

Global Marketing of IQOS

The Philip Morris Campaign to Popularize “*Heat Not Burn*” Tobacco

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AK Axelrod, JK Jung, NG Louis-Ferdinand, JE Reidel, and AWY Yu were SRITA Summer interns (June-August 2019) who were diligent and remarkably resourceful in investigating the myriad ways PMI promoted IQOS globally, particularly via social media and influencers.



SRITA Online Collection of IQOS Advertising:

Stanford Research Into the Impact of Tobacco Advertising (SRITA) (tobacco.stanford.edu) maintains an online repository of IQOS promotional images (3500+) and IQOS videos (120+). This material, collected by SRITA researchers, helped to inform the analysis included in this white paper. In addition, other images of other heat-not-burn device (e.g. Glo, Ploom, Pax) advertising (1000+).

URLs for SRITA IQOS Image Collection Available Online:

IQOS Ads	tobacco.stanford.edu/heat/iqos/ads
IQOS Retail	tobacco.stanford.edu/heat/iqos/iqosretail
IQOS Influencers	tobacco.stanford.edu/heat/iqos/influencers
PMI Smoke-Free World	tobacco.stanford.edu/heat/iqos/smokefreeworld
IQOS Flavors	tobacco.stanford.edu/heat/iqos/iqosflavors
IQOS Events	tobacco.stanford.edu/heat/iqos/iqosevents
IQOS Coaches	tobacco.stanford.edu/heat/iqos/iqoscoaches
IQOS Instagram	tobacco.stanford.edu/heat/iqos/iqostinstagram
IQOS Website	tobacco.stanford.edu/heat/iqos/iqoswebsite
IQOS Friendly Places	tobacco.stanford.edu/heat/iqos/iqosfriendlyplaces
IQOS Club	tobacco.stanford.edu/heat/iqos/iqosclub
Community Instagram	tobacco.stanford.edu/heat/iqos/communityinstagram
Brand Extensions	tobacco.stanford.edu/heat/iqos/brandextensions
DISQOVR	tobacco.stanford.edu/heat/iqos/disqovr
Sponsorships	tobacco.stanford.edu/heat/iqos/sponsorships
IQOS USA	tobacco.stanford.edu/heat/iqos/iqosusa
IQOS Image Collection	tobacco.stanford.edu/heatnotburn/iqos
IQOS Video Collection	tobacco.stanford.edu/videos/iqos
Comparison of IQOS and Traditional Tobacco	tobacco.stanford.edu/iqostobaccocomparison
Other Heat Not Burn Device Image Collection	tobacco.stanford.edu/heatnotburn

EXECUTIVE SUMMARY: PERSPECTIVE AS IQOS ENTERS THE US MARKET

The Changing Tobacco Marketplace

The global tobacco industry is undergoing rapid change. The historically dominant product, combustible cigarettes, is being joined by two rapidly growing alternative nicotine delivery technologies: electronic cigarettes and heated tobacco products (HTPs). The principal difference is that e-cigarettes aerosolize nicotine containing liquid, whereas HTPs utilize a chemically treated rod of shredded tobacco made to smolder by a heating element. These emerging categories are growing rapidly as the sales of traditional cigarettes decline. Three major tobacco companies (Philip Morris International, Altria, and JUUL) are collaborating via reciprocal agreements to dominate both the traditional and emerging tobacco products markets. Together they control the world's leading brands in each of these categories: cigarettes (Marlboro), e-cigarettes (JUUL), and heated tobacco (IQOS).

Reasons for Studying IQOS Marketing

While the marketing of Marlboro and JUUL has been thoroughly studied, IQOS promotion has yet to be subject to comprehensive academic analysis. Philip Morris International's (PMI) effort to gain market share for IQOS, which was introduced in 2014 and is currently on the market in 52 countries, has been aggressive, multilayered, and has spanned an impressive spectrum of media and methods. The IQOS brand has broad global reach spanning Europe, the Middle East, Asia, and both North and South America. After IQOS entered US test markets in the fall of 2019, it plans nationwide rollout during 2020. Although IQOS is categorized as an electronic cigarette in many countries, it was allowed on the market by the US Food and Drug Administration (FDA) only as a traditional cigarette product in the US. PMI's application to have IQOS marketed as a reduced risk product in the US has not yet been authorized by the FDA. This categorization constrains the brands' marketing activities.

Over a 10 month period, we conducted an intensive evaluation of the various forms of IQOS marketing. The methods, targets, and goals of IQOS marketing campaigns are set by corporate leadership and are executed with the assistance of an impressive array of advertising agencies, social media promoters, event coordinators, media content producers, brand managers, modelling agencies, and talent recruitment companies. The campaigns make liberal use of artists, musicians, social media influencers, and celebrities in promotional roles.

Our goal in providing a thorough examination of IQOS global marketing practices was to help inform American regulators and legislators to monitor closely the brand's promotional activities. In addition, revealing the scope, scale, and targeting of IQOS marketing may help nations around the world to consider whether additional constraints are warranted.

Promoting IQOS as a Smoking Cessation Device:

Throughout its global marketing, PMI states the goal of IQOS is to help adult smokers transition to a less harmful product. "IQOS" is an acronym widely understood to mean "*I Quit Ordinary Smoking*." Although PMI denies the brand name IQOS has any specific meaning, overwhelming evidence suggests otherwise. IQOS emphasizes its signature tobacco leaf shaped letter Q in its brand extensions and numerous other promotions (eg. Qreator, Qollection, Qoins, DisQovr, Q-labs). (see illustration page 12) IQOS campaigns rely heavily upon proxy terms for smoking cessation ("*This changes everything*," "*alternative*," and "*switch*") which do literally say "*use this product to quit smoking*" but have little if any ambiguity to consumers. The implied presence of the word "*quit*" within the brand name itself reinforces the message to cigarette smokers that IQOS is a safer and healthier alternative.

Contrary to PMI's marketing claims, studies of IQOS use among smokers show that it is most often complimentary to smoking and infrequently leads to abandoning combustible cigarettes. Indeed, dual use of cigarettes and IQOS, such as in "*IQOS Friendly Places*" where smoking is prohibited, may actually serve to deepen nicotine addiction and make cessation less probable.

