudstix for Multiple Goods. UK Government News (HT Media Ltd.), December 15, 2012 Saturday 8:24 PM EST, 135 words.
38. United Kingdom Intellectual Property Office Publishes Application for Trademark "JAI" to Imperial Tobacco for Multiple Goods. UK Government News (HT Media Ltd.), December 19, 2012 Wednesday 10:28 AM EST, 233 words.
39. United Kingdom Intellectual Property Office Publishes Application for Trademark "ENDD ENDS" to David Xiu for Multiple Services. UK Government News (HT Media Ltd.), December 24, 2012 Monday 7:34 PM EST, 288 words.
40. United Kingdom Intellectual Property Office Publishes Application for the Trademark "Ultra Vape" to Andrew James for Multiple Products. UK Government News (HT Media Ltd.), December 26, 2012 Wednesday 5:32 PM EST, 123 words.
41. United Kingdom Intellectual Property Office Publishes Application for Trademark "KING" to Smoke Without Sin for Electronic Cigarettes and Vapourising Devices. UK Government News (HT Media Ltd.), December 27, 2012 Thursday 10:54 AM EST, 106 words.
42. United Kingdom Intellectual Property Office Publishes Application for Trademark "a aqwa" to Aqwa for Multiple Goods and Services. UK Government News (HT Media Ltd.), December 28, 2012 Friday 7:54 PM EST, 299 words.
43. United Kingdom Intellectual Property Office Publishes Application for Trademark "KIK" to Supreme Imports for Multiple Goods. UK Government News (HT Media Ltd.), January 3, 2013 Thursday 6:22 PM EST, 142 words.
44. United Kingdom Intellectual Property Office Publishes Application for Trademark "ishisha" to David Xiu for Multiple Goods. UK Government News (HT Media Ltd.), January 3, 2013 Thursday 5:05 PM EST, 229 words.
45. United Kingdom Intellectual Property Office Publishes Application for the Trademark "TITANIUM ICE" to Pillbox38 for Multiple Products. UK Government News (HT Media Ltd.), January 7, 2013 Monday 6:21 PM EST, 192 words.
46. United Kingdom Intellectual Property Office Publishes Application for Trademark "AZTECA" to Bilal Mahmood for Multiple Goods. UK Government News (HT Media Ltd.), January 18, 2013 Friday 7:15 PM EST, 116 words.
47. United Kingdom Intellectual Property Office Publishes Application for Trademark "FONTEM" to Imperial Tobacco for Multiple Goods. UK Government News (HT Media Ltd.), January 29, 2013 Tuesday 6:57 PM EST, 234 words.

48. United Kingdom Intellectual Property Office Publishes Application for Series of 2 Identical Trademarks "i vapour" to I Love Vapour for Multiple Goods and Services. UK Government News (HT Media Ltd.), January 30, 2013 Wednesday 2:55 PM EST, 181 words.
49. United Kingdom Intellectual Property Office Publishes Application for the Trademark "UVAPE" to UV APE for Multiple Products. UK Government News (HT Media Ltd.), February 5, 2013 Tuesday 3:14 PM EST, 101 words.
50. United Kingdom Intellectual Property Office Publishes Application for Trademark "Glow electronic cigarettes" to Daniel Sesay for Electronic Cigarettes. UK Government News (HT Media Ltd.), February 5, 2013 Tuesday 2:57 PM EST, 100 words.
51. United Kingdom Intellectual Property Office Publishes Application for the Trademark "smiss your life, we care!" to Smiss Technology for Multiple Products and Services. UK Government News (HT Media Ltd.), February 6, 2013 Wednesday 1:51 PM EST, 123 words.
52. United Kingdom Intellectual Property Office Publishes Application for Trademark "5 COLOURS Premium Electronic Cigarettes" to Sorse Distribution for Multiple Goods. UK Government News (HT Media Ltd.), February 8, 2013 Friday 9:46 PM EST, 177 words.
53. United Kingdom Intellectual Property Office Publishes Application for the Trademark "NECTAR" to Nicholas Murnin for Multiple Products. UK Government News (HT Media Ltd.), February 12, 2013 Tuesday 4:28 PM EST, 113 words.
54. United Kingdom Intellectual Property Office Publishes Application for Trademark "esheesha" to UK Electronic Cigarette for Multiple Goods. UK Government News (HT Media Ltd.), February 13, 2013 Wednesday 8:09 PM EST, 305 words.
55. United Kingdom Intellectual Property Office Publishes Application for the Trademark "SKYSTART" to Zulu Ventures for Multiple Products. UK Government News (HT Media Ltd.), February 13, 2013 Wednesday 7:52 PM EST, 204 words.
56. United Kingdom Intellectual Property Office Publishes Application for the Trademark "Shishaa LONDON" to Vapouriz for Multiple Products and Services. UK Government News (HT Media Ltd.), February 13, 2013 Wednesday 7:30 PM EST, 767 words.
57. United Kingdom Intellectual Property Office Publishes Application for Trademark "eGo-W" to OK Smokey.com for Electronic Cigarette. UK Government News (HT Media Ltd.), February 13, 2013 Wednesday 6:50 PM EST, 104 words.
58. United Kingdom Intellectual Property Office Publishes Application for Trademark "ISTIX" to Awais Raza Sheikh for Multiple Goods. UK Government News (HT Media Ltd.), February 15, 2013 Friday 9:39 AM EST, 344 words.
59. United Kingdom Intellectual Property Office Publishes Application for Trademark "bex" to Bex for Electronic Cigarettes. UK Government News (HT Media Ltd.), February 17, 2013 Sunday 7:41 PM EST, 97 words.

