

TERM

Tobacco Enforcement and Reporting Movement

Online Marketing of Tobacco Products: India

September 2021

Background:

Tobacco advertising, promotion and sponsorship (TAPS) promotes tobacco consumption and discourages cessation. The World Health Organization's MPOWER technical package on tobacco control and the international treaty, the Framework Convention on Tobacco Control (FCTC), recommend banning tobacco advertising, promotion and sponsorship. In India, Section 5 of the Cigarettes and Other Tobacco Products Act (COTPA) prohibits all direct and indirect advertisement of tobacco products, including activity that promotes the use of products or their trademark or brand name.

Despite this, tobacco marketing continues to be widespread in India and worldwide, particularly in online forums that are less regulated.^{i,ii,iii} Vital Strategies launched the Tobacco Enforcement and Reporting Movement (TERM) in June 2019 to monitor tobacco marketing activities.¹ This situation report is part of a monthly series that summarizes observed examples of online tobacco marketing in India. It covers the period **August 16 to Sept. 15, 2021.**²

Highlights of the Month

- **Tobacco marketing by volume:** There were 1,255 cases of tobacco marketing online this month. Of these, 76% were surrogate advertising, 11% were events, promotions and sponsorships, and 6% were direct marketing of tobacco products. Of the total observed tobacco marketing, 67% was for smoking products, 27% for smokeless products and 7% for electronic nicotine delivery systems (ENDS) products.
- **Tobacco marketing by state:** Overall, 61% of the observed marketing originated in West Bengal, followed by Uttar Pradesh (26%), Maharashtra (4%), Rajasthan (4%) and Karnataka (2%). Marketing of smoking tobacco products most often originated in West Bengal (88%), Maharashtra (4%), Rajasthan (3%) and Karnataka (3%). Marketing of smokeless tobacco products originated in Uttar Pradesh (93%) and Haryana (7%). Marketing of ENDS products mostly originated in New Delhi (32%), followed by Maharashtra (24%).
- **Tobacco marketing by channel:** Of the total observed tobacco marketing, 46% was on Facebook, 36% on Instagram and 15% on Twitter. Smoking tobacco products were marketed through Facebook (53%), Instagram (30%) and via news site (13%). Smokeless tobacco products were also marketed through Facebook (41%), Instagram (37%) and various news websites (21%). ENDS products were marketed on Instagram (100%).

¹ While this report notes instances of tobacco marketing, it does not attempt to identify nor allege violations of regulations.

² Coding was modified to include ENDS products in the scope of marketing that we monitor and report on.

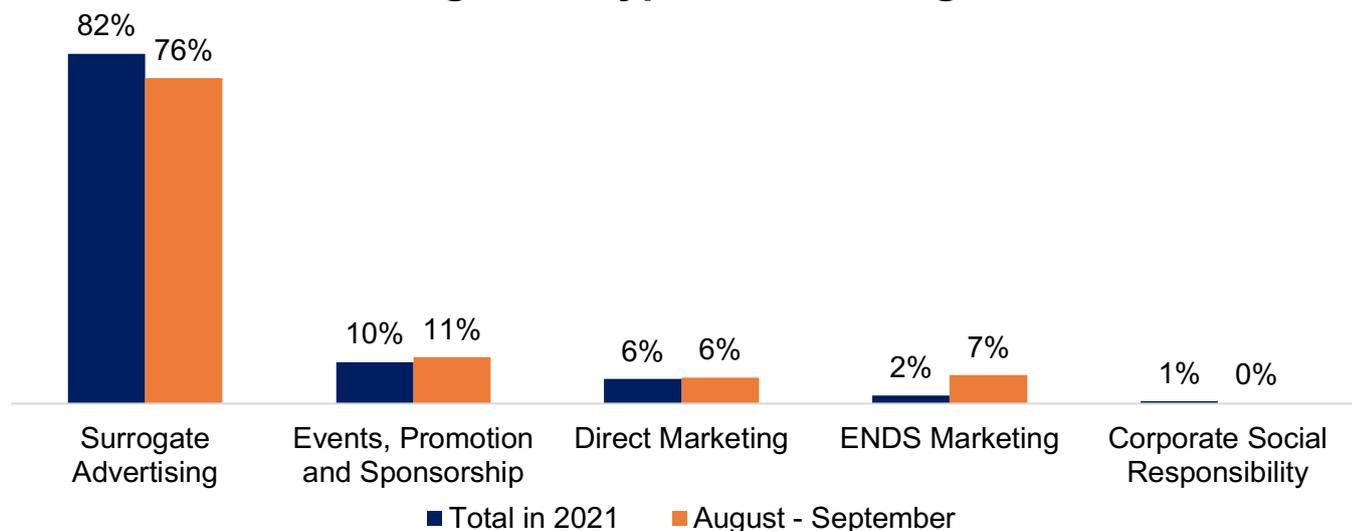
- Message framing:** Of the total observed tobacco marketing, 48% had messages related to lifestyle³ and 40% to community celebration.⁴ Both smoking and smokeless tobacco products were marketed using messages focused on lifestyle and community celebration. ENDS products were marketed more directly using stock or price updates.⁵

Detailed Insights

Volume of Tobacco Marketing

- A total of 1,255 tobacco marketing activities were recorded between Aug. 15 and Sept. 16, 2021. The main types of marketing were surrogate marketing, events, promotions and sponsorships, and direct marketing. Of the total marketing activities observed, 76% were surrogate marketing, 11% were events, promotions and sponsorships, and 6% were direct marketing.
- Of the total marketing activities observed this month, 67% were for smoking tobacco products, 27% for smokeless tobacco products and 7% for ENDS products. There was an increase in the marketing of smoking products and ENDS products this month when compared to previous months in 2021.

Figure 1. Type of Marketing



Year to Date (Dec. 16,2020 to Sep. 15, 2021) (n =7,876)

