Published in final edited form as:

Tob Regul Sci. 2017 April ; 3(2): 222–231. doi:10.18001/TRS.3.2.10.

The Advertising Strategies of Early E-cigarette Brand Leaders in the United States

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Abstract

Objectives—We examined differential advertising strategies used by 4 major United States e-cigarette companies with differential affiliations with the traditional tobacco industry (ie, Njoy - independent, Blu - acquired, Vuse and MarkTen - launched by cigarette companies) over time.

Methods—We conducted a mixed-methods study regarding e-cigarette adspend, adspend per media channel (eg, TV, print), and advertising messaging strategies among these 4 top e-cigarette brands from January 2013 through December 2015.

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Human Subjects Statement

This study was deemed exempt from Institutional Review Board approvals, per Emory University's Institutional Review Board (#IRB00076051).

Conflict of Interest Statement

The authors declare no conflicts of interest.

Results—E-cigarette adspend increased from \$59 million in 2013 to \$91 million in 2014, followed by a sharp decline to \$37 million in 2015. These companies showed distinct spending trajectories overall and across media channels, with Njoy and Vuse spending a higher proportion of their dollars on TV and Blu and MarkTen spending more on print. Marketing messages were also different by company. Key themes included switching from cigarettes (particularly by Njoy and Blu), circumventing smoke-free policies (particularly by Blu), and technological advancement (particularly by Vuse and MarkTen).

Conclusions—These e-cigarette brands have shifted their adspend, use of media channels, and advertising messaging strategies over time. Some differing strategies may reflect the different affiliations of each brand to the traditional cigarette industry.

Keywords

e-cigarettes; advertising; tobacco industry; tobacco control

E-cigarettes have demonstrated an impressive emergence in the United States (US) market, particularly in the past 5 years.^{1,2} Since the emergence of the first generation of e-cigarettes, which resembled regular cigarettes in size and appearance (ie, “cigalikes”), these devices have been controversial. E-cigarettes may be a less harmful alternative than smoking, provide health benefits to smokers who switch completely,³ alleviate cigarette cravings,⁴ and aid in cessation.^{5–8} On the other hand, the promotion of e-cigarettes might have a negative population health impact if they influence nonsmokers to initiate e-cigarette use, serve as a gateway to tobacco products, undermine smoke-free policies and ongoing efforts to denormalize smoking, or have long-term negative health effects.^{9–11}

This controversy inherently suggests that the marketing strategies of e-cigarettes are important to examine, as these strategies impact how e-cigarettes are perceived and used. Advertising attracts new users,^{12–16} promotes continued use,^{17–19} builds brand loyalty,²⁰ and expands tobacco markets.^{14,15,17,20} For newly introduced products such as e-cigarettes, advertising is paramount to the product’s success,²¹ as the first exposure is the most influential for short-term sales or gains.²²

The content of the messages companies use to advertise e-cigarettes is critical, as this may influence who uses them and why they initiate or continue use. Thematically, several strategies have been used to promote e-cigarettes. They have been promoted as a smoking cessation aid,^{23–26} for use where smoking is not allowed,^{24,27,28} as a safer alternative to traditional cigarettes,^{23–26,29,30} and for use in social settings.³¹ Other major marketing efforts aimed at capturing a larger market involve novel flavorings and technology.^{24,25,32} Other themes have included appealing to the needs for freedom or altering perceptions of e-cigarettes as sophisticated or sexy.^{25,31}

The media channels used to promote e-cigarettes are also important indicators of the target market, such that TV advertising might be less targeted and have broad reach depending on the station and time the ads are aired. Moreover, the types of marketing channels used may be an indication of the level of resources a company has to allocate to marketing its brand and on what scale (eg, national, local). One study suggested that e-cigarette advertising

expenditures were highest in magazines and TV and lowest in newspapers and online.³³ However, these expenditures may be more associated with the cost of accessing these channels than the actual reach of these channels, as online advertising is relatively inexpensive.^{34,35}

The marketing strategies used to promote e-cigarettes may be influenced by traditional tobacco industry's involvement in specific e-cigarette brands. The most popular brands of e-cigarettes during their emergence in the US market had varying connections to the tobacco industry. One of the earliest e-cigarette brands introduced in the US was Njoy, which was founded by Mark Weiss in 2006 and has maintained independence from the traditional tobacco industry. Another prominent e-cigarette brand, Blu, was initially independent from the tobacco industry but was acquired by Lorillard Tobacco Company in 2012. Subsequently, as part of a merger between RJ Reynolds and Lorillard announced in 2014 and executed in 2015, Blu was divested to Imperial Tobacco. Two other e-cigarette brands were launched more recently by traditional tobacco companies. Vuse was launched by RJ Reynolds Vapor Company in 2013. Altria Group (renamed from Philip Morris) launched MarkTen later that year.