60. United Kingdom Intellectual Property Office Publishes Application for Series of 2 Identical Trademarks "Mavicci SMOKELESS CIGARETTE" to The Alternative Cigarette for Multiple Goods. UK Government News (HT Media Ltd.), February 18, 2013 Monday 12:55 PM EST, 204 words.
61. United Kingdom Intellectual Property Office Publishes Application for Trademark "cigtronica" to Hing Fung Wong for Multiple Goods and Services. UK Government News (HT Media Ltd.), February 24, 2013 Sunday 8:04 PM EST, 132 words.
62. United Kingdom Intellectual Property Office Publishes Application for the Trademark "Vaportech" to Smiss Technology for Multiple Products and Services. UK Government News (HT Media Ltd.), February 25, 2013 Monday 7:10 PM EST, 121 words.
63. United Kingdom Intellectual Property Office Publishes Application for Trademark "Frumist" to Frumist for Electronic Cigarettes and E-Liquids. UK Government News (HT Media Ltd.), March 4, 2013 Monday 5:06 PM EST, 100 words.
64. United Kingdom Intellectual Property Office Publishes Application for Series of 2 Identical Trademarks "MLite" to Strand Europe for Multiple Goods. UK Government News (HT Media Ltd.), March 4, 2013 Monday 1:19 PM EST, 157 words.
65. United Kingdom Intellectual Property Office Publishes Application for Trademark "JPS" to Imperial Tobacco for Multiple Goods. UK Government News (HT Media Ltd.), March 6, 2013 Wednesday 2:55 PM EST, 234 words.
66. United Kingdom Intellectual Property Office Publishes Application for Trademark "agua Vape" to A-Lites for Multiple Goods. UK Government News (HT Media Ltd.), March 12, 2013 Tuesday 12:36 PM EST, 224 words.
67. United Kingdom Intellectual Property Office Publishes Application for the Trademark "VIVID" to Must Have for Multiple Products. UK Government News (HT Media Ltd.), March 13, 2013 Wednesday 4:36 PM EST, 127 words.
68. United Kingdom Intellectual Property Office Publishes Application for Series of 2 Trademarks to Vertigo for Multiple Products. UK Government News (HT Media Ltd.), March 13, 2013 Wednesday 4:29 PM EST, 101 words.
69. United Kingdom Intellectual Property Office Publishes Application for Trademark "d m" to Diamond Mist for Multiple Goods. UK Government News (HT Media Ltd.), March 13, 2013 Wednesday 2:38 PM EST, 153 words.
70. United Kingdom Intellectual Property Office Publishes Application for Series of 2 Identical Trademarks "era 3 21st Century Smoking" to Imtiaz Ahmed for Multiple Goods. UK Government News (HT Media Ltd.), March 14, 2013 Thursday 12:21 PM EST, 120 words.
71. United Kingdom Intellectual Property Office Publishes Application for the Trademark "smokejoes" to Rhians Time for Multiple Products. UK Government News (HT Media Ltd.), March 19, 2013 Tuesday 4:08 PM EST, 109 words.