Promoting IQOS as Healthy:

As cigarette smoking kills nearly half a million Americans per year, claiming to be healthier than smoking is indeed a low bar. IQOS promotions imply that the product is both healthier and even healthy - downplaying the obvious health risks associated with its use. Advertisements promote IQOS as "*smoke-free*," and only "*steam*" (#iqosteam has 31,050 posts). IQOS aerosol is a mixture of glycerin, nicotine, flavorant chemicals, and other compounds. As the aerosol from IQOS is derived from smoldering tobacco leaves at 350 degrees centigrade, it emanates combustion products which means that IQOS does technically emanate smoke. As steam is merely water vapor, IQOS is certainly not steam as their advertisements have stated, and when they suggest otherwise, they are striving to deceive their customers. IQOS also is described in advertisements as "*cleaner*" – another health proxy claim.

Because of the negative press about the health threat posed by traditional cigarettes and vaping, IQOS seeks to position itself as neither: a "*smoke-free*" nor a "*vapor-free*" product. There is nothing "*free*" about the aerosol emanating from IQOS. In reality, IQOS is a hybrid product with attributes of both combustible cigarettes and e-cigarettes. PMI's choice of the term "*heat not burn*" for its IQOS device is part of its marketing strategy to reinforce its "*smoke-free*" descriptor. A more accurate term for the category would be "*heated tobacco*" product. The brand slogan "*IQOS is always a good idea*" is manifestly false as the use of IQOS by non-smokers, especially nicotine naïve adolescents, would be a notably bad idea. Evidence to date suggests that youth adoption of IQOS has been less than with vaping products.

Marketing IQOS as an Elegantly Fashionable Lifestyle Product

IQOS claims that its marketing exclusively targets adult smokers. The majority of smokers are between the ages of 30 and 60 with lesser prevalence among other age groups. To preferentially reach an audience of middle-aged smokers, a targeted message would be delivered by a middle-age smoker describing how IQOS helped them with their cigarette smoking addiction. IQOS advertising practices differ markedly from this formula. IQOS advertisements are dominated by chic, attractive young models, especially females, in fashionable dress and elegant poses. These models are often pictured holding an IQOS as though it were a precious object. IQOS advertising positions the brand as stylish, trendy, high tech, and a favorite of beautiful people. Another prominent IQOS advertising theme is that of social acceptability with advertisements claiming it has less odor, no ash, and lacks concern about secondhand exposure.

Traditional cigarette advertisements often convey the message that if one uses their brand they will be more successful in their love life. IQOS advertisements explicitly say that it will "*Change your kisses*" and their "*Hello beauty*" campaign unsubtly promises that it will enhance a user's looks. Advertisements also imply that if you love your mother, father, or spouse you should encourage them to use IQOS. IQOS product design, packaging, and retail locations position it as a high-end luxury brand. The product's design and its stores closely emulate those of Apple, while it makes use of Tiffany's distinctive blue color in its employees' dress, in brand extensions such as IQOS high heels, event invitations, and even in its logo and hummingbird icon.

IQOS markets itself as being pleasurable. Advertisements often show the device adjacent to food, desserts, coffee, or alcoholic beverages. IQOS tobacco containing HEETS come in multiple flavors typically

named for colors with descriptors of menthol, citrus, nuts, dried fruit, vanilla, cocoa, and herbs. The use of colors rather than flavors in the product names emulates sister brand Marlboro and is perhaps intended to circumvent limits placed on flavored tobacco in some jurisdictions. IQOS suggests pairing its flavors with macaron cookies, chocolates, and coffee flavors endorsed as being complementary to IQOS flavors by famous chefs.

The Extensive Ecosystem of IQOS Places and Events

IQOS is heavily marketed in hundreds of branded locations, including stores, boutiques, cafes, lounges, and co-working spaces all of which employ attractive young salespeople to explain the intricacies of the device and to offer free samples of IQOS HEETS flavors. These are sophisticated store designs, placed in premium, high traffic shopping locations in major cities. Sales ambassadors make claims of IQOS healthfulness and theatrically perform “*laboratory tests*” from which potential customers are supposed to conclude that IQOS aerosol is free of harmful chemicals while cigarettes leave a nasty brown stain. Direct retail is supplemented by pop up stores in shopping centers and salesperson attended displays in tobacco shops, and kiosks at major entertainment events. IQOS Cafes feature branded mugs, napkins, and coasters and suggest pairings between IQOS and coffee flavors.

“*IQOS Friendly Places*” in which IQOS may be used, but not cigarettes, are located in numerous countries in bars, cafes, restaurants, clubs, and even beaches. Underlying the IQOS Friendly Places program is the concept PMI promotes that IQOS is “unsmoke” and “smoke-free” and thus does not lead to harmful secondhand exposure from the exhaled plume. IQOS use is associated with a substantial exhaled volume of aerosol containing nicotine, glycerin, and combustion products from smoldering tobacco leaf. The goal of the Friendly Places program is to undermine regulations which forbid indoor smoking. This allows smokers of regular cigarettes an alternative way of smoking when in bars, restaurants, etc. Such dual use, common among IQOS users, closes nicotine exposure gaps during the day and actually deepens addiction.

This study identified 270 IQOS sponsored events of varying types including music concerts, art exhibitions, fashion shows, food and wine festivals, film festivals, sporting events, and even Germany’s Playboy Playmate of the Year Awards in 2019. Many of these events are attended by underage children and a few, such as Tel Aviv’s TLV Student Day, are clearly youth-oriented. IQOS joins its sister brand Marlboro through sponsorship of motorsports.

