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Marketing strategies in business-to-business advertisements for oral nicotine products

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ABSTRACT

Introduction Although the popularity of oral nicotine products (ONPs) such as ZYN and On! is growing globally, there is limited research on their marketing and advertising. This report describes recent ONP marketing communication to retailers. Promotion to retailers can provide insight into new product flavours and styles, as well as future marketing strategies targeting consumers.

Methods We obtained all unique ONP print and online advertisements (ads) (N=50) targeted towards US businesses between January 2016 and August 2022 from Vivvix (formerly Numerator Ad Intel). Two independent reviewers coded for type of ONP, brand, nicotine strength(s), flavour(s), slogan(s), claim(s) and frequency of each component.

Results Most ads featured nicotine pouches alone (52%), while 22% featured a mix of ONPs including pouches, tablets and lozenges. By brand, Rogue constituted 36% of ads, followed by Zyn and On! (16% each). Most (82%) ads featured at least one cooling flavour and 48% displayed at least one fruit flavour. Wintergreen flavour appeared most frequently (48%). Most (72%) ads contained a slogan, which frequently highlighted convenience of use (eg, '*Chew on this Anywhere... Anytime*'), bypassing current restrictions on other tobacco and nicotine products use (eg, '*Laughs at no smoking signs*') and highlighting big profit margins from sales of ONPs for retailers (eg, '*small pouches big margins*').

Conclusion This analysis provides insight into tobacco companies' strategies for increasing ONP endorsement among retailers. Strategies include appealing to profitability, emphasising convenience of product use and primarily promoting non-tobacco flavours. These findings highlight new trends in ONP products and marketing tactics and identify important areas to monitor to inform tobacco marketing regulations.

INTRODUCTION

Oral nicotine products (ONPs) are an emerging group of non-combustible, commercially available nicotine products currently including nicotine pouches, tablets, lozenges, gum, gummies and toothpicks. ONPs are distinct from pharmaceutical nicotine replacement products and not approved for smoking cessation. They typically do not contain tobacco leaf and have been marketed as being 'tobacco-free', which sets them apart from traditional smokeless tobacco, such as moist or dry snuff, and chewed leaves or plugs.^{1,2} First introduced in the USA in 2014, the ONP market has grown rapidly exceeding US\$200 million in

WHAT IS ALREADY KNOWN ON THIS SUBJECT

- ⇒ Oral Nicotine products (ONPs) are rapidly gaining popularity in the United States.
- ⇒ Tobacco and Nicotine product advertisements influence product popularity and use.

WHAT IMPORTANT GAPS IN KNOWLEDGE EXIST ON THIS TOPIC

- ⇒ Ads targeted to consumers have been researched but limited knowledge exists on ads targeted to retailers.
- ⇒ Less is known about ad components of ONPs used by tobacco industry to attract retailers.

WHAT THIS PAPER ADDS

- ⇒ This report highlights the promotional content of ONP advertisements to businesses, which may provide insight into new products and future consumer marketing strategies.

sales in 2020.³ The promotion of ONPs targeting consumers has been studied previously, finding that marketing components of ONP advertisements (ads), such as flavours and nicotine concentrations, may influence harm perceptions and the likelihood of use among youth and adults.^{4,5} Companies also promote ONPs to nicotine and tobacco retailers to encourage them to sell ONPs in their stores. Business-to-business ads provide insight into the products, styles and flavours that are of importance to ONP companies. In addition, previous studies have shown that tobacco product retailers may form opinions about products based on their own marketing exposures, and their opinions can potentially influence consumer perceptions.^{6,7} With the growing category and popularity of ONPs, it is important to evaluate the marketing strategies used to entice retailers to sell these products. Furthermore, evaluating brands that are more actively advertising to retailers compared with others may help in providing useful insight into future market trends. This collective information may inform regulatory actions regarding the marketing and ads of ONPs targeting businesses. The purpose of this study was to identify common business-to-business advertising and marketing strategies from several brands of ONPs.

METHODS

We obtained all unique print and online ONP ads targeted towards US businesses between 1 January

2016 and 30 August 2022 (N=73) from Vivvix (formerly Numerator Ad Intel). Although many ONPs did not launch nationally in the US market until later (eg, 2019 for Zyn and Velo nicotine pouches), Vivvix began monitoring advertising of ONPs in 2016 and captured initial ONP advertising expenditures that year. Ads were defined by Vivvix as being targeted towards businesses if the outlet in which they appeared targeted businesses (eg, ONP ads in Convenience Store News magazine). Online ads were static image ads on websites, such as website banners, that were within Vivvix's network of 4000 websites, and which were determined by Vivvix to be trade/business property in nature.