72. United Kingdom Intellectual Property Office Publishes Application for Trademark "EHUKKA" to Ehukka for Electric Shisha Stick. UK Government News (HT Media Ltd.), March 19, 2013 Tuesday 3:30 PM EST, 96 words.
73. United Kingdom Intellectual Property Office Publishes Application for Trademark "Go-lites ELECTRONIC CIGARETTES" to Worldtronics for Multiple Goods and Services. UK Government News (HT Media Ltd.), March 20, 2013 Wednesday 1:46 PM EST, 277 words.
74. United Kingdom Intellectual Property Office Publishes Application for Trademark "ecigzoo" to EcigBubble for Multiple Goods. UK Government News (HT Media Ltd.), March 25, 2013 Monday 5:32 PM EST, 316 words.
75. United Kingdom Intellectual Property Office Publishes Application for the Trademark "NICOHIT" to Nuzhat Rashid for Multiple Products. UK Government News (HT Media Ltd.), March 26, 2013 Tuesday 5:43 PM EST, 173 words.
76. United Kingdom Intellectual Property Office Publishes Application for Trademark "Hard candy" to Hard Candy (UK) for Multiple Goods and Services. UK Government News (HT Media Ltd.), March 26, 2013 Tuesday 5:39 PM EST, 784 words.
77. United Kingdom Intellectual Property Office Publishes Application for Trademark "AUTHENTIC TASTE SUPA 8S PREMIUM ELECTRONIC CIGARETTES" to Supa 8s for Multiple Goods. UK Government News (HT Media Ltd.), April 13, 2013 Saturday 6:00 PM EST, 147 words.
78. United Kingdom Intellectual Property Office Publishes Application for Trademark "Here4Health" to Here4Health for Multiple Goods. UK Government News (HT Media Ltd.), April 16, 2013 Tuesday 3:51 PM EST, 113 words.
79. United Kingdom Intellectual Property Office Publishes Application for Trademark "eMiss" to Smiss Technology for Multiple Goods and Services. UK Government News (HT Media Ltd.), April 22, 2013 Monday 7:47 PM EST, 110 words.
80. United Kingdom Intellectual Property Office Publishes Application for Series of 2 Trademarks to Bharat Nathwani for Multiple Products and Services. UK Government News (HT Media Ltd.), April 22, 2013 Monday 7:39 PM EST, 223 words.
81. United Kingdom Intellectual Property Office Publishes Application for Trademark "eLeaf" to Joyetech (Changzhou) Electronics for Multiple Goods. UK Government News (HT Media Ltd.), April 22, 2013 Monday 7:38 PM EST, 198 words.
82. United Kingdom Intellectual Property Office Publishes Application for Trademarks "DETOXX and detoxx" to Vertigo (UK) for Smokers Articles and Electronic Cigarettes. UK Government News (HT Media Ltd.), April 22, 2013 Monday 6:21 PM EST, 94 words.
83. United Kingdom Intellectual Property Office Publishes Application for the Trademark "totally eliquid" to IP Eye for Liquid. UK Government News (HT Media Ltd.), April 22, 2013 Monday 3:31 PM EST, 96 words.