IQOS Advertising Via Social Media

Most smokers are mature adults, the group PMI describes as its sole marketing target. As smoking is most prevalent among the 30-60-year-old demographic, one would anticipate that their advertising campaigns should be designed to possess special appeal to this audience and use media channels most heavily frequented by them. The marketing channels favored by this age group are printed magazines and newspapers (or their digital equivalents), television, and radio. Instead, IQOS marketing is most heavily present in social media channels such as Instagram, which have strong youth bias. PMI initiated Instagram accounts and hashtags, such as #iqos which has 440,000 posts (as of 1-24-2020). Aside from company postings, IQOS social media is heavily supplemented by numerous community fan sites such as #iqosfriends, #iqosstories, and #iqoslovers which may, or may not, be supported by paid brand representatives. It is important to realize that passive viewership of Instagram hashtags is many multiples of the number of posts. Engagement via likes, comments, and sharing of posts amplifies viewership across multiple social media platforms such as Facebook and Twitter. IQOS hashtags promote the product across many millions of viewers including a sizable underage population at little or no cost to the company.

An internal PMI document reveals that PMI did not use social media to market its products prior to the launch of its IQOS product. In the US, Congress banned tobacco advertising from broadcast mass media (TV, radio) in 1970. Social media is a contemporary form of mass media that, unlike earlier forms, is minimally regulated, incurs a minimal cost, and knows few national boundaries. It is interesting to note that some IQOS promotional social media posts emanate from countries in which IQOS is not officially on the market, such as Egypt and Iran, but are shared internationally via hashtags.

IQOS partners with the cross platform instant messaging app LINE, which is number one in Japan, where it places targeted advertisements on smart phones. As a Bluetooth connected device, IQOS forwards to PMI reams of data about the users smoking habits. Such data is highly valuable for targeting marketing campaigns.

Influencers and Celebrities

PMI uses an army of influencers, brand ambassadors, celebrities, and coaches. Some are employees, while others are members of the community who are offered discounts, gifts of IQOS products, and invitations to special events where they promote IQOS to their network of friends. IQOS's *"Refer a friend"* program encourages users to act as members of their sales team by offering gifts or cash rewards from recruiting friends. Advertisements suggesting making a gift of IQOS on Mother's Day, Father's Day, and Valentine's Day ask the user to recruit family members.

IQOS also sponsors contests with prizes and offers discounts and incentives. PMI created an IQOS Club to build a community among its customers, with loyalty awards scaled according to silver, gold, and platinum levels analogous to airline or credit card rewards programs. IQOS also has created clothing and accessory lines as brand extensions including, high heeled shoes, backpacks, and caps. These often include a stylized letter "Q" in their design under the Qreator space program.

IQOS Public Relations

In September 2017, PMI launched what it dubbed a *"Foundation for a Smoke-Free World."* The company pledged to spend \$1 billion over 12 years, \$80 million per year, purportedly to support tobacco harm reduction by accelerating research into alternatives to cigarettes. It seems clear that PMI's *"unsmoke campaign"* is not focused upon smoking cessation, but rather legitimizing and promoting an alternative nicotine delivery system, especially its IQOS brand. As PMI remains active in undermining policies intended to reduce cigarette use, many public health advocates believe that the company created the *"Foundation"* as a public relations measure to burnish its image while promoting IQOS. It should be emphasized that if PMI were serious about achieving a *"smoke-free world,"* it would halt its aggressive worldwide marketing of Marlboro, and its other major tobacco brands, and also curtail its generously funded political lobbying efforts to suppress governmental actions to protect public health.

As part of its public relations efforts, PMI buys so-called *"vanity awards"* with supposed *"honors"* purchased from companies whose business model is fee-based awards designed to burnish the reputation of their business clients. PMI has had a particular focus on environmental *"awards"* (e.g. 50 Climate Leaders, One Planet Award). It is ironic that PMI commissions environmental merit awards when its cigarette, cigar, and heated tobacco products deliver concentrated smoke-polluted air directly into the lungs of millions of their customers.

PMI engages in partnership with magazines (e.g. Vogue, VIVA, PINK, Marie Claire), to create content in support of their marketing messages for IQOS. Its \$6.5 million agreement with Vice Media, which describes itself as the *"Fast growing, #1 youth media company in the world,"* involves its magazine,

blogs, and film documentaries. A periodical named IQOS Magazine is filled with glowing stories about the product.

Comparing IQOS and Traditional Tobacco Advertising

The overall impression is, with the sole exception of the change/switch theme, IQOS advertisements faithfully recapitulate the techniques used by the tobacco industry during the 20th century. While youth-appealing material and health claims appear most bold in countries with lax tobacco control regulations and enforcement such as Japan, Romania, Armenia, Ukraine, and Russia, they are nevertheless present in all countries where IQOS is marketed. While the advertising content resembles time honored messages of tobacco advertising, the distribution channels IQOS uses are unmistakably modern innovations (e.g. social media, smartphone apps).

Comparing IQOS With JUUL

PMI's business strategy for IQOS has dual purposes: retaining its current customer base and recruiting new ones. As it is not in their business interest to transition Marlboro smokers to IQOS, PMI's strategy may well be to lure customers from competitive cigarette brands to become PMI customers via IQOS. There is also data suggesting that IQOS recruits lapsed smokers to resume. As IQOS enters the US market the question arises as to whether or not it might follow a trajectory similar to JUUL in terms of youth adoption.

The heavy use of social media platforms favored by youth to promote IQOS suggests that the brand is attempting to attract young customers. Indeed, IQOS advertising has numerous similarities to that which JUUL used to become a youth fad, both in terms of its messaging and channel use. There are important differences between these two nicotine delivery devices in their current forms. JUUL is simple to use, IQOS is quite complicated. JUUL is small and stealthy, resembling a USB drive, while IQOS is bulkier and unmistakably a smoking device. Adolescents are highly price sensitive. The IQOS device sells for approximately \$100 - 150 while JUUL, which used to sell for \$50, is now offered on the JUUL website at \$15 (1/24/2020). A pack of HEETS containing 20 sticks sells for \$4.50 - 9.90 per pack, depending upon the flavor, while JUUL, which is marketed as delivering an equivalent dose of nicotine to a pack of cigarettes, sells for \$4 per pod. Other small vaping devices sell nicotine pods for considerably less. Finally, while IQOS comes in a variety of flavors, unlike JUUL all include a base of tobacco flavor which has limited appeal to non-smoking youth. While IQOS is likely to evolve in future generations, in its present form is unlikely to achieve the viral youth uptake witnessed for JUUL.