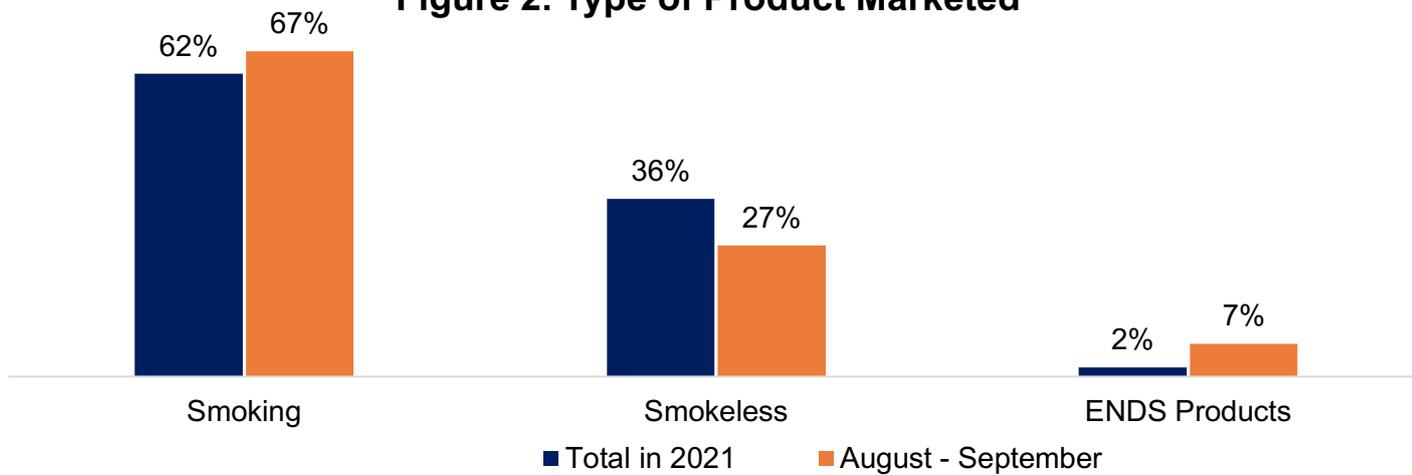
Aug. 16 to Sept. 15, 2021 (n = 1,255)

³ All marketing messages that were previously coded as recreation are now coded as lifestyle. Lifestyle: Messages that involve presenting a tobacco brand or product as aspirational and that are related to recreation and making people’s leisure time more interesting or enjoyable. Examples include: cooking, family time, playing outdoors, movies, etc.

⁴ Community celebration: Messages that involve activities that people do in their place of worship or with groups. Examples include: religious festivals, community events, sporting events, birthdays, etc.

⁵ Coding was revised to better identify the message framing used for ENDS marketing. Most of the messages that were previously being coded as non-specific framing, are now coded as “price or stock update..

Figure 2. Type of Product Marketed



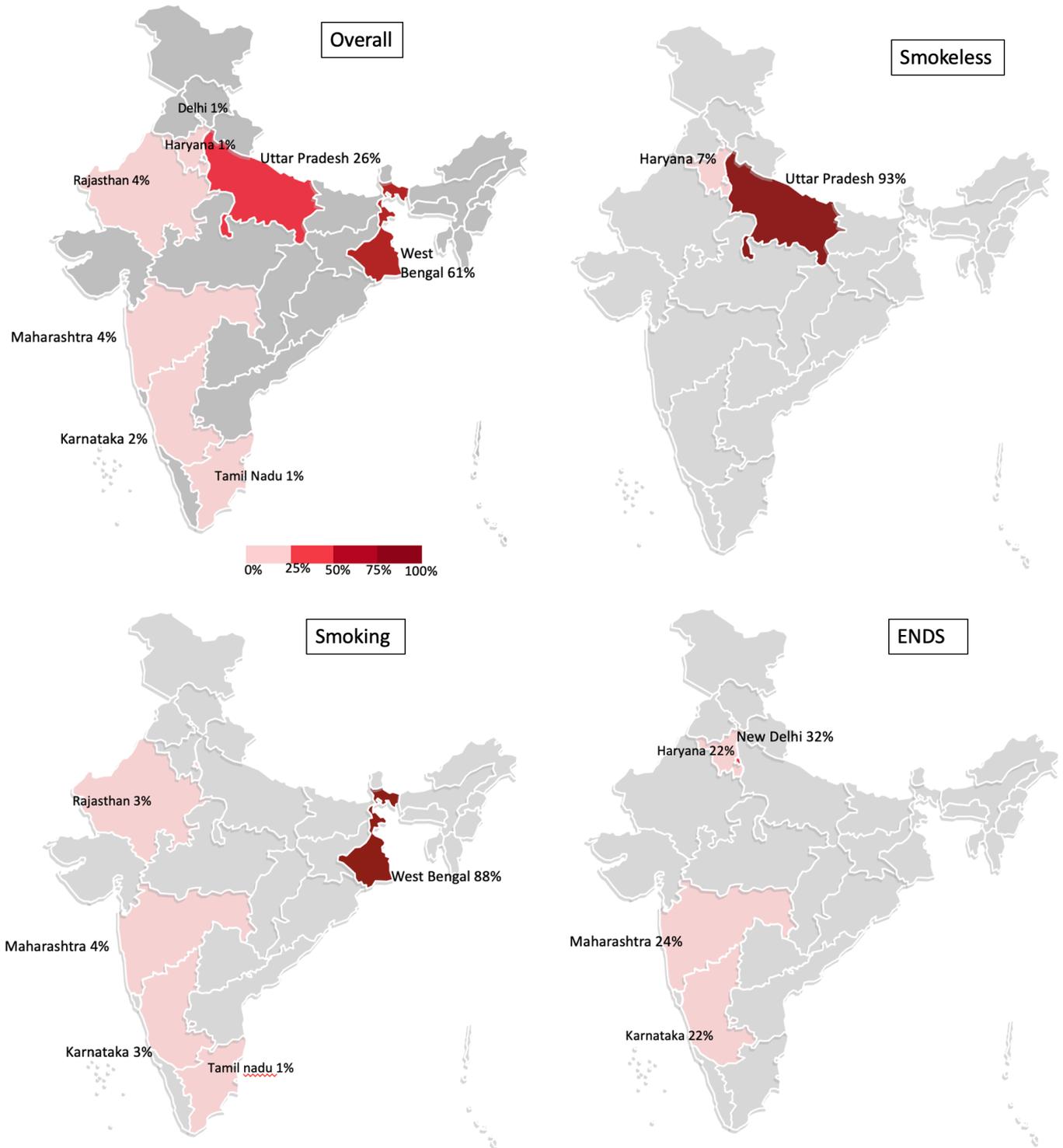
Year to Date (Dec. 16, 2020 to Sept. 15, 2021) (n = 7,876)

Aug. 16 to Sept. 15, 2021 (n = 1,255)

Tobacco Marketing by State

- The majority of tobacco marketing observed this month originated in West Bengal (61%), followed by Uttar Pradesh (26%), Maharashtra (4%) and Rajasthan (4%).
- Marketing of smoking tobacco products most often originated in West Bengal (88%), followed by Maharashtra (4%), Rajasthan (3%) and Karnataka (3%). Smokeless tobacco products were marketed in Uttar Pradesh (93%) and Haryana (7%). ENDS products were marketed in New Delhi (32%), Maharashtra (24%), Haryana (22%) and Karnataka (22%).

Map 1: Origin of Tobacco Marketing by State



Aug. 16 to Sept. 15, 2021 (n = 1,141)

Marketing Recorded August 16 to Sept. 15, 2021

Most of the tobacco marketing observed this month was indirect marketing, followed by direct marketing.