84. United Kingdom Intellectual Property Office Publishes Application for the Trademark "TUSSTU" to Connecting Commerce for Multiple Products. UK Government News (HT Media Ltd.), April 30, 2013 Tuesday 2:07 PM EST, 131 words.
85. United Kingdom Intellectual Property Office Publishes Application for the Trademark "SOCIALITES" to Yantari for Multiple Products. UK Government News (HT Media Ltd.), May 2, 2013 Thursday 6:09 PM EST, 147 words.
86. United Kingdom Intellectual Property Office Publishes Application for Trademark "Magic-Flight" to Magic-Flight General Manufacturing for Multiple Goods. UK Government News (HT Media Ltd.), May 3, 2013 Friday 2:50 PM EST, 165 words.
87. United Kingdom Intellectual Property Office Publishes Application for Trademark "ClearMist" to ClearMist Electronics Cigarettes for Multiple Goods. UK Government News (HT Media Ltd.), May 6, 2013 Monday 7:23 PM EST, 95 words.
88. United Kingdom Intellectual Property Office Publishes Application for Trademark "Liberty Flights" to Liberty Flights for Multiple Goods. UK Government News (HT Media Ltd.), May 8, 2013 Wednesday 8:56 AM EST, 95 words.
89. United Kingdom Intellectual Property Office Publishes Application for Trademark "K" to Halco Products for Multiple Goods and Services. UK Government News (HT Media Ltd.), May 9, 2013 Thursday 9:43 AM EST, 288 words.
90. United Kingdom Intellectual Property Office Publishes Application for the Trademark "Vibrant Vapours E-Liquid" to Vibrant Vapours for Multiple Products. UK Government News (HT Media Ltd.), May 13, 2013 Monday 4:42 PM EST, 127 words.
91. United Kingdom Intellectual Property Office Publishes Application for the Trademark "Xquisite Smoke, Eternal, Infinite, Unique" to Xquisite Smoke for Multiple Products and Services. UK Government News (HT Media Ltd.), May 13, 2013 Monday 4:01 PM EST, 113 words.
92. United Kingdom Intellectual Property Office Publishes Application for the Trademark "You Cig" to London Smart Venture for Electronic Cigarettes. UK Government News (HT Media Ltd.), May 13, 2013 Monday 2:44 PM EST, 85 words.
93. United Kingdom Intellectual Property Office Publishes Application for Trademark "Evorettes" to S Evokes Electronic Cigarette trix for Multiple Goods. UK Government News (HT Media Ltd.), May 15, 2013 Wednesday 5:50 PM EST, 139 words.
94. United Kingdom Intellectual Property Office Publishes Application for the Trademark "SEC" to STOCKPORT E-CIG for Multiple Products. UK Government News (HT Media Ltd.), May 21, 2013 Tuesday 7:45 PM EST, 140 words.
95. United Kingdom Intellectual Property Office Publishes Application for Trademark "Hubbly Bubbly" to Hubbly Bubbly for Multiple Goods and Services. UK Government News (HT Media Ltd.), May 24, 2013 Friday 1:19 PM EST, 752 words.

29th May – 11th June 2013: 2 Weeks Pre-MHRA Announcement

1. United Kingdom Intellectual Property Office Publishes Application for Trademark “Elarettes” to Evokes Electronic Cigarette for Multiple Goods. UK Government News (HT Media Ltd.), May 30, 2013 Thursday 5:24 PM EST.
2. United Kingdom Intellectual Property Office Publishes Application for Trademark “GO-LIQUID” to Go-liquid for Electronic Cigarettes. UK Government News (HT Media Ltd.), May 31, 2013 Friday 8:33 PM EST.
3. United Kingdom Intellectual Property Office Publishes Application for Trademarks “ezi-cig and ezi cig” to Poundworld Retail for Multiple Goods and Services. UK Government News (HT Media Ltd.), June 5, 2013 Wednesday 9:17 PM EST.
4. United Kingdom Intellectual Property Office Publishes Application for the Trademark “Shisha Sticks” to Arcade International for Multiple Products and Services. UK Government News (HT Media Ltd.), June 5, 2013 Wednesday 7:58 PM EST.
5. United Kingdom Intellectual Property Office Publishes Application for Trademark “esig” to Bruce Bushby for Electronic Cigarettes. UK Government News (HT Media Ltd.), June 5, 2013 Wednesday 5:31 PM EST,
6. United Kingdom Intellectual Property Office Publishes Application for Trademark “e-nic” to Christopher Glass for Multiple Goods. UK Government News (HT Media Ltd.), June 5, 2013 Wednesday 5:03 PM EST.
7. United Kingdom Intellectual Property Office Publishes Application for Series of 2 Identical Trademarks “THE VAPIRE” to Ajaz Akbar a partner in The Ecigaretteoutlet partnership for Tobacco Substitutes. UK Government News (HT Media Ltd.), June 6, 2013 Thursday 7:25 PM EST.
8. United Kingdom Intellectual Property Office Publishes Application for the Trademark “TC. TCcigs” to Williams Brothers for Multiple Products. UK Government News (HT Media Ltd.), June 6, 2013 Thursday 5:15 PM EST.
9. United Kingdom Intellectual Property Office Publishes Application for Trademarks “Concept Liquids and CONCEPT LIQUIDS” to Concept Liquids for Multiple Goods. UK Government News (HT Media Ltd.), June 8, 2013 Saturday 7:08 PM EST.
10. United Kingdom Intellectual Property Office Publishes Application for Trademark “CIGPOWER” to Smiss Technology for Multiple Goods and Services. UK Government News (HT Media Ltd.), June 8, 2013 Saturday 6:14 PM EST.
11. United Kingdom Intellectual Property Office Publishes Application for Trademark “ mego” to Smiss Technology Co. for Multiple Goods and Services. UK Government News (HT Media Ltd.), June 10, 2013 Monday 2:09 PM EST.