PMI's Adherence to its Corporate Marketing Standards

"Our marketing practices worldwide follow four core principles:"

1. *We market and sell our products to adult smokers*
2. *We warn consumers about the health effects of our products*
3. *Our marketing is honest and accurate*
4. *We respect the law*

Our research illustrates that PMI's marketing of IQOS has strayed from its corporate standards substantially. Its use of youth-oriented social media channels, trendy pop music festivals, and celebrity influencers are misaligned with their commitment to exclusive *"adult smoker"* targeting. PMI's claims of cigarette cessation efficacy and the healthfulness of IQOS fail the *"honest and accurate"* standard.

PMI's efforts to circumvent indoor smoke free ordinances via its innumerable IQOS Friendly Spaces (e.g. in restaurants, bars) is incompatible with PMI *"respect for law"* doctrine.

As the world's largest tobacco company (by dollar value) the company certainly has the resources to compel adherence to its marketing principles across their entire international marketplace. As a global company professing company-wide standards for its marketing should consistently sustain its policies regardless of the permissiveness of the country in which its products are being marketed. Their senior leadership of PMI in New York City and Neuchâtel, Switzerland are fully accountable for the marketing practices of its 77,000 employees wherever their products are sold. When investigative journalist Chris Kirkham of Reuters in May 2019 revealed widespread use of underage social media influencers to promote IQOS, PMI responded that: *"No laws were broken . . . we set high standards for ourselves and these facts do not excuse our failure to meet those standards in this instance."* While they suspended their most visible influencer programs, youth appealing marketing continues worldwide. As typical of tobacco industry, PMI only apologized and changed practice when caught and compelled by public criticism and unwanted regulatory attention to correct their marketing excesses.

Regulatory Implications of IQOS Global Marketing

As Altria, through its reciprocal agreements with PMI, commences selling IQOS in America, we plan to closely observe their marketing practices. As IQOS was only authorized by the FDA as a cigarette equivalent, the brand is captive to all limitations placed on the marketing of traditional cigarettes such as no advertising on radio or television and no flavors other than tobacco or menthol. The lack of FDA authorization for IQOS modified risk claims means that they must tread lightly in promoting the use of IQOS in smoking cessation. Recently, the FDA took action against JUUL for unauthorized marketing of modified risk by using proxy terms such as *"alternative"* and *"switch"* as well as endorsements by smokers claiming to have transitioned to JUUL from cigarettes. In response to an explicit FDA warning in late September 2019, JUUL was compelled to end its *"switch"* campaign.

With the letter *"Q"* for Quit in IQOS's name and its prominence throughout its marketing domains, together with its globally pervasive health and cessation claims, the FDA would be well justified keeping IQOS off of the US market unless and until scientific evidence accumulates qualifying it for the modified risk designation. The examples of IQOS advertisements submitted to the FDA during its approval were notably restrained and most certainly did not convey the true nature of its promotional activities for the brand globally. Indeed, given the excesses of IQOS marketing around the world, the FDA would have ample public health grounds to either withdraw the IQOS marketing approval or insist upon stringent post-marketing monitoring with a low threshold to take it off the market if its promotional activities fall out of bounds.

Prospects for IQOS Commercial Success

The business goal of PMI in creating IQOS was to compensate for the declining revenue of its globally dominant Marlboro cigarette brand via rising sales of its IQOS HEETs. In response to the progressive decrease in cigarette sales, PMI has invested *"over \$6.0 billion in research, product, and commercial development"* of its portfolio of heated tobacco product line over the decade 2008 – 2018. (ref. PMI Investor Information). Effectively, PMI has clearly made a big bet that its future vigor depends upon the success of its HT products.

During the 3rd quarter of 2019, PMI's global cigarette unit shipment volume declined 5.9% (183,519M in 2019 versus 195,068M in 2018) while heated tobacco sales grew 84.8% (15,985M in 2019 versus 8,652M in 2018). (ref Bloomberg 3rd Q 2019). While IQOS is showing an impressive growth rate

it still represents a small fraction of PMI's worldwide cigarette sales. PMI reports estimated number of users of IQOS has grown from 2.9M (Q1 2017) to 12.3M (Q3 2019). However, unlike Marlboro smokers, a sizable fraction of IQOS users do so only part time and continue to use their customary cigarettes in parallel.

Being first to popularize HT over the mass market may confer PMI an advantage. Positive indicators for IQOS market position include its rapid growth in selected markets (e.g. Japan, Russia) and its early FDA approval in the US at a time when many vaping products have yet to even submit applications. Growth in PMI's customer base may occur if IQOS captures cigarette smokers of competitors' brands. PMI's *"Smoke Free World Campaign"* public relations effort may sway the public and regulators to enable the IQOS brand to enjoy wider latitude in marketing and tax advantages compared with combustible products.

However, it is far from certain that over the long-term HT products will prove successful, or that PMI will lead the pack even if it does. The profit margin for current generation HT products is almost certainly lower than for traditional cigarettes. With a slim margin, downward pressure on price is a threat to PMI's profitability. The sales price of the IQOS device is quite high: IQOS 2.4 (UK 59£, Germany 60€, Canada \$102, Japan ¥4,980); IQOS 3 (UK 89£, Germany 89€, Canada \$147, Japan ¥9,980). (PMI Investor Information. October 2019). The current price of IQOS HEETS is approximately the same as a pack of Marlboros. As numerous competitive HT products emerge on the market, PMI is likely to have difficulty in sustaining these price levels. In addition, IQOS is taxed favorably in many countries compared to cigarettes, a circumstance which is unlikely to sustain as the market share for HT and vaping products increases and governmental revenues decline.

The growth of IQOS has been driven by intensive marketing which, no doubt, has incurred large expenses. Their sales workforce includes an army of coaches, brand ambassadors, and influencers. They have hosted many hundreds of luxurious IQOS promotional parties at which PMI hired popular entertainers. Physical locations such as IQOS stores, boutiques, lounges, cafes, shopping center popups, and co-working spaces do not come cheap. Many are located in premier shopping locations with high rents. The sophisticated interior design of these facilities must be costly. Paying innumerable restaurants and bars incentives to carry *"IQOS Friendly"* signs adds up. IQOS also maintain clubs and offers discounts and promotions both to reward brand loyalty and to recruit new users. All of this means that the high customer acquisition costs of IQOS may not be sustainable.