Table 1: Type of Marketing Activities

Marketing Tactics	Summary
<p>Direct Marketing</p>	<p>There were 76 instances of direct advertising recorded during this period. In many cases, cigars and bidis were directly marketed on social media, primarily via Facebook. Ads depicted the qualities of a well-made cigar and offered aspirational messaging on cigar smoking. Many posts provided details on where to order products. Posts for bidis often contained pictures of tendu leaves and bidi packs, as well as pictures depicting production, storage and retail sales with minimal or no text in the post.</p>
 <p>Make Luxury A part of Time</p>	 <p>एक अनोखा दोस्त</p> <ul style="list-style-type: none"> Quality Product Reasonable price Satisfaction Delivery on time 24/7 Support <p>www.100Numberbidi.co.in Email : sabubidi100number@gmail.com</p>
<p>Indirect Marketing (Surrogate marketing and events, promotions and sponsorships)</p>	<p>There were 1,093 instances of indirect advertising observed. Messaging highlighted tobacco features including flavor and packaging. Event, promotion and sponsorship activities were timed with observances and national religious festivals such as Janmashtami and Ganesh Chaturthi, as well as national and international sporting events.</p>
 <p>YOUR PERFECT SHOT FOR REFRESHMENT</p> <p>कमला पसन्दा पान मसाला</p>	<p>ICC T20 WC: Disney+ Hotstar ropes in four sponsors, targets platform reach of 200-230 mn</p> <p>Dream11, Vimal Pan Masala, CoinSwitch, and BharatPe have come on-board as sponsors</p> <p>by Javed Farooqui Updated: Aug 16, 2021 8:39 AM</p>  <p>Star India-owned video streaming platform Disney+ Hotstar has roped in four sponsors for the upcoming ICC T20 World Cup 2021 almost two months before the tournament kicks off. Dream11, Vimal Pan Masala, CoinSwitch, and BharatPe have come on-board as sponsors.</p>

<p>Corporate Social Responsibility Activities</p>	<p>There were 2 observed instances of tobacco companies conducting social responsibility activities, the majority of which were by ITC Limited. Messaging was primarily focused on social initiatives and corporate governance.</p>
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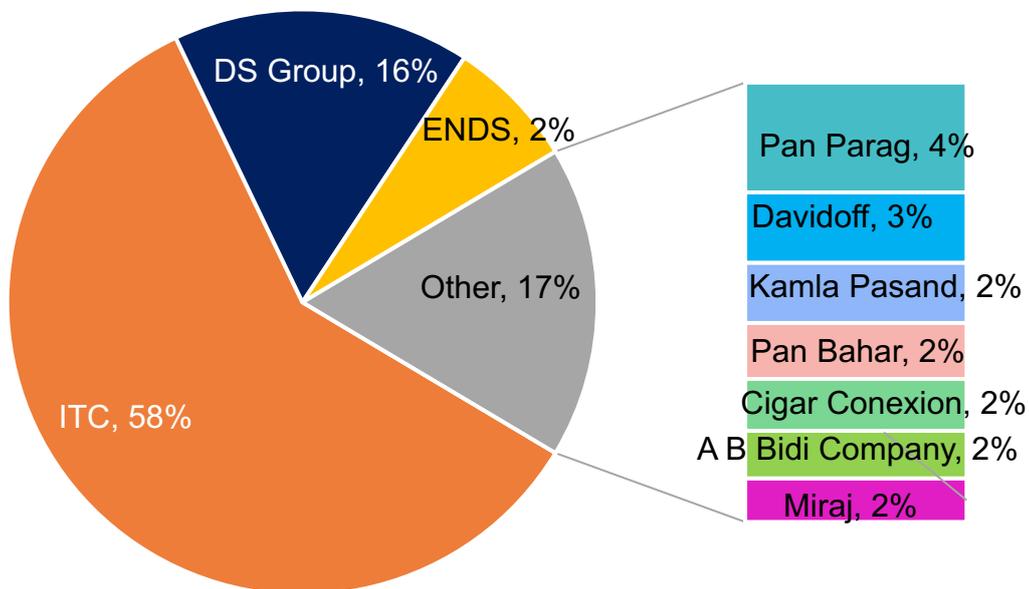
<p>ENDS Marketing</p>	<p>There were 84 instances of ENDS products being marketed, primarily via Instagram. In many cases, posts included product specifications emphasizing ease of use (e.g., pre-filled, pre-charged) and giving stock updates.</p>
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Marketing by Tobacco Companies

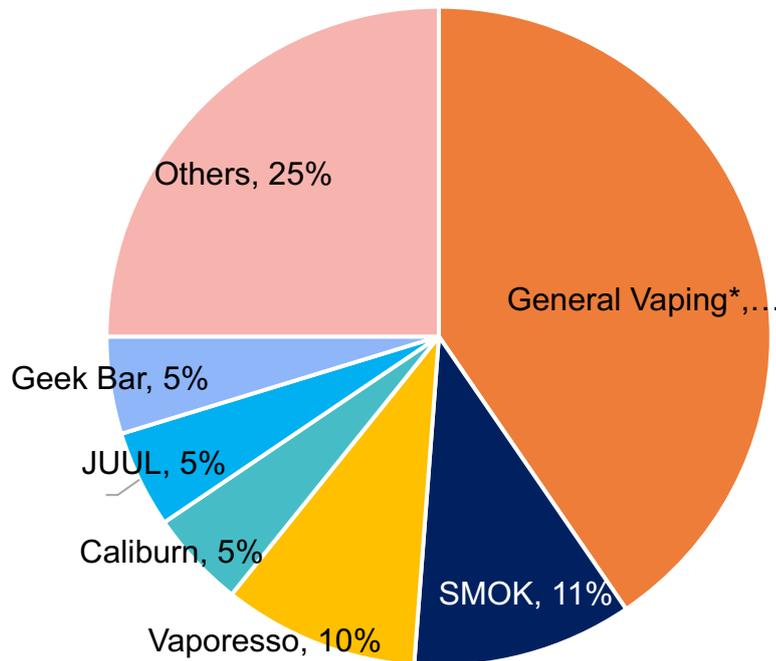
- The majority of marketing observed this month was sponsored by ITC Limited (58%). Other chief sponsors of tobacco marketing were: Dharampal Satyapal Group (16%), Pan Parag (4%) and Davidoff (3%).
- Most of the surrogate advertising observed this month was sponsored by ITC Limited (49%), while 13% was sponsored by Dharampal Satyapal Group (DS Group).
- Most of the marketing of ENDS products observed this month was conducted by SMOK (11%), followed by Vapresso (10%).

