

Comissioned research



# Influence of media activity on perception of the e-cigarette industry in 2016 in Poland

Media report 2017

## Ladies and Gentlemen,

Because of new legal regulations, the previous year was dynamic and critical for the whole e-cigarette and e-liquid industry in European Union. In May 2016 provisions of the EU Tobacco Directive came into force. In August, an amendment was signed to the law on protection of health against consequences of using tobacco and tobacco products with its provisions coming into force in Poland in September last year.

Provisions implemented from the Tobacco Directive significantly changed operation of the whole industry. The new law imposed a series of new legal obligations on manufacturers and importers, among others the possibility of manufacturing liquids with maximum nicotine content of 20 mg/ml, spare containers with volume up to 10 ml, paid EU notification of products together with required laboratory tests and presentation of obligatory financial statements. Regulation significant from the point of view of a consumer and relating to sales of products, including trans-border sales, their availability and pack look also changed.

The multitude of changes on the e-cigarette and e-liquid market translated into intense media interest in the e-cigarette industry. What exerted a positive influence on the perception of this market sector in Poland? What is the media image of e-cigarette and e-liquid industry in Poland? In order to research these issues, we ordered a media report that was conducted by a specialized media monitoring agency in January 2017.



Justyna Lipowicz  
President LIPRO e-Liquid Production

**05.2016**

The new Tobacco Directive enters into force

**07.2016**

President signs the Polish Tobacco Law

**09.2016**

Provisions of the afore-mentioned law enter into force

**Spring 2017**

First financial reports of e-cigarette and e-liquid manufacturers

New law introduced a series of regulations on safety of manufactured and imported products

Manufacturers and importers make first product notifications and file first financial reports concerning their companies

For the first time everybody has access to data on activities of e-cigarette manufacturers. Data becomes public.



The research conducted pertained to media presence of the e-cigarette industry in Poland in 2016. Material from monitoring of more than 1100 press titles, 5 million Internet resources and 100 radio and TV stations has been subjected to analysis. The publications recorded have been divided with respect to:

- overtones - into positive, negative and neutral materials,
- size - into articles, press note, mention,
- media type - into the Internet, press, radio, TV,
- media profile - into specialized, regional, general, economic media,
- main topics brought about in media.

The material gathered has been analysed with the use of techniques for measuring efficiency of public relations activities. For this purpose specific media indicators have been used: size, recipients' reach, visual overtones index, SWOT analysis and equivalent advertising value.

### Glossary of terms

**Publication reach** - number of potential contacts between recipients and the media message. Press - total paper stock, Internet - total number of unique users of a given portal, Radio - station total listening figures, TV - station total viewing figures.

**AVE (advertising value equivalent)** – valuation of a given message expressed in a currency (in Polish zloty). It expresses total financial resources that would need to be spent if a given material be an advertisement.

**Publication overtone** – potential influence of the publication on shaping image of the researched entity in the media estimated on the basis of favourability index. We distinguish the following overtones: positive, negative and neutral.

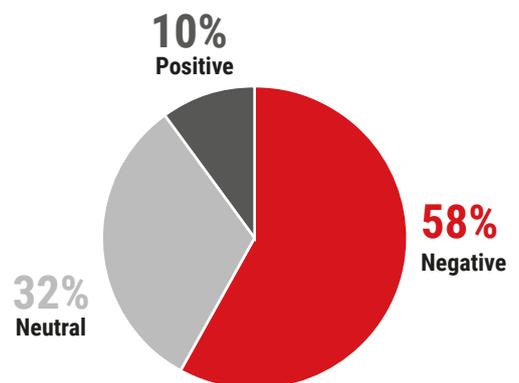
# Media image of the Polish e-cigarette and e-liquid industry in 2016



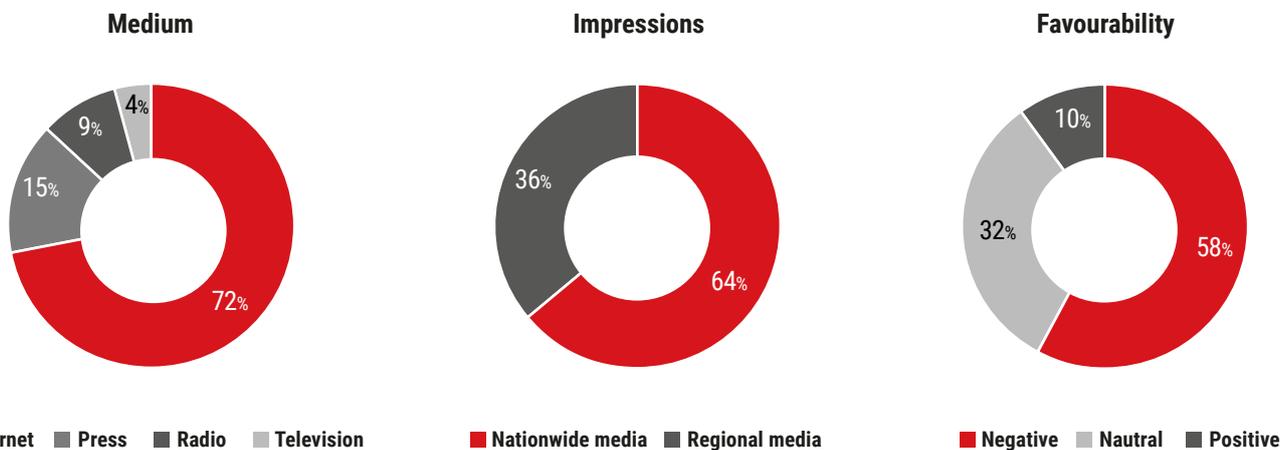
## 01. The most important media monitoring results