The growing involvement of the tobacco industry in the e-cigarette market has been flagged as a major reason why policymakers should restrict their marketing activities and not condone their use.³⁶ The current study examined the differential media channels and advertising messaging strategies used by these 4 major e-cigarette companies (ie, Njoy, Blu, Vuse, MarkTen) from 2013 to 2015. Given their distinct histories in relation to the traditional tobacco industry, these findings may give insight into how tobacco company ownership affects e-cigarette brand marketing, which in turn, may help to guide policymakers seeking to constrain these marketing activities.

METHODS

Data Source

Data for this study were purchased from Competitrack, a media spend tracking company that tracks over 2600 English language media outlets in the US. Competitrack tracks print ads in newspapers, magazines, and newspaper-distributed free-standing inserts. Cost estimates are assigned to each ad based on discounts from published rates. For TV and radio, programming is recorded and manually reviewed by staff and categorized into an industry. A defined classification system is used to code the advertiser, unique creative code, station, market, time, and program. Cost estimates are assigned based on Nielsen ratings and SQUAD local cost. Online displays are recorded using proprietary Web indexing technology through a set of top ad-supported websites (eg, Amazon.com, The Onion, TMZ, WebMD). Competitrack also monitors 100 leading online video sites (eg, Hulu, HowStuffWorks) that are coded through manual review. Online display and video spending estimates are based on the impression data obtained by the Web-indexing technology (ie, programs that search websites to retrieve accessible webpages for indexing), audience measurement data from comScore, and estimated cost per thousand impressions for each monitored site.

Procedures

We conducted a mixed-methods study regarding e-cigarette adspend (ie, the amount of money spent on advertising for a product or activity), adspend per media channel, and messaging strategies among these top e-cigarette brands. The sampling frame included all data regarding advertising of Njoy, Blu, Vuse, and MarkTen from January 2013 through December 2015. This time frame was selected because of the relevance of the e-cigarette market that emerged in 2013 to the most recent year. These 4 brands were selected because they had the highest adspend and advertising activity overall and had distinct histories with the traditional tobacco industry. Print ad content was thematically reflective of TV commercial ad content; thus, print ads were the focus of qualitative data analysis regarding messaging content.

Data Analysis

Quantitative data were analyzed using SAS 9.4.³⁷ Descriptive statistics were calculated for total e-cigarette adspend per month in total and by brand over time; adspend by brand was compared using bivariate analyses (ie, ANOVA). Statistical significance was set at $\alpha = .05$. All print ads from each of these companies during this period were imported into MAXQDA 12.³⁸ Four members of the authorship team (2 trained MPH-level and 2 PhD-level study personnel) randomly selected 25% of the ads, which they then used to generate preliminary codes using deductive and inductive coding methods. All codes were compiled and developed into a codebook for analysis. Primary (ie, major topics) and secondary codes (ie, recurrent themes within primary topics) were established. Then, each ad was analyzed fully and independently by 2 trained MPH-level study personnel and coded using the preliminary codebook that was developed. All new codes that arose during coding were added to the codebook and applied to all ads. Codes were compared, and consensus for coding was reached (Kappa = 93.3%). Themes were compared and contrasted across brands.

RESULTS

Adspend

Njoy demonstrated substantial adspend until early 2014 (Figure 1a). Blu had the most consistent spending until mid-2015, which may reflect disruption during the divestment to Imperial Tobacco. Vuse spent much less until mid-2014 and has continued to spend less through the end of 2015 (with interruptions mid-2015). MarkTen demonstrated significant spending for about one year after it entered the market in 2014 but spent little to no money on e-cigarette advertising since spring 2015. In comparison to these e-cigarette brands, the combined spending of all other e-cigarette brands fluctuated more in 2013 and then became relatively stable (ranging from \$500,000 to \$1 million). Overall adspend among the 4 companies was significantly different ($p < .001$).

Media Channels

During 2013 and early 2014, Njoy allocated the largest proportion of their spending to TV, followed by print and online (Figure 1b). Njoy had a spike in adspend in early 2014 (coinciding with the 2014 Superbowl), but then spending decreased significantly. Blu

allocated most of its money to print advertisement followed by TV, with little online (Figure 1c). Vuse consistently allocated its highest proportion on TV since mid-2014 and has allocated larger proportions of its adspend to online marketing than Blu and MarkTen (Figure 1d). MarkTen focused almost all of its adspend on print ads with no money spent on TV ads and little allocated to online marketing (Figure 1e). Adspend by media channel among the 4 companies was significantly different ($p < .001$).

