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

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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).