Figure 3a : Total Marketing by Tobacco Company (All Products)



Aug. 16 to Sept. 15, 2021 (n = 1,255)

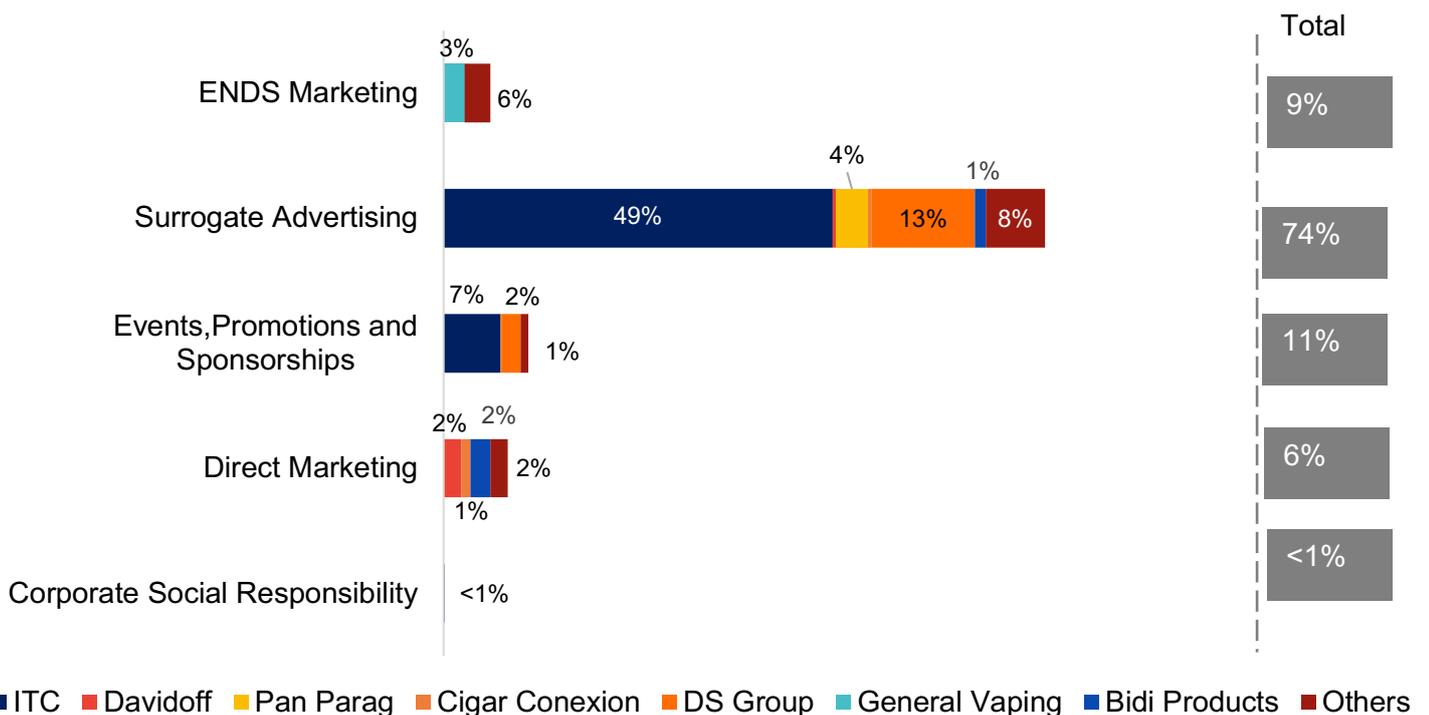
Figure 3b : Total Marketing by Tobacco Company (ENDS)



Aug. 16 to Sept. 15, 2021 (n = 84)

*General vaping refers to those ENDS products which are marketed directly but without any brand names.

Figure 4. Type of Marketing by Company



Aug 16 to Sept. 15, 2021 (n = 1255)

*This month bidi products contributed to 2% of direct marketing and 1% of surrogate advertising. The share of each bidi brand was very low and was combined together under "bidi product."

Public Engagement Activities

Public engagements, including corporate social responsibility activities, that were observed this month are depicted below.

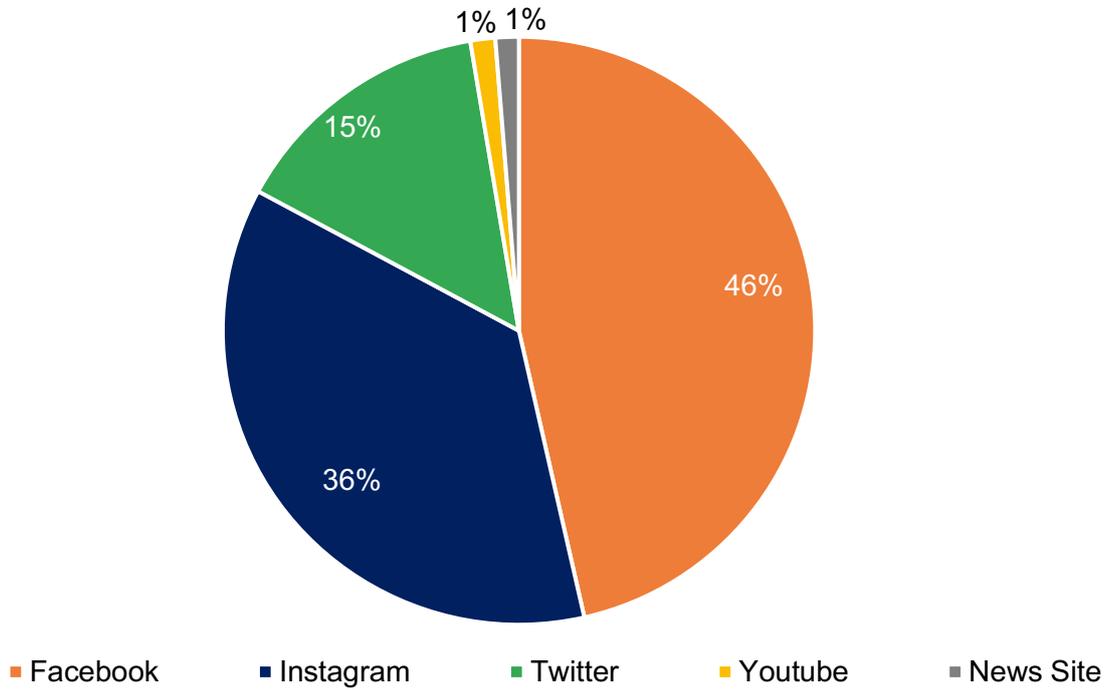
Table 2. Examples of observed public engagement activities by the tobacco industry.