Cannibalization of existing customers from among PMI's current cigarette smokers is likely adverse to the bottom line. The co-branding of its flagship cigarettes brand Marlboro and IQOS Marlboro HEETS may tend to foster this conversion. Worse still, some smokers may use IQOS as a bridge to tobacco cessation. The categorical exclusion of emerging tobacco products from the world's largest markets, China and India, is another challenge to sustained growth.

Competition is a major threat to IQOS. In the HT category, PMI faces steadily increasing competition from other major tobacco company HT brands such as Glo (BAT), Pulze (Imperial), and Ploom (JTI). Technically innovative startups are also infringing on this space. Some brands make IQOS compatible sticks, which undersell HEETS. This is important as the profits in HT lie in the consumables rather than the device.

Ultimately, the largest competitive threat to IQOS may prove to be vapor-based nicotine delivery systems which are cleaner, less complicated to use, and require less maintenance. Refillable vaping systems offer much lower cost for the equivalent nicotine delivery of a pack of Marlboros (or IQOS HEETS). The limited attractiveness of IQOS to youth may have long term pipeline implications. Vapor products are likely to remain favored by youth due to their simplicity of use, sweet and fruity flavors, lack of

tobacco flavor, reduced harshness, and lower cost. If PMI's campaign to undermine smoke free laws become effective, resulting in emerging tobacco product use in bars, restaurants, and even workplaces, vaping products will also benefit. Faced with stiff competition from the vaping segment, HT well may not succeed in becoming a dominant part of the tobacco marketplace.

Limitations of this Study

While this white paper provides a comprehensive picture of IQOS Global marketing through February 2020, it is certainly not exhaustive. As we do not have access to PMI's marketing plans for IQOS, our study of its promotional activities is essentially a reverse engineering of the company intentions through study of their consumer facing promotional activity. Fortunately, with the vast quantity of material amassed over our 10 month study, we feel that we have sufficient insight to make many important inferences and to reach informative conclusions.

We acknowledge that many additional events, social media channels, influencer/brand ambassador programs, point of sale promotions, etc. may well exist for IQOS that our research did not uncover. Indeed, over the course of this study we continually discovered new IQOS promotions and, despite the impressive scope of what we uncovered, we suspect that much more IQOS promotion may be lurking in the corners of the internet and offline.

A particular area of limited visibility is what IQOS salespeople (coaches and brand ambassadors) say to potential customers. While PMI specifies guidelines for their employees, we strongly suspect that one-to-one and small group marketing conversations routinely transgress boundaries regarding the healthfulness of IQOS and its efficacy in achieving smoking cessation. Even adhering to the PMI party line on these important issues strays far from what is supportable by the scientific evidence.



<https://www.instagram.com/p/Bz-RRzIYkp/>

PMI claims that the brand name IQOS has no meaning, but it is widely understood to mean “I Quit Ordinary Smoking.” IQOS marketing universally emphasizes its signature tobacco leaf shaped letter “Q” (e.g. Qreator, Qollection, Qoins, DisQovr, Q-lab) and its promotions feature tobacco cessation messaging, health reassurance, and testimonials from former smokers. PMI trademarked its distinctive leaf shaped “Q.” (<https://trademarks.justia.com/862/70/q-86270726.html>)



The tobacco leaf shaped letter “Q” is prominently featured in IQOS stores. The pervasive emphasis on the letter Q makes it obvious that IQOS is being promoted as a means of “quitting” tobacco products.



<https://www.behance.net/gallery/33712684/IQOS-Flagship-Store-Chiado-Lisboa-Philip-Morris>

IQOS Logo with a notable highlight emphasis upon the letter Q.



<https://www.behance.net/gallery/33712684/IQOS-Flagship-Store-Chiado-Lisboa-Philip-Morris>

Synopsis of IQOS Global Marketing

IQOS has been promoted globally via comprehensive and layered series of campaigns designed to envelope potential customers via multiple media channels, influencers and celebrities, sophisticated retail environments, and numerous hosted events and sponsorships.

Product Name:

IQOS: “i” as in iPhone/iMac/iPad to connote intelligent.

Widely believed the initials stand for “*I Quit Ordinary Smoking*” –company denies.

“Q” is shaped like a tobacco leaf

The letter Q (quit) permeates IQOS marketing: Qollection, Qreators, Qoins, DISQOVR, Q-Labs

Packaging:

Charger shaped as a rounded rectangle like an iPhone.

Retail:

Stores designed to convey high tech and luxury. Closely imitate Apple stores.

Some packaging mimics Tiffany.

Slogans:

Quit without using the word: “*This changes everything*” “*Alternative*” “*Switch*.”

Video testimonials: Smokers praise IQOS for helping them “*Switch*”

Heath Messages: “*95% less don’ts*,” “*Clean*,” “*Steam*.”

“*Smoke free – vapor free*.” But IQOS produces both smoke and vapor.

Social Appeal: “*This changes your kisses*” “*Hello beauty*”

Flavors:

Flavors: Mint, nutty, citrus, vanilla, cocoa, herbal, etc.

Names by colors, not flavors (Sienna, Amber, Yellow, Blue, Turquoise, Purple, Green Zing)

Described as: “*Zesty & fresh*” “*Refreshing & cooling*” “*Rich & warm*” “*Blueberries & forest fruit*”

Food pairing, famous chefs – suggest complimentary coffee and chocolate flavors.

Free Samples:

Given in stores, parties, and events. Sales staff teach how to use device, try out flavors.

Events:

Hundreds of branded promotional activities: splashy parties, music events, dances, etc.

Sponsorships:

Film festivals, food & wine festivals, fashion shows, motorsports, etc. (children sometimes present)

IQOS Friendly Places:

Branded cafes & lounges – escape smoke free laws – reinforces “*not smoke*” messaging.