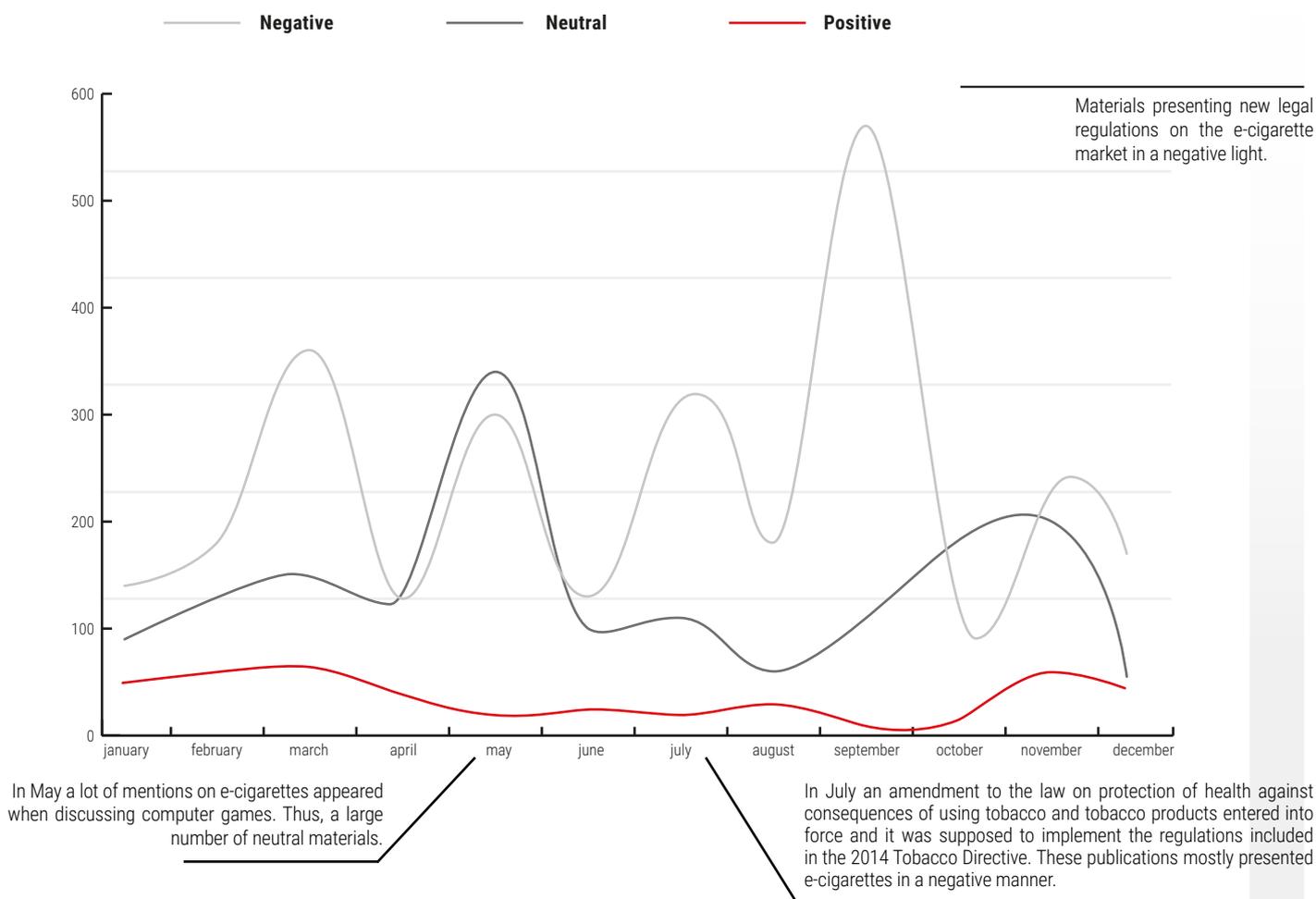
### Favourability



In 2016 a total of 4,976 publications have been recorded in media that informed about e-cigarettes and e-liquids for filling them. In the majority of cases these publications exerted a negative influence on the perception of this industry as 58% presented the information in negative light. Information with positive overtones only contributed to 10% of the whole transmission. 32% of publications with neutral overtones have also been found in the analysed period.



