

E-cigarette Advertising
Spending in the United States,
2015 to 2019

Presenter: Kevin Welding, PhD

Background

E-cigarette product sales and use have increased in the US over the past decade and are likely influenced by advertising. Understanding trends in e-cigarette ad spending, media channels and target markets can inform tobacco regulatory science.

Methods

- E-cigarette ad spending from 2015 to 2019 was purchased from Numerator, a market research firm.
- Data provided included advertiser, run date, ad spend, occurrences, market and media type (online/mobile, print, radio, television).

Main Results

- Out of 583,547 **ad occurrences**, 23,172 (4%) were placed in 2015, 19,855 (3%) in 2016, 14,895 (3%) in 2017, 116,769 (20%) in 2018, and 408,856 (70%) in 2019.
- Total **ad spend** during the 5-year period was \$405 million (m).
 - \$36m (9%) in 2015
 - \$39m (10%) in 2016
 - \$29m (7%) in 2017
 - \$85m (21%) in 2018
 - \$215m (53%) in 2019
- There were 83 total **advertisers** in the sample, with Juul (48%), Vuse (21%), and blu (15%) accounting for 84% of ad spending.

Ad occurrences and advertising **spending**
for e-cigarettes increased during 2015-2019,
with **JUUL** leading the way. Spending in
specific markets became less concentrated
in NYC and there was a shift towards the
south and west.

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- Top 5 markets** by spending (excluding national ads)
 - 2015:** NYC (49%), Boston (13%), Miami (10%), Detroit (6%) and Chicago (5%)
 - 2019:** Los Angeles (7%), NYC (6%), Washington, DC (5%), Houston (5%) and Dallas (5%)
 - The spending in the top 5 markets in 2015 is spread across 29 markets in 2019.
- Media Types**
 - E-cigarette ad occurrences were concentrated on radio (84%) and TV (9%), but print ad occurrences (1%) accounted for 58% of all ad spending.
 - Online and mobile ads peaked in 2017, accounting for 26% of ads, but comprised only 4% of placements in 2019.
 - TV ads accounted for at least one-third of ad placements until 2018, when radio ads became the most prominent channel with 89% of the ads in 2018 and 2019. In those two years, companies still spent more on TV ads (\$58m) than radio ads (\$46m).

Limitations: Numerator may not capture all e-cigarette ads, such as all branded promotions on social media channels.

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