Examples	
	
<p>ESPL 2021 इंडिया टुडे गेमिंग द्वारा घोषित और Infinix Note 10 सीरीज स्मार्टफोन द्वारा प्रस्तुत भारत का पहला और सबसे बड़ा पैन-इंडिया प्री फायर टूर्नामेंट है ITC Sunfeast Yippee Noodles इसके आधिकारिक स्पीकिंग पार्टनर के रूप में है। इंडिया टुडे गेमिंग ने भारतीय अभिनेता और बॉलीवुड स्टार टाइगर श्रॉफ को भी अपना आधिकारिक ब्रांड एंबेसडर साइन किया है।</p>	

Tobacco Marketing Activity by Channel

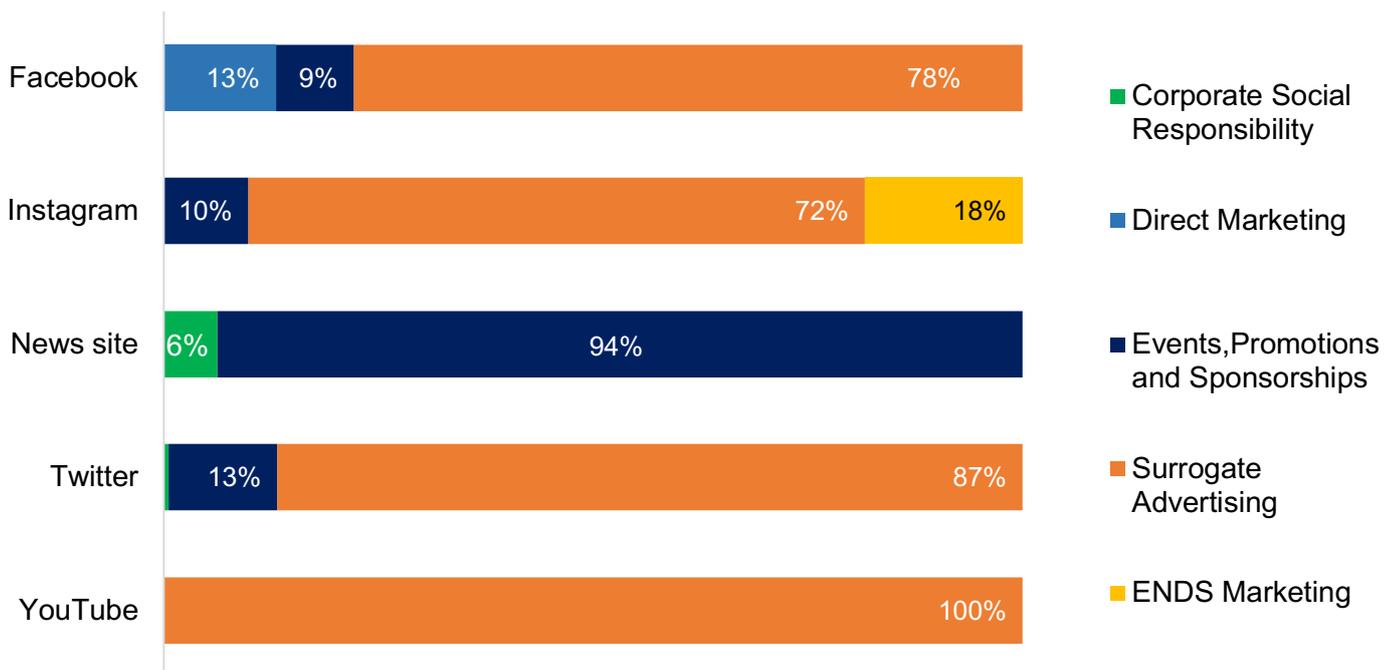
- All observed tobacco marketing (direct and indirect) during this period was conducted on social media channels, including Facebook (46%), Instagram (36%), Twitter (15%), YouTube (1%) and via news sites (1%). Surrogate marketing of tobacco products was conducted through Facebook, Instagram, Twitter and YouTube. The news media was the primary source for reports on tobacco industry-sponsored corporate social responsibility initiatives.
- Smoking tobacco products were marketed through Facebook (53%), Instagram (30%) and various news websites (13%). Smokeless tobacco products were marketed through Facebook (41%), Instagram (37%) and various news websites (21%). ENDS products were marketed via Instagram (100%).

Figure 5a. Type of Marketing by Platform



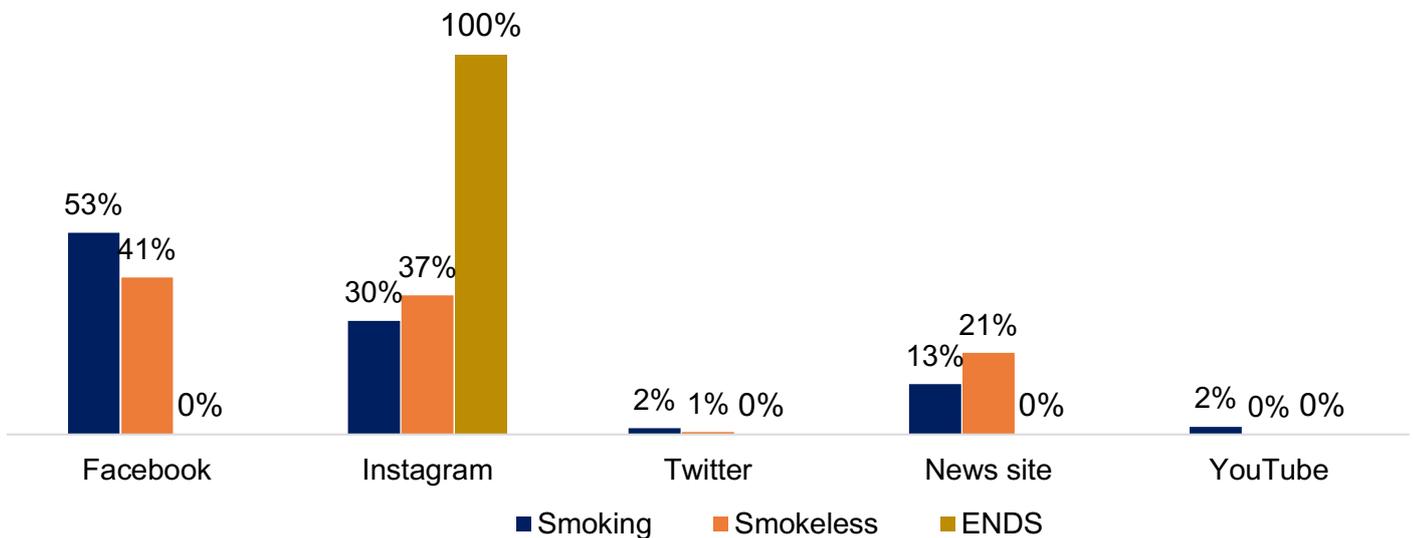
Aug. 16 to Sept. 15, 2021 (n = 1,255)