Advertisement Messaging Strategies

Table 1 provides a description of the ads used by each brand from 2013 to 2015, and Table 2 provides representative samples from each year across the 4 brands. Regarding product characteristics highlighted in ads, flavors were the most commonly highlighted, with Njoy, Blu, and Vuse having a particular focus on flavors. Rechargeability was also prominent, particularly with Blu. Little focus was placed on nicotine content. Interestingly, only MarkTen featured warning labels regarding the health risks associated with use of the product, contraindications of use, and the addictive nature of nicotine, and the lack of evidence of efficacy for smoking cessation. Only 20 of the 84 ads (23.8%) included images of people, with Blu and MarkTen being the only brands to feature people. Blu depicted a high proportion of Whites and middle-aged adults, whereas MarkTen featured a higher proportion of young adults. Blu was the only brand to use celebrities in their ads. Regarding ad settings, 58 (69.0%) showed the product in isolation, with an additional 11 (13.1%) showing only a hand or finger alongside the product. Of those ads with a setting indicated ($N = 15$), 8 appeared to be in a club or lounge or at a party. Regarding themes, the most dominant themes were being an alternative to smoking, particularly among Njoy and Blu, and innovation or technology, particularly among Vuse and MarkTen. Blu had prominent focuses on satisfaction, freedom, circumventing smoke-free policies, and no ash or smoke from the device. Njoy and Blu used bright colors for the majority of ads, whereas MarkTen largely relied on black-and-white ads. Only a small proportion included links to their websites or social media pages (38.1% and 3.6%, respectively).

DISCUSSION

This study is the first to examine differing approaches to e-cigarette advertising during the emergence of e-cigarettes in the US with a particular focus on the brands' affiliations with the traditional tobacco industry. Trends in adspend over time changed dramatically in general and by brand. Moreover, the media channels and messaging strategies among the brands were distinct. The differential strategies have resulted in different outcomes for each brand; as of 2015, Vuse had 34% of market share of e-cigarettes, Blu had 24%, and MarkTen and Njoy each had 5%.³⁹

The 2 companies with the largest adspend in 2013 were those already with a substantial market share – Njoy and Blu.⁴⁰ However, the higher market share of Blu and Vuse in 2015 as compared with Njoy and MarkTen may have been driven by their higher adspend into 2015. Regarding adspend strategy, whereas Blu and MarkTen prioritized print during the time-period covered in this study, Njoy and Vuse allocated a significant proportion of adspend to TV advertising. Of note, the Vuse ads were the first RJ Reynolds TV ads of any

kind since 1970.⁴¹ It is noteworthy that a sizeable proportion of adspend was allocated to advertising toward a large, national market via TV and print across all 4 brands, much the same as the traditional tobacco industry's goals to promote cigarette brands in these larger markets, despite Njoy's independence from the tobacco industry. Additional research is needed to understand the messaging strategies used in social media and how those efforts target specific markets.

Regarding messaging strategies, the proportion of Njoy's ads that included health-oriented anti-smoking messages, specifically e-cigarettes as an alternative to smoking, was higher than that of other brands. This may reflect their intent to acquire the cigarette smoking population as consumers, as well as hesitation from the other brands to leverage this message at the risk of cannibalizing their parent company's market on cigarettes. Moreover, it is interesting to note that MarkTen ads include health warning labels, whereas other brands do not. This may be an indicator of concern about future litigation or a strategy to suggest that e-cigarettes are not necessarily less hazardous than tobacco cigarettes by highlighting potential health harms of e-cigarettes.

Vuse and MarkTen also had a focus on technology in their ads, which may be a reflection of the time period within which they entered the market and were in competition with not only brands like Njoy and Blu, but also products present in vape shops and online that bolstered advanced technology during the emergence of second generation e-cigarettes, which were usually larger than the first generation and had attributes including longer battery life, rechargeability, and refillable tanks. Historically, the companies owning these 2 brands also have been effective in their efforts to promote advances in their products (eg, "light" cigarettes). Moreover, Blu had a high proportion of ads indicating rechargeability, which may reflect their intention to highlight this technological advancement within their product offerings. Thus, technology seems to be an important attribute related to e-cigarette marketing.