Social Media:

Instagram, Facebook, Twitter, etc. Youth oriented online communities.

Much like traditional tobacco ads: Lifestyle - make IQOS part of everyday life

Food, coffee & tea, alcohol, social situations, feminine -masculine, romance, sports, technology, pleasure, relaxation, holidays, nature, etc.

IQOS Hashtags:

#iqos, #iqosfriends, #iqosstories, and #iqoslovers – have millions of interactions

Influencers:

Social media stars with large following paid to praise IQOS.

Brand ambassadors:

Paid employees or volunteers who promote IQOS and offer discounts, freebies, and invitations.

IQOS Coaches:

Marketing employees who sometimes hangout in public areas and at events – have sales quotas.

Celebrities:

Actors, musicians, artists, fashion models, chefs, professional drivers, paid to praise IQOS.

TV Program:

Company sponsored popular Japanese comedians who discussed their IQOS use.

Youthful Models:

Especially used in permissive countries such as Romania, Ukraine, Russia, Japan.

Marketed IQOS at Tel Aviv University's Student Day a campus Event in May 2019

Refer a Friend:

Get a reward for recruiting a friend – family members especially encouraged.

Effectively recruits users to join IQOS marketing team.

IQOS Clubs:

Affiliation clubs reward brand loyalty.

Earn "Qoins" for exclusive events, special perks and IQOS accessories or devices. (note "Q")

Discounts:

e.g. \$75 off coupons for device. Profits in consumables.

Rewards Programs:

Silver, gold, & platinum levels like airline programs based upon purchases

Brand Extensions:

Designers high heels, back packs, purses, etc. Called Qollection by Qreators (note "Q")

Life Insurance (Reviti):

Life insurance company created by Philip Morris International to market IQOS

Offers 25% discount for IQOS users: *"bringing life back to insurance."*

Magazine Partnerships:

Favorable media commissioned through Cosmopolitan, Vogue, Vice, Pink, Focus, Daily Mirror, etc.

Vanity Awards:

PMI purchases "awards" from companies, especially those *"honoring"* businesses for their environmental practices.

PMI Foundation for a Smoke-Free World:

"We're giving up cigarettes". "A tobacco company that actually cares about health"

An IQOS promotional campaign disguised as a noble public health gesture by the Marlboro maker

SECTION I. IQOS “HEAT NOT BURN” NICOTINE DELIVERY SYSTEMS

Introduction

The tobacco industry faces a dilemma in the US marketplace. According to the Centers for Disease Control and Prevention, cigarette smoking among adults has declined from 20.9% in 2005 to 14.0% as of 2017, a 67% decrease from 1965. (Ref CDC adult smokers) In 2017, this represented a population of some 34.3 million adult smokers, which although still a sizable market, represents an inexorably declining population of consumers year over year. As sales volume has dropped, financial performance has primarily been maintained through price rises, a compensatory tool that cannot be sustained indefinitely. (Ref CDC tobacco economic trends) As their markets become ever more anemic, major tobacco companies are seeking ways to reinvigorate their flagging sales. The flourishing American e-cigarette market, largely initiated by small independent companies, lately has increasingly become dominated by major tobacco companies: RJ Reynold (Vuse), British American Tobacco (Vype), Imperial Tobacco (Blu), and Altria (JUUL).

In their quest for growth via new products, traditional cigarettes and e-cigarettes are being joined in the marketplace by a new category called heated tobacco products (HTP). This technology involves heating specially treated shredded leaf tobacco which is made to smolder but not to combust. A burning cigarette reaches a temperature of @900 degrees Celsius at its tip, whereas HTPs heat only to about 250-350 Celsius. In many cases, the shredded tobacco is immersed in generous doses of an aerosolizing vehicle, such as glycerin, often comprising 50% of the consumable product by weight. This contrasts with e-cigarettes that are almost entirely a liquid mix of propylene glycol and glycerin doped with nicotine derived from tobacco, but no actual leaf. In a sense, HTPs are a hybrid, containing components common to both e-cigarettes and traditional cigarettes. Because of its lower temperature and lower delivery of harm causing chemicals, tobacco companies promote HTPs as having reduced risk. However, lesser toxicity is not the equivalent of reduced risk of human disease, a conclusion that can only be justified via long term clinical studies.

Forerunners of today's HTPs were marketed briefly in the 1980s and 1990s but uniformly failed in the marketplace. (see discussion below). The most popular of today's HTPs are derivatives of these earlier attempts. The San Francisco startup PAX Labs launched two HTPs: Ploom (2010) and PAX (2012) several years prior to launching their immensely successful e-cigarette JUUL in 2015. Ploom is now predominantly marketed in Japan, and PAX is principally used with marijuana (“dry herb vaporizer”).

Philip Morris International (PMI) introduced IQOS (I Quit Ordinary Smoking) in Italy and Japan in 2014. As of late 2019, IQOS is marketed in 52 countries around the world. In May 2017, the FDA received PMI's application to introduce IQOS to the US market as a modified risk tobacco product (MRTP). In January 2018, the Federal Drug Administration (FDA) denied PMI's application citing insufficient evidence of reduced risk. The FDA authorized an amended application on April 30, 2019, for marketing IQOS as a cigarette product, but did not endorse the Philip Morris claim of reduced risk. (ref FDA April 30, 2019) The application for IQOS modified risk claim is still under consideration by the FDA. IQOS was introduced to the US market in September 2019 with the city of Atlanta as its initial test market.

In approving IQOS to be offered in the US market, the FDA indicated that it expected the marketing to adhere to that in force for cigarette products, including not advertising on radio and television. The FDA clarified that it expects clear boundaries to the brand's marketing. *“You include representations about your marketing plan for your products in the United States and indicate that you intend to focus marketing on adult cigarette smokers while limiting reach to unintended audiences. FDA*

encourages you to consider measures to limit youth-exposure to any of the products' labeling, advertising, marketing, and/or promotion appearing in print media publications. Limiting youth exposure and initiation and use of the products as you have indicated in your PMTAs (i.e., complete switching to IQOS by adult cigarette smokers) are important components of consideration for the marketing of these products to continue to be appropriate for protection of the public health." (ref FDA Marketing Order)

With IQOS entering the US marketplace in fall 2019, the purpose of this paper is to examine the global marketing of IQOS over its first 5 years to examine how well the company's promotion of this newly introduced brand aligns with the FDA's guidelines.