Figure 5b. Type of Marketing by Platform



Aug. 16 to Sept. 15, 2021 (n = 1,255)

Figure 5c. Type of Product Marketed by Platform



Smoking(n = 835)
Smokeless(n=336)
ENDS (n = 84)

Frequently Used Messages

A word cloud is a visual representation of the most frequently used terms across online platforms. The larger the word in the visual, the more commonly it was used in tobacco marketing messages. This month, the most frequently used terms were related to lifestyle e.g, “freshness” and “refreshment.” Others were related to religion e.g., “lord Vishnu,” and “puja.” While other common terms were related to events, promotions and sponsorship e.g., “best entry” and “exciting prize.” See below for the most popular words this month:

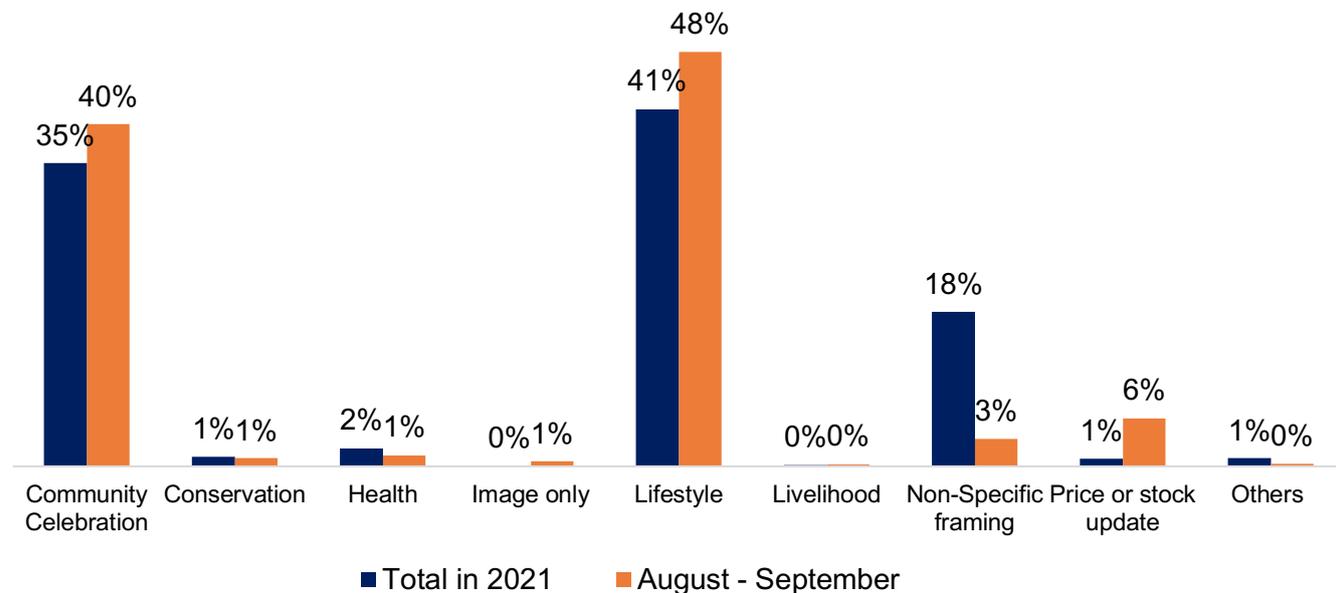


Aug. 16 to Sept. 15, 2021 (n = 1,255)

Framing of Marketing Messages⁶

- Many tobacco marketing messages were framed with a celebratory tone linked to lifestyle (48%)⁷ and community celebration (40%).
- Both smoking tobacco products and smokeless tobacco products were marketed using messages related to lifestyle and community celebration, while ENDS products mostly delivered price or stock updates. For smoking products, 52% of messages focused on lifestyle and 40% on community celebration. For smokeless tobacco products, 46% of messages focused on lifestyle and 48% on community celebration. For ENDS products, 83% of messages were about price or stock updates and 17% of messages focused on lifestyle.

Figure 6a. Total Marketing by Message Framing (All Products)

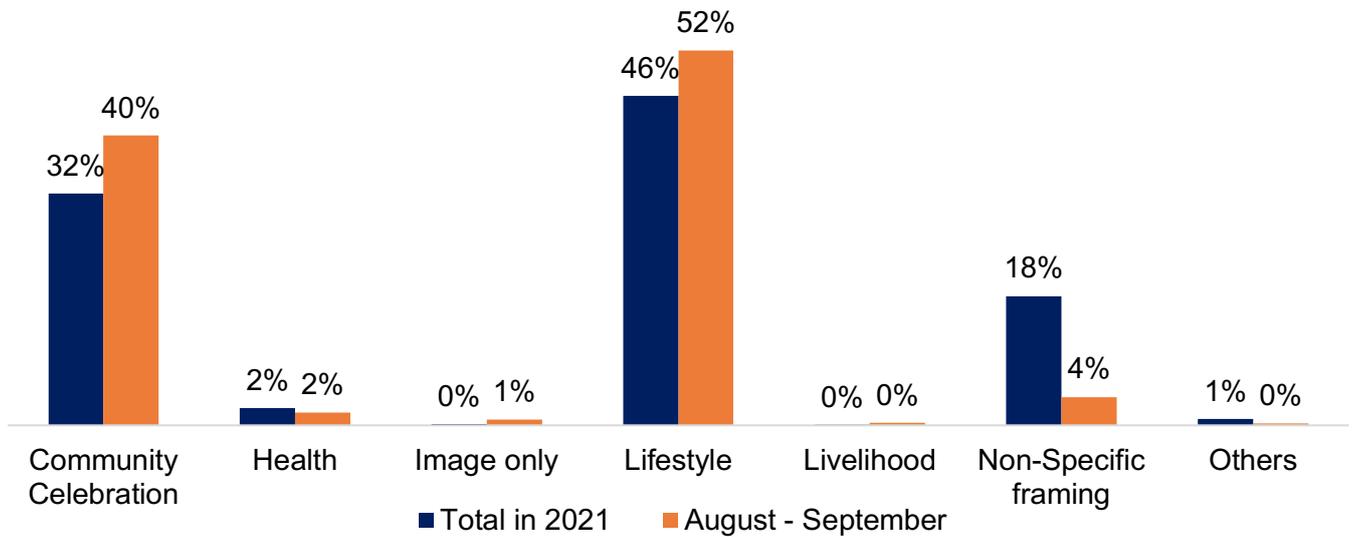


Total in 2021 (Dec. 16, 2020 to Sept. 15, 2021) (n = 7,876)
Aug. 16 to Sept. 15, 2021 (n = 1,255)

⁶ See Appendix A for more details on how we determined message framing.