12. United Kingdom Intellectual Property Office Publishes Application for Trademark "EPAD" to Smiss Technology for Multiple Goods and Services. UK Government News (HT Media Ltd.), June 11, 2013 Tuesday 5:16 PM EST.
13. United Kingdom Intellectual Property Office Publishes Application for Trademark "ECigaretteOutlet" to The Ecigaretteoutlet partnership for Tobacco Substitutes. UK Government News (HT Media Ltd.), June 11, 2013 Tuesday 4:21 PM EST.
14. United Kingdom Intellectual Property Office Publishes Application for Series of 2 Identical Trademarks "M & H REGUM FILLI LITE-UP ANYWHERE" to Lite-Up Anywhere for Multiple Goods. UK Government News (HT Media Ltd.), June 11, 2013 Tuesday 9:29 AM EST.

12th June – 26th June 2013: 2 Weeks Post-MHRA Announcement

1. United Kingdom Intellectual Property Office Publishes Application for Trademarks "House of Liquid and HOUSE OF LIQUID" to Concept Liquids for Multiple Goods. UK Government News (HT Media Ltd.), June 13, 2013 Thursday 2:50 PM EST.
2. United Kingdom Intellectual Property Office Publishes Application for the Trademark "VAPEIT" to Smiss Technology for Multiple Products and Services. UK Government News (HT Media Ltd.), June 14, 2013 Friday 8:34 PM EST.
3. United Kingdom Intellectual Property Office Publishes Application for the Trademark "Vapour Room" to Vapour Room for Multiple Products. UK Government News (HT Media Ltd.), June 14, 2013 Friday 8:32 PM EST.
4. United Kingdom Intellectual Property Office Publishes Application for the Trademark "Vshisha" to Ballal Malik for Electronic Shisha. UK Government News (HT Media Ltd.), June 14, 2013 Friday 7:57 PM EST.
5. United Kingdom Intellectual Property Office Publishes Application for the Trademark "X-VOLT" to Smiss Technology for Multiple Products and Services. UK Government News (HT Media Ltd.), June 14, 2013 Friday 3:41 PM EST.
6. United Kingdom Intellectual Property Office Publishes Application for the Trademark "x-watt" to Smiss Technology for Multiple Products and Services. UK Government News (HT Media Ltd.), June 14, 2013 Friday 3:39 PM EST.
7. United Kingdom Intellectual Property Office Publishes Application for Trademark "MCH" to Smiss Technology for Multiple Goods and Services. UK Government News (HT Media Ltd.), June 16, 2013 Sunday 12:14 PM EST.
8. United Kingdom Intellectual Property Office Publishes Application for Trademark "Cig-net" to Richard Rowe for Multiple Goods and Services. UK Government News (HT Media Ltd.), June 17, 2013 Monday 3:07 PM EST.

9. United Kingdom Intellectual Property Office Publishes Application for Trademark "Cig-nature" to Richard Rowe for Multiple Goods. UK Government News (HT Media Ltd.), June 17, 2013 Monday 3:06 PM EST.
10. United Kingdom Intellectual Property Office Publishes Application for Trademark "eLuv" to Smiss Technology for Multiple Goods and Services. UK Government News (HT Media Ltd.), June 19, 2013 Wednesday 4:31 PM EST.
11. United Kingdom Intellectual Property Office Publishes Application for Trademark "LA VIE" to Pharmore for Multiple Goods and Services. UK Government News (HT Media Ltd.), June 19, 2013 Wednesday 9:14 AM EST.
12. United Kingdom Intellectual Property Office Publishes Application for Trademark "Cartomizer world" to Cartomizer World for Electric Cigarette Products. UK Government News (HT Media Ltd.), June 25, 2013 Tuesday 2:54 PM EST.

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