Reduced Risk Tobacco Products:

The concept of reduced risk tobacco products has long been controversial in public health circles. (refs Fairchild, Pederson, Gray) Many experts have resisted the introduction of reduced risks tobacco products as they sustain nicotine addiction, preferring an emphasis on cessation rather than transition to an alternative product. The fact that many of the "*reduced risk*" products introduced to the market over the last 70 years, such as filters, have proven ineffective has reinforced skepticism when a tobacco company makes a claim of modified risk. An illustrative example of reduced risk marketing was Omni cigarettes, introduced by Vector Tobacco Group in 2001. Omni marketed with the bold, and scientifically unsupported, claim of having lower carcinogens. The manufacturer added the catalyst palladium to improve the completeness of combustion, theoretically decreasing tar due to incomplete combustion. (ref. Hughes)

There is a lengthy history of tobacco companies claiming reduced risk for their cigarette brands while paradoxically maintaining that smoking is harmless. Patrick Sheehy, the former chief executive of British American Tobacco, wrote in 1986: "*In attempting to develop a 'safe' cigarette you are, by implication, in danger of being interpreted as accepting the current product is unsafe, and this is not a position that I think we should take.*" (ref Parker-Pope) Given the heavy burden of smoking, in terms of both death and disease, these claims amounted to disingenuous efforts to reassure customers to keep smoking despite the steadily increasing awareness of the adverse consequences of doing so. During the first half of the 20th century, tobacco companies made overt claims in their advertising that smoking their brand was healthful and even health giving. (see historical cigarette advertising collection at tobacco.stanford.edu)

During the latter half of the 20th century, filters were heavily promoted as a means of protecting the smoker even though they had no such effect. During this period, and into the early 21st century, proxy terms for reduced risk predominated. More popular among the innumerable slogans connoting reduced risk terms were: light, super light, ultra light, mild, fresh, gentle, pure, clean, and toasted. Brand names were also used to convey a reduced risk message such as: True, Vantage, Merit, Fact, and Advance. During the 1970s and 1980s, many brands advertised that they were lower tar and/or lower nicotine, assertions which were defeated by increased puffing on the part of the smoker. In 2009, the US Congress passed the Family Smoking Prevention and Tobacco Control Act, which banned many proxy terms for reduced risk in cigarette advertising. (ref Family Smoking Prevention and Tobacco Control Act) Contemporary terms such as natural, organic, and no additives still appear along with numerous other subtle techniques that continue to flow from creative advertising agencies. For illustrations of the history of reduced risk advertising, see section 20.

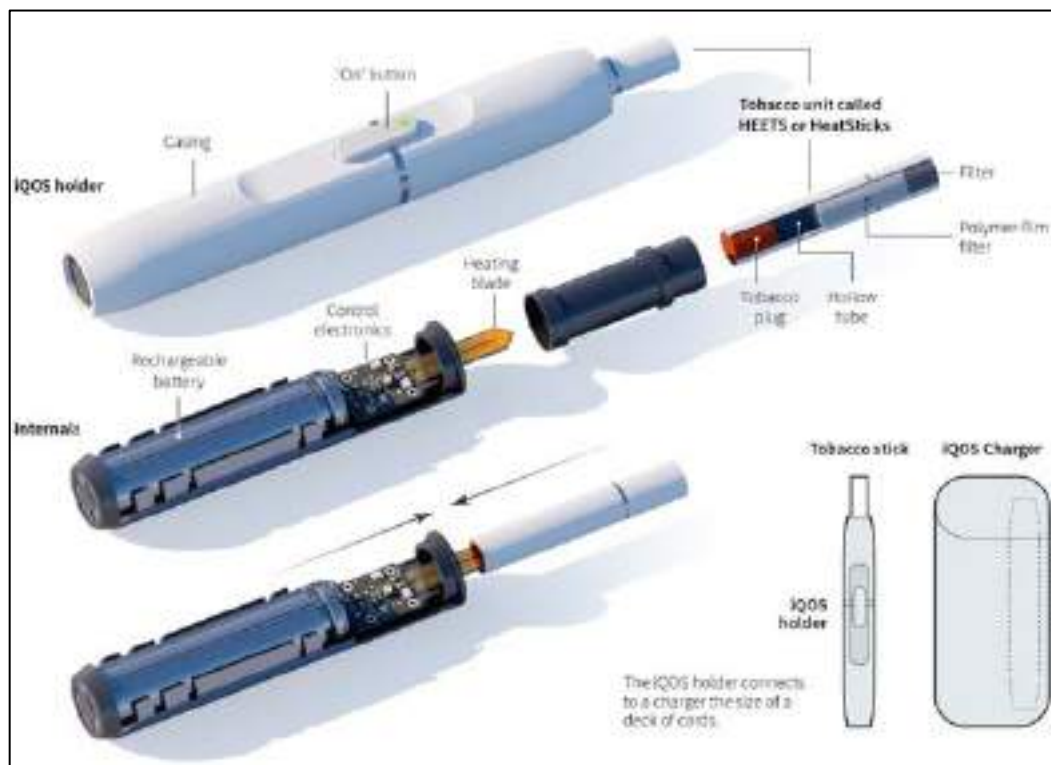
Philip Morris, the maker of IQOS, has a long history of soliciting scientists to conduct experiments in support of advertising slogans professing reduced risk for their brand versus other cigarettes. (ref

Jackler and Samji) This company, and many others, have systematically sought to escape the attempts made by regulators to impede false health claims. The example of Philip Morris's Marlboro Lights is both informative and of special relevance as it is recent. Marlboro Lights were introduced in 1972 and banned 38 years later, in 2010, as the result of the 2009 Family Smoking Prevention and Tobacco Control Act. Marlboro substituted "Gold" for "Light" and "Silver" for "Ultra-light" while sustaining similar package coloration and design. By substituting color for brand name descriptors, 92% of smokers were still able to recognize their usual brand as 'light' a year after the ban. (ref Connolly)