Ads containing nicotine pouches, tablets, gums, lozenges, toothpicks and long-cut, tobacco-free (dip) smokeless products were included in the analysis. After removing ads for e-cigarettes (n=18), cigarette filters (n=1), non-nicotine herbal snuff (n=3), herbal and non-nicotine pouches (n=1), N=50 unique ads containing ONPs were coded independently by two reviewers (with Cohen's kappa value of 0.83; near perfect agreement^{8 9}) using a predesigned protocol.¹⁰ Any code discrepancies were resolved by discussion among reviewers and the coauthors if needed. Ads were reviewed for the following ad components: brand, type of product(s) featured (eg, nicotine pouches, lozenges, gum), nicotine concentration(s) (eg, 2 mg, 3 mg, 4 mg), flavour(s) (eg, wintergreen, citrus, berry), claim(s) (eg, spit-free, tobacco-free), theme(s) (eg, profitability for retailers, convenience, freedom) and the presence of headlines or slogans (yes/no). All coded claims and themes categories are shown in online supplemental table 1.

RESULTS

Nicotine pouches were the most prevalent ONP promoted. Nicotine pouches only (ie, not cross-promoted with other ONPs) were featured in 26 ads (52%). Other ONPs only (nicotine tablets, gums or lozenges without pouches) were featured in 13 ads (26%) whereas nicotine pouches along with other ONPs were featured in 11 ads (22%), including 2 ads featuring long-cut tobacco-free nicotine-containing dip. A detailed account of all products included in the analysis is presented in table 1. More than half (n=32; 64%) of ads featured two or more nicotine strengths with products ranging from 3 mg to 12 mg. The brand Rogue constituted 36% of ads followed by Zyn and On! (16% each). Most (n=41; 82%) ads featured at least one cooling flavour such as wintergreen, menthol, mint or ice and 48% (n=24) displayed at least one fruit flavour such as strawberry, banana or citrus. Wintergreen flavour appeared most frequently, in 48% (n=24) of ads.

Slogans or headlines were used in most (72%; n=36) ads, as shown in online supplemental table 1, some ads included themes that highlighted the advantages and convenience of ONP use (24%, n=12; eg, 'Enjoyment by your side'; 'Chew on this Anywhere... Anytime') or profitability of ONPs for retailers (36%, n=18; eg, 'small pouches big margins', 'We're proud to be charging ahead with you', and 'carried by most major distributors'). Some (6%, n=3) also included statements that were related to circumventing restrictions on other tobacco products, like cigarettes and e-cigarettes (also see online supplemental figure 1). For example, 'For everywhere you can't smoke

Table 1 Characteristics of business-to-business oral nicotine product (ONP) advertisements (ads) (N=50)

ONP brand	Ad type	n (%)	Product type(s)	Nicotine strength(s)	Cooling flavour(s)	Fruit flavour(s)	Other flavour(s)/ unflavoured
Rogue	Print	13 (26%)	Nicotine pouches, gum, lozenges, tablets	2 mg, 3 mg, 4 mg, 6 mg	Peppermint, wintergreen	Citrus, mango, berry, lemon, fruit flavours*	Tobacco, honey
	Online	5 (10%)	Nicotine pouches, gum, lozenges, tablets, unspecified†	3 mg, 6 mg	Peppermint	Mango, lemon	
Zyn	Print	7 (14%)	Nicotine pouches	3 mg, 6 mg	Cool mint, wintergreen, peppermint, spearmint, chill, menthol	Citrus	Cinnamon, coffee, smooth‡
	Online	1 (2%)	Nicotine pouches	3 mg, 6 mg	Chill	–	Smooth‡
On!	Print	5 (10%)	Nicotine pouches	2 mg, 4 mg, 8 mg	Wintergreen, mint	Citrus	Cinnamon, coffee
	Online	3 (6%)	Nicotine pouches	Unspecified	Mint	–	–
Velo	Print	3 (6%)	Nicotine pouches, lozenges	4 mg, 7 mg	Mint, dark mint, spearmint, wintergreen	Berry, dragon fruit, citrus	Crema
	Online	1 (2%)	Nicotine pouches	Unspecified	Unspecified	–	–
NIIN	Print	2 (4%)	Synthetic pouches	3 mg, 6 mg	Spearmint, wintergreen, cool mint, citrus chill	–	Cinnamon
Black Buffalo	Print	2 (4%)	Nicotine pouches, long-cut dip	Unspecified	Wintergreen, mint	Blood orange, Peach	Straight
Pouches	Print	2 (4%)	Nicotine pouches	7 mg, 3 mg	Citrus ice, banana ice, skit ice	Strawberry banana, pineapple banana	–
FRE	Print	1 (2%)	Nicotine pouches	9 mg, 12 mg	Mint, wintergreen	–	Sweet, lush, mocha
Fully Loaded	Print	1 (2%)	Long-cut dip	Unspecified§	Wintergreen	–	–
Pixotine	Print	4 (8%)	Nicotine toothpicks	3 mg	Winter ice	–	Cinnamon, tobacco

*Fruit flavours seen as distinct flavour in addition to other specific fruit flavour names

†One online Rogue ad did not specify the type of nicotine products.