Blu used a wide range of messaging strategies, with a substantial proportion focused on freedom and circumventing smoke-free policies as well as satisfaction. The term "satisfaction" may be used implicitly to indicate satisfying nicotine addiction, which is particularly likely given Blu's entangled history with traditional tobacco. Blu and MarkTen also focused more on the human or social experience in their ads, with a greater proportion of ads including people, particularly within a party or club setting. Blu had a high proportion of ads that included men, highlighted masculinity, and focused on middle-aged adults. MarkTen had a higher proportion of ads including women versus men and young adults. These distinctions are difficult to interpret but indicate different target markets.

Overall, several of these marketing strategies appeal to youth and young adults. In particular, using social media and new technology as marketing channels and using messaging that highlights flavors, technology, and use in bars, clubs, and social settings seem strategically leveraged toward capturing the youth and young adult markets.

The current study was limited by a small number of ads available, which precluded the use of advanced analyses in ascertaining significant differences. However, descriptive analyses

indicated notable trends within each company, and we were able to document significantly different adspend among the brands overall and across media channels.

In conclusion, although many of the strategies used by these brands seem to be related to their historical affiliations with traditional tobacco companies and the historical context of the emergence of their products, many other differences in approach cannot be attributed to differing links to traditional tobacco industry. However, these findings suggest that the approaches to marketing e-cigarettes are not independent from the brands' affiliations with the tobacco industry. With the bankruptcy of Njoy⁴² and with continued interest of the tobacco industry to be key players in the e-cigarette industry, the continued monitoring of marketing efforts, particularly differential efforts by those companies with and without a traditional tobacco industry affiliation, are critical in informing regulation and enforcement of regulation. This is highly relevant as the new FDA regulatory actions go into effect in the next 3 years, with regulations regarding health warning labels and regarding health- and cessation-related claims, among others. Going forward, regulatory efforts must continue to consider how these companies will be overseen in the era of continued diversification of nicotine delivery products in terms of their product development and promotion and as the research regarding the implications of e-cigarettes continues to develop, particularly with a range of potentially conflicting findings.

IMPLICATIONS FOR TOBACCO REGULATION

Our findings highlight that e-cigarette marketing approaches may be related to the brands' affiliations with the tobacco industry. This suggests that regulatory efforts should consider how these companies will be overseen in the era of continued diversification of nicotine delivery products in terms of their product development and promotion.²²⁹

Acknowledgments

This work was supported by the National Cancer Institute (1R21CA198455-01, PI: Berg; U01CA154282-01, PI: Kegler).

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Figure 1.
Adspend per Month and by Media Channel by Brand over Time, 2013–2015

Table 1

Njoy, Blu, Vuse, and MarkTen E-Cigarette Advertisement Characteristics, 2013–2015 (Total N = 84)

	Total ads N = 84		Njoy ads N = 21 (25.0%)		Blu ads N = 28 (33.3%)		Vuse ads N = 11 (13.1%)		MarkTen ads N = 24 (28.6%)	
	N (%)	N (%)	N (%)	N (%)	N (%)	N (%)	N (%)	N (%)	N (%)	N (%)
Year										
2013	25 (29.8)	10 (47.6)	8 (28.6)	4 (36.4)	3 (12.5)					
2014	27 (32.1)	6 (28.6)	7 (25.0)	4 (36.4)	10 (41.7)					
2015	32 (38.1)	5 (23.8)	13 (46.4)	3 (27.3)	11 (45.8)					
Product characteristics										
Flavors	40 (47.6)	16 (76.2)	14 (50.0)	5 (45.5)	5 (20.8)					
Rechargeable	18 (21.4)	1 (4.8)	12 (42.9)	0 (0.0)	5 (20.8)					
Disposable	4 (4.8)	0 (0.0)	4 (14.3)	0 (0.0)	0 (0.0)					
Tank/no tank	9 (10.7)	0 (0.0)	9 (32.1)	0 (0.0)	0 (0.0)					
Nicotine content	3 (3.6)	1 (4.8)	0 (0.0)	0 (0.0)	2 (8.3)					
Health warning label	21 (25.0)	0 (0.0)	0 (0.0)	0 (0.0)	21 (87.5)					
People										
No person/people	64 (76.2)	21 (100.0)	14 (50.0)	11 (100.0)	18 (75.0)					
Number of people										
Single person	16 (19.0)	0 (0.0)	13 (46.4)	0 (0.0)	3 (12.5)					
Dyad	4 (4.8)	0 (0.0)	1 (3.6)	0 (0.0)	3 (12.5)					
Sex										
Male only	14 (16.7)	0 (0.0)	12 (42.9)	0 (0.0)	2 (8.3)					
Female only	5 (6.0)	0 (0.0)	1 (3.6)	0 (0.0)	4 (16.7)					
Mixed	1 (1.2)	0 (0.0)	1 (3.6)	0 (0.0)	0 (0.0)					
Race										