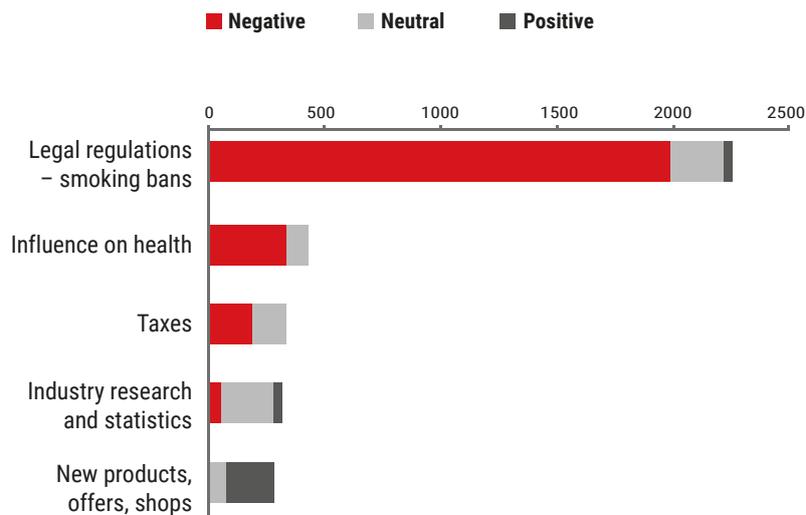
The industry was primarily present on the Internet (72%), mostly in general Polish media (64%). Potential contact with materials relating to e-cigarettes and e-liquids for filling them was at the level of 3.163 billion.



The largest accumulation of publications (743 publications) was recorded in September 2016 i.e. at the moment when provisions of the amended law on protection of health against consequences of using tobacco and tobacco products entered into force in Poland.

## 02. Most popular publication themes

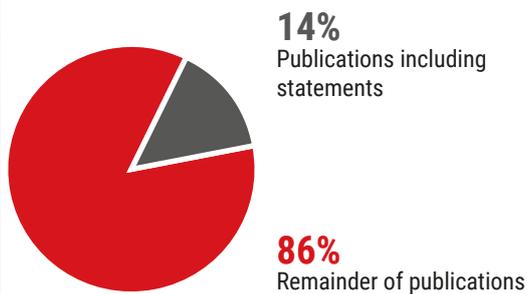
TOP 5 most popular topics for publications with overtone distribution.



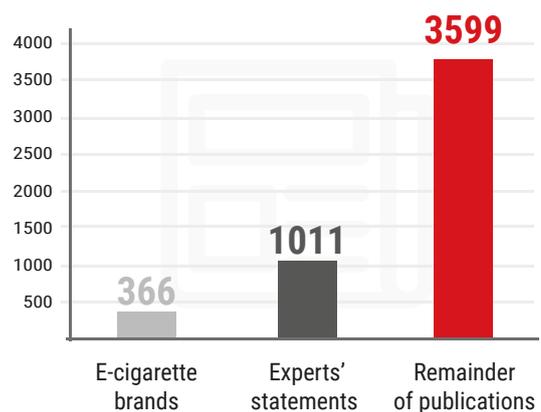
New legal regulations were the most popular topic discussed in media in the whole period under analysis. 89.4% of them presented negative overtones. From among 2261 publications on this topic, only in the case of 23 presence of representatives of companies manufacturing or importing e-cigarettes and e-liquids has been recorded.

## 03. E-cigarette industry experts in the media

Share of publications including experts' statements



Number of media communications about e-cigarette brands and statements in publications



Taking into account all the monitored materials, only 14% of them included expert opinions, among other specialists in medicine, economy, government representatives and representatives of the e-cigarette industry.

## Major conclusions



### STRENGTHS OF AND OPPORTUNITIES OF THE BRAND

- Opinions of e-cigarette users about these products are positive
- Newer technologies implemented in the e-cigarette industry are positively received by the market
- High reach of publications with positive overtones

### WEAKNESSES OF AND THREATS TO THE BRAND

- Scientists and market regulator representatives make negative statements regarding the industry
- Negative publications are more often repeated by media compared to the other ones
- Media coverage lacks emphasising technological development of products and the continued reduction of harmful effects

- Press publications recorded in 2016 mostly created a negative image of the e-cigarettes and e-liquid industry. This in turn may negatively influence its perception, both by customers and business partners.
- Issues connected with media image of the e-cigarette branch should be crucial for its representatives and requires their engagement.
- Manufacturers and importers of e-cigarettes and spare containers engage relatively little in active participation in mass media.
- Current media image of e-cigarettes requires integration of the environment connected with e-cigarettes and e-liquids in order to improve industry perception.
- Scientific and business environment should increase their share in creation of expert opinions in the media, presenting reliable and matter-of-fact comments in press, on the TV and radio more often.



E-LIQUID PRODUCTION