‡smooth was classified as being unflavoured

§ad mentions 'three levels of nicotine concentrations available' but no specifications provided

or vape', 'Laughs at no smoking sign', and 'Hurry, before they ban enjoyment too'. Some (24%; n=12) ads mentioned their product's popularity and growing sales with statements such as 'America's #1', 'fastest growing TF [tobacco free] dip and pouches on market', and 'fastest growing product in the market, 3X the velocity of lower strength products'. Some ads (24%, n=12) also displayed language bringing up individual rights and freedom such as, 'Find your Zyn', 'anyway you want, nicotine on demand' and 'reintroducing freedom'. Three ads (6%) made reference to FDA (U.S. Food and Drug Administration): two ads for 'pixinone nicotine toothpicks' mentioned statements such as 'FDA Registered' or 'FDA Inspected', and one ad for Black Buffalo nicotine pouches and dip mentioned 'PMTAs (Pre-Market tobacco product application) for Black Buffalo's nicotine-containing products were filed timely with FDA in September 2020, and were commercially available for sale prior to August 8, 2016'.

DISCUSSION

This analysis provides insight into tobacco companies' strategies to increase ONP endorsement among tobacco retailers. Many messages featured in ONP ads may indirectly emphasise opportunities for increasing profitability and promoting ONPs as a means to bypass current or proposed restrictions on other tobacco products, such as the federal enforcement priority against unauthorised flavoured e-cigarettes or the proposed FDA product standards to prohibit menthol in cigarettes and flavours in cigars, as well as to circumvent indoor smoking and vaping restrictions.^{11 12} Although many leading ONP brands use tobacco-derived nicotine (eg, Zyn, Velo), we found ads that highlighted the 'tobacco-free nicotine' aspect of ONPs. These 'tobacco-free nicotine' claims may lead to reduced harm perceptions and increased intentions to use ONPs, as seen in some studies.^{13 14} Using such claims along with ad slogans like 'anyway you want, nicotine on demand' highlight ease of use and potential concealability which may reflect an agenda for attracting new users, particularly youth. These features may also attract adults who want to use in places where combustible product use is prohibited (eg, indoor public places), or encourage adults to switch from combustible tobacco products to ONPs.^{15 16}

Currently, the nicotine strengths in FDA-approved NRT (Nicotine Replacement Therapy) gums, lozenges and tablets range from 2 to 4 mg¹⁷ and we found advertising of ONPs with up to 12 mg of nicotine. The availability of ONP with nicotine strengths much higher than strengths available in FDA-approved NRTs alongside retailer messaging that emphasises profitability may exacerbate the 'nicotine arms race', referring to escalating levels of nicotine concentration availability leading to an increased risk of addiction.¹⁸ The availability of varied flavour choices and nicotine strengths were apparent across most ads, which is content known to appeal to retailers.¹⁹ The choice of flavours including cooling (menthol, mint or ice) and fruit varieties for ONPs specifically may appeal to retailers who know that flavoured tobacco products sell well but are faced with increasing restrictions for other products, such as e-cigarettes, cigars and cigarettes.²⁰ Claims surrounding freedom of ONP use, statements such as 'FDA registered' or 'FDA inspected' observed in nicotine toothpick ads, and choice of flavours in pouches could be misinterpreted as products having FDA authorisation and may attract youth or adults who do not currently use other tobacco products.⁵ As of April 2022, FDA has the regulatory authority over non-tobacco (or synthetic) nicotine products and many ONPs available in the market, though not authorised by

FDA, contain non-tobacco nicotine. However, the only two ONPs with current FDA authorisation (Verve discs; Verve chews) were not observed in the analysed ads. The use of FDA-related statements without having FDA authorisation appears to be a violation of the Tobacco Control Act, which prohibits marketing to consumers that would mislead them into believing that a product is FDA approved.²¹ These business-to-business strategies may be repeated in retailers' promotions of the products to consumers. The promotion and availability of non-tobacco flavoured ONPs to consumers, in particular, should be closely monitored as these flavours are known to be appealing to young people.^{22 23}

CONCLUSION

Examining marketing of ONPs to retailers provides critical insights into the strategies used by manufacturers for promoting their products. Because the ONP landscape is changing rapidly and additional messages and strategies may have emerged after August 2022, these findings highlight the need to closely monitor business marketing to help regulate ONP marketing. For example, ads encourage retailers to promote ONPs, including non-tobacco flavoured ONPs, in response to regulations on other flavoured tobacco products. In addition to bypassing restrictions on other products, ads highlighting ONPs' ease of use, the availability of a wide variety of flavours and nicotine strengths and individual freedom claims may increase their appeal. These results may be informative for FDA's regulation of ONPs and the efforts to prevent their initiation and use by youth and people who have never used nicotine products.

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