	Total ads N = 84	Njoy ads N = 21 (25.0%)	Blu ads N = 28 (33.3%)	Vuse ads N = 11 (13.1%)	MarkTen ads N = 24 (28.6%)
	N (%)	N (%)	N (%)	N (%)	N (%)
White	12 (14.3)	0 (0.0)	12 (42.9)	0 (0.0)	0 (0.0)
Black	1 (1.2)	0 (0.0)	0 (0.0)	0 (0.0)	1 (4.2)
Ambiguous	7 (8.3)	0 (0.0)	2 (7.1)	0 (0.0)	5 (20.8)
Age groups shown					
Young adults (18–34)	6 (7.1)	0 (0.0)	2 (7.1)	0 (0.0)	4 (16.7)
Middle-aged adults (35–50)	13 (15.5)	0 (0.0)	12 (42.9)	0 (0.0)	1 (4.2)
Older adults (>50)	1 (1.2)	0 (0.0)	0 (0.0)	0 (0.0)	1 (4.2)
Celebrity					
No	18 (21.4)	0 (0.0)	12 (42.9)	0 (0.0)	6 (25.0)
Actor/actress	2 (2.4)	0 (0.0)	2 (7.1)	0 (0.0)	0 (0.0)
Setting/Topic					
Product only	58 (69.0)	17 (33.3)	13 (46.4)	11 (100.0)	17 (70.8)
Hand/finger	11 (13.1)	10 (47.6)	0 (0.0)	0 (0.0)	1 (4.2)
Ambiguous	5 (6.0)	0 (0.0)	5 (8.6)	0 (0.0)	0 (0.0)
Party/club/lounge	8 (9.5)	1 (4.7)	3 (10.7)	0 (0.0)	4 (16.7)
Car	4 (4.8)	0 (0.0)	4 (14.3)	0 (0.0)	0 (0.0)
Sports	1 (1.2)	0 (0.0)	1 (3.6)	0 (0.0)	0 (0.0)
Nature	2 (2.4)	0 (0.0)	0 (0.0)	0 (0.0)	2 (8.3)
Coincide with event (eg. Super bowl)	3 (3.6)	2 (9.5)	1 (3.6)	0 (0.0)	0 (0.0)
Theme					
Alternative to cigarettes	12 (14.3)	6 (28.6)	6 (21.4)	0 (0.0)	0 (0.0)
Innovation/technology	13 (15.5)	1 (4.7)	2 (7.1)	4 (33.3)	6 (25.0)
No ash/no smoke	10 (11.9)	1 (4.7)	9 (32.1)	0 (0.0)	0 (0.0)
Satisfaction	12 (14.3)	1 (4.7)	11 (39.3)	0 (0.0)	0 (0.0)
Freedom	4 (4.8)	0 (0.0)	4 (14.3)	0 (0.0)	0 (0.0)

	Total ads N = 84	Njoy ads N = 21 (25.0%)	Blu ads N = 28 (33.3%)	Vuse ads N = 11 (13.1%)	MarkTen ads N = 24 (28.6%)
	N (%)	N (%)	N (%)	N (%)	N (%)
Circumventing smoke-free policies	6 (7.1)	1 (4.7)	5 (17.9)	0 (0.0)	0 (0.0)
Taste	6 (7.1)	1 (4.7)	0 (0.0)	2 (16.7)	3 (12.5)
Romantic or erotic content	2 (2.4)	1 (4.7)	1 (3.6)	0 (0.0)	0 (0.0)
Masculinity	4 (4.8)	0 (0.0)	3 (10.7)	0 (0.0)	1 (4.2)
Sociability	4 (4.8)	0 (0.0)	1 (3.6)	0 (0.0)	3 (12.5)
Price	1 (1.2)	0 (0.0)	1 (3.6)	0 (0.0)	0 (0.0)
Color scheme					
Bright colors	46 (54.8)	13 (61.9)	23 (82.1)	4 (36.4)	6 (25.0)
Black and white mostly	38 (45.2)	8 (38.1)	5 (17.9)	7 (63.6)	18 (75.0)
External links					
Links to their website	32 (38.1)	10 (47.6)	17 (60.7)	0 (0.0)	5 (20.8)
Links to social media pages	3 (3.6)	2 (9.5)	1 (3.6)	0 (0.0)	0 (0.0)

Table 2

Example Njoy, Blu, Vuse, and MarkTen Advertisements across Time, 2013 through 2015

	Njoy	Blu	Vuse	MarkTen
2013				
2014				
2015				