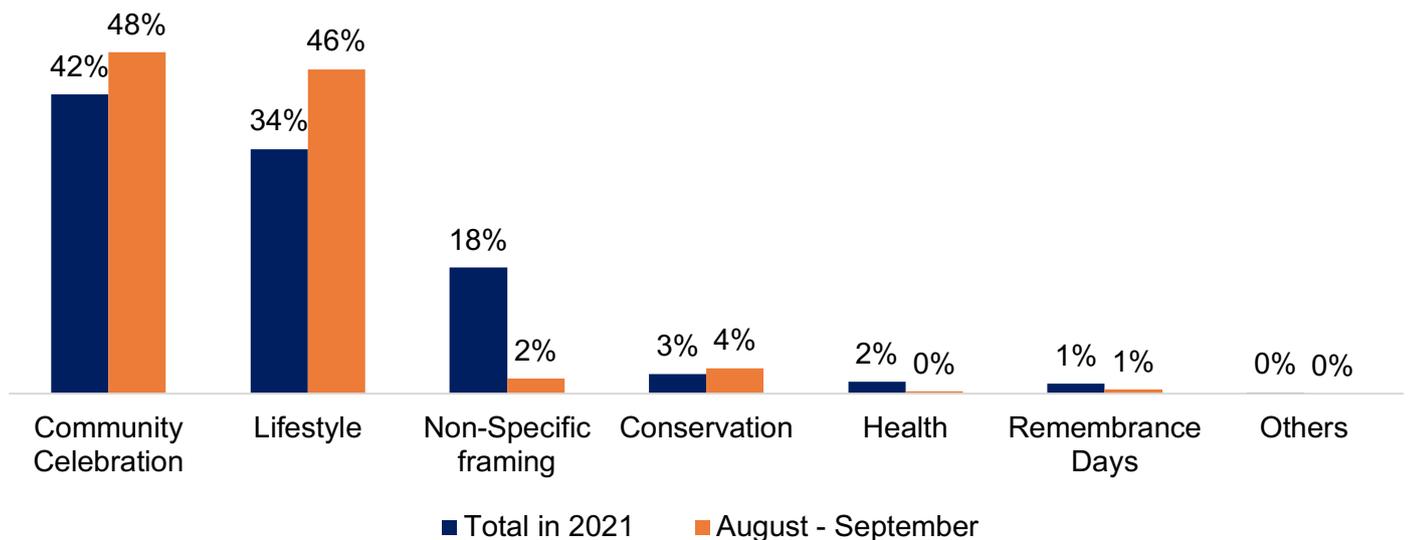
⁷ The significant increase in messaging that focuses on lifestyle from July onwards is likely attributable to our introducing ENDS marketing into the scope of the marketing that we monitor and report on.

Figure 6b. Marketing by Message Framing (Smoking)



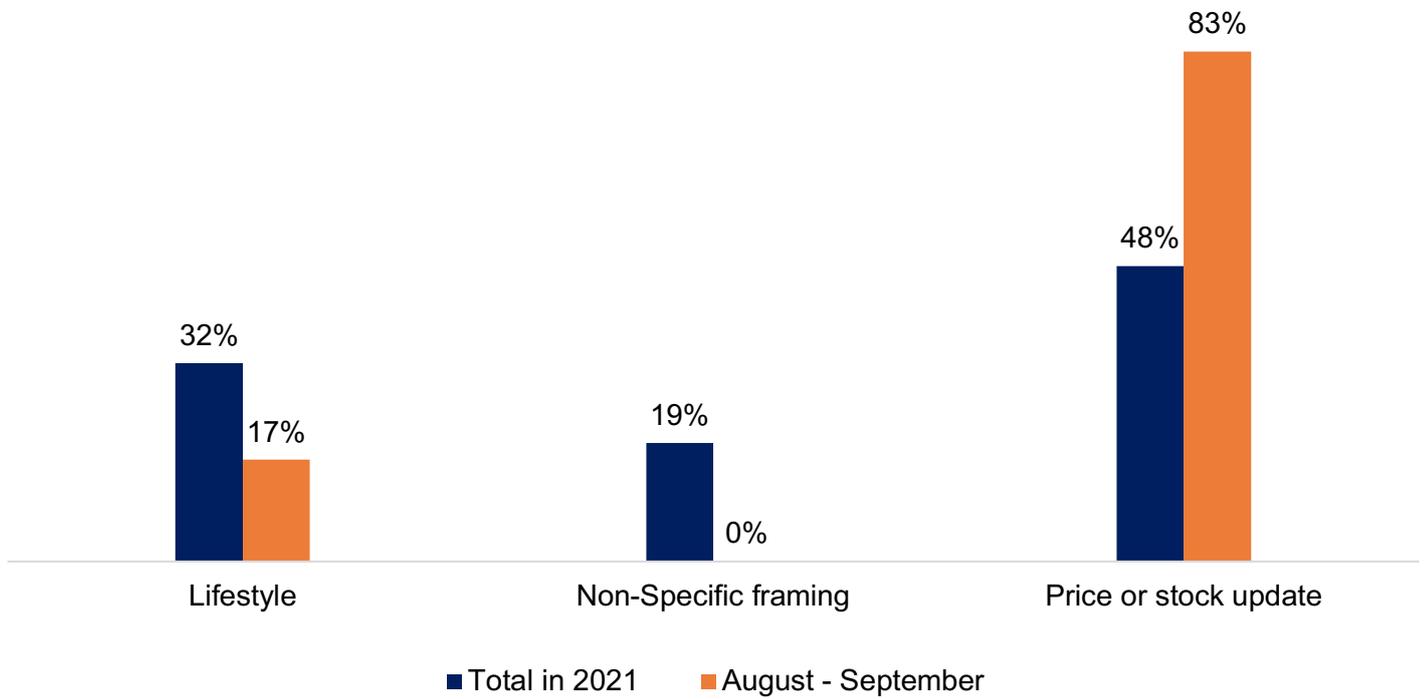
Total in 2021(Dec. 16, 2020 to Sept. 15, 2021) (n =4,873)
Aug. 16 to Sept. 15, 2021 (n = 835)

Figure 6c. Marketing by Message Framing (Smokeless)



Total in 2021(Dec. 16, 2020 to Sept. 15, 2021) (n = 2,848)
Aug. 16 to Sept. 15, 2021 (n = 336)

Figure 6d. Marketing by Message Framing(ENDS)



Total in 2021(Dec. 16, 2020 to Sept. 15, 2021) (n =145)
Aug. 16 to Sept. 15, 2021 (n = 84)

*Coding was revised to better identify the message framing used for ENDS marketing. Most of the messages that were previously being coded as non-specific framing, are now coded as "price or stock update."

*Non-specific framing refers to marketing that does not fall under a specific category.

Methods: This report summarizes information gathered through specific keyword searches from all publicly available online news sites, including the online websites of leading media houses such as Times of India and Hindustan Times, among others. Information was also gathered from social and digital platforms, including but not limited to Facebook, Instagram, Twitter, YouTube and forums. The information was then machine coded and systematically human-checked to determine direct and indirect marketing by source. The analysis is currently restricted to content in English and Hindi. Full detailed methodology, including coding, is available upon request.

For more information:

TERM website: <https://www.term.community>

TERM Facebook page: <https://www.facebook.com/termindia/>

Vital Strategies website: <https://www.vitalstrategies.org/>

Vital Strategies Media Beacon: <https://www.mediabeacon.org/#language>

Vital Strategies social media: <https://www.facebook.com/vitalstrategies/>; <https://twitter.com/VitalStrat>

APPENDIX A

Message Framing for Marketing Recorded August 16 to Sept. 15, 2021

Most of the tobacco marketing observed this month used messages related to lifestyle, followed by community celebration.

Table 1: Type of Message Framing

Message Framing	Summary
<p>Lifestyle</p>	<p>There were 604 instances of advertising recorded during this period that used lifestyle-related message framing. Posts that used keywords depicting tobacco products as aspirational, fun or luxurious, were coded as lifestyle.</p>
<p>Community Celebration</p>	<p>There were 499 instances of advertising observed during this period that focused on community celebrations. Messaging that mentioned and/or was timed with national and international observances was tagged as community celebration. This month there were mentions of national religious festivals such as Janmashtami and Ganesh Chaturthi, as well as national and international sporting events.</p>

Health There were **16 instances of advertising** that used health-related messages. Posts that used keywords highlighting corporate social responsibility initiatives related to public health, or topics related to COVID-19, were coded under health. Some posts from tobacco companies that advertised surrogate products and mentioned their healthiness, were also coded in this category.



Conservation There were **12 instances of advertising** related to conservation. Messaging that highlighted efforts related to environment conservation were coded as conservation. Some posts from tobacco companies that advertised surrogate products as eco-friendly were also coded in this category.

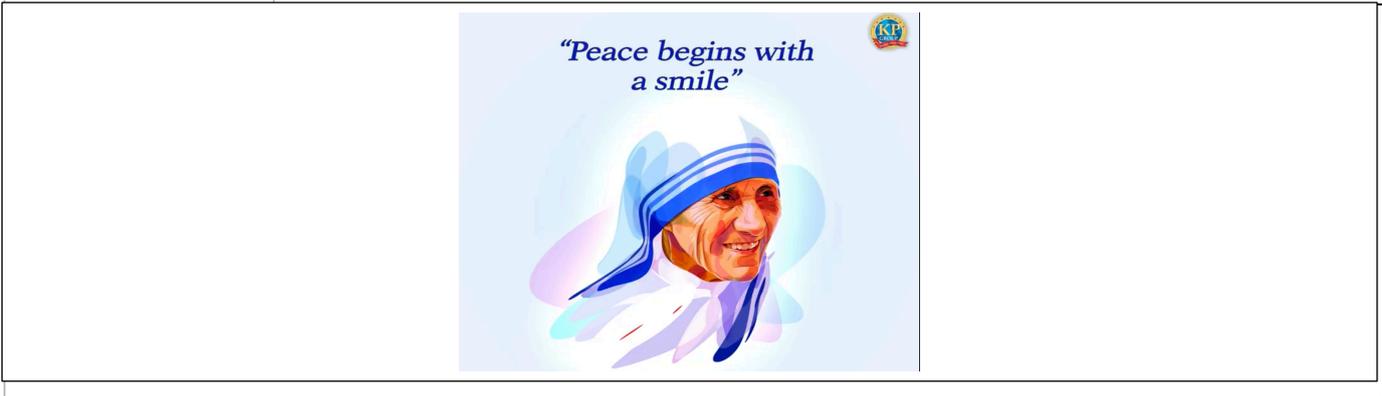


ITC pioneering planet-friendly initiatives in specialised packaging
By Rahul Kumar 13 Aug 2021

Moving to the next horizon, ITC is pioneering a planet-friendly initiative through innovative fibre-based solutions, including moulded fibre technologies for specialised packaging, leveraging its existing proprietary R&D platforms and global collaborations. The business has launched a sustainable packaging portfolio comprising recyclable paperboards, under the 'Filo' and 'Omega' series to substitute single use plastics. This segment offers immense opportunities with the global bio-degradable packaging market estimated to grow to nearly USD 121-billion by 2025.

ITC's paperboards, paper and packaging business is a market leader and has made significant progress with recent strategic investments in areas such as pulp import substitution, proactive capacity addition in value-added paperboards as well as in extensive use of industry 4.0 to drive a new paradigm of quality and efficiency.

Remembrance days There were **2 instances of advertising** that used messaging related to remembrance days. Posts that used remembrance or memorial days in their messages were coded in this category.



Non-specific framing There were **40 instances of advertising** that did not fall under any of the other categories. This was widely observed for Bidi marketing during this period.



Price or Stock Updates There were 70 **instances of advertising** that offered updates related to stock availability or price drops. This was widely observed in the direct marketing of ENDS products during this period.



 **ukvaporwaves_india** GEEKBAR PRO
20MG 1500 PUFFS LUSH ICE
FLAVOUR AVAILABLE
@2400
#geekbar #geekbarpro
#geekbarproindia #disposablecig
#vapeinindia #ecigindia #delhivape
#indiavape #vapeshopdelhi
#disposableindia #dyb
#vapeshopindia #vapelyf
#disposablevape #vapestore
#geekbarvape #fashionista
#smokeclouds #vapetricks
6w

Image Only There were 7 **instances of advertising** that were coded as Image Only. These posts had minimal to no text and contained images of tobacco or tobacco packs, as well as images related to storage, retail and manufacturing. Images most often had a logo of the brand or displayed tobacco packs with branding. This was commonly observed for marketing of bidis.



ⁱArora, M., Nazar, G. P., Chugh, A., Rawal, T., Shrivastava, S., Sinha, P., ... & Glantz, S. (2021). Tobacco imagery in on-demand streaming content popular among adolescents and young adults in India: implications for global tobacco control. *Tobacco control*, 30(1), 42-48.

ⁱⁱ Ulucanlar S, Fooks GJ, Gilmore AB (2016) The Policy Dystopia Model: An Interpretive Analysis of Tobacco Industry Political Activity. *PLOS Medicine* 13(9): e1002125. <https://doi.org/10.1371/journal.pmed.1002125>

ⁱⁱⁱ Hillman A.J., Keim, D., Schuler, D. (2004) Corporate political activity: A review and research agenda. *Journal of Management*, 30(6), pp.837-857. <https://doi.org/10.1016/j.jm.2004.06.003>