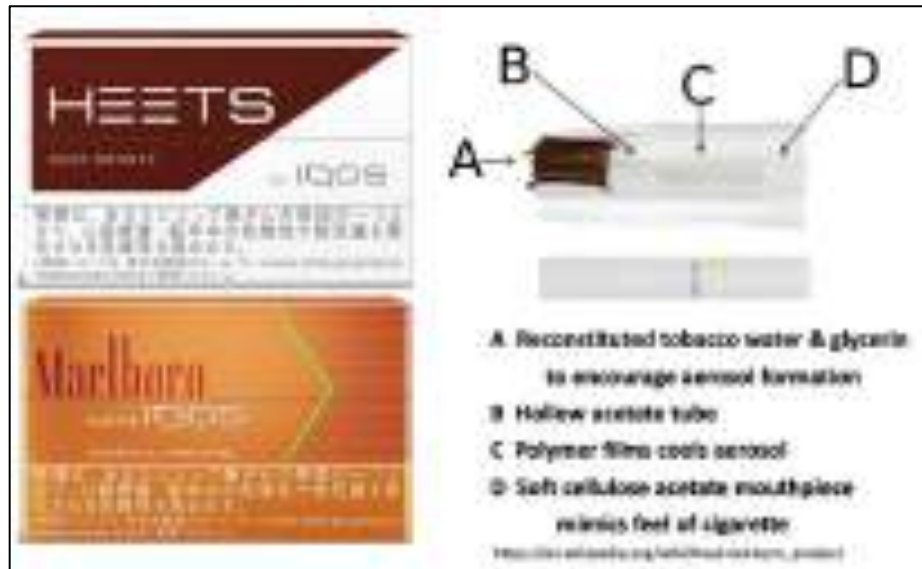
IQOS Technology:

In May 2019, Philip Morris CEO André Calantzopoulos indicated that the company had invested \$6 billion in alternative smoking technologies. (ref. Williams) IQOS heats tobacco leaves at a lower temperature than traditional cigarettes (@ 300 vs. 900 °C). (FDA PMTA Coversheet IQOS) A visible vapor is produced by the chemical doping of the tobacco leaves with chemicals such as glycerol (26% by weight compared to 1-5% in a cigarette) and propylene glycol. PMI claims that IQOS does not emit smoke. This claim is important to IQOS both to differentiate the product from cigarettes but also to bolster the company's contention that its use should be allowed even in places where "smoking" is prohibited. Chemical analysis of the cloud emitted through the use of IQOS showed that IQOS contains elements from pyrolysis and thermogenic degradation that are the same harmful constituents emitted by conventional tobacco cigarette smoke. (ref Auer) The tobacco containing element, which resembles a shortened cigarette, is marketed as either HEETS or Marlboro HeatSticks. Unlike conventional cigarettes, it is not burned and is discarded whole after use.

IQOS "heat not burn"™ technology illustrated.



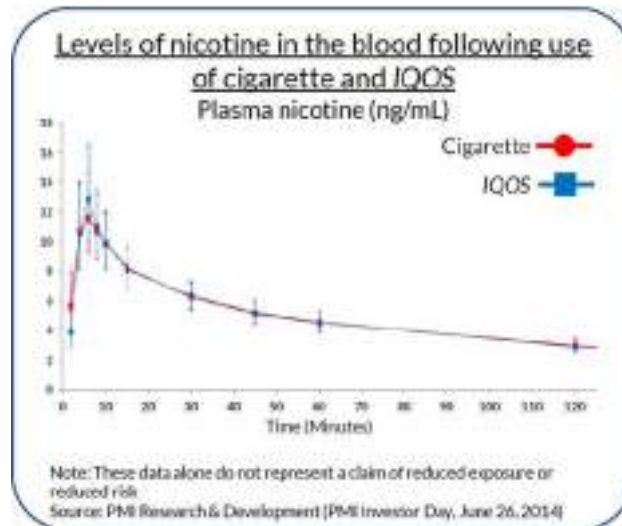
Some IQOS tobacco sticks are branded as HEETS while other carry the Marlboro name.



IQOS Nicotine:

IQOS delivers to the consumer a similar dose of nicotine to that in a conventional cigarette, although it contains less tobacco leaf (320mg vs 550-700mg). (ref Farsalinos) In contrast to conventional cigarettes, free-base nicotine is virtually absent. (ref. Meehan-Atreash) The experience with e-cigarettes is that free-base nicotine is more bitter than more acidic forms (nicotine salts) and is equally well absorbed by the lungs.

IQOS delivers to the consumer a similar dose of nicotine to that in a conventional cigarette



<https://philipmorrisinternational.gcs-web.com/static-files/1c8329b8-4a02-438e-b2df-a615e0253cfa>

Evolution of the IQOS Product Line:

Since its launch IQOS has evolved through several generations (e.g., IQOS 2.4, IQOS 2.4+, IQOS 3, IQOS 3 Duo). The product is currently available in 2 versions. The earlier versions including IQOS 2.4, IQOS 2.4+, IQOS 3 have three main components: a heated tobacco stick, an IQOS holder, and a separate charger. In late 2018, PMI launched the IQOS 3 Multi, which is a sleeker and integrated product that

allows the tobacco stick cartridge to be inserted directly into the device without the need for a separate charger thus improving the portability and stealthiness of the device. A study of consumer perceptions of evolving IQOS designs, particularly linking versus separating from traditional cigarette brand iconography revealed that the evolving design of packaging can imply modified risks to consumers. (ref Lee)

Since its launch IQOS has evolved through several generations.



<https://philipmorrisinternational.gcs-web.com/static-files/1c8329b8-4a02-438e-b2df-a615e0253cfa>

IQOS Flavors:

There are two brands of tobacco sticks that are compatible with IQOS: Marlboro HeatSticks and HEETS. Marlboro HeatSticks launched alongside the IQOS device in 2014 and are prominent in Japan, while HEETS is an updated and more recent version. HEETS flavors are named after colors (Bronze, Sienna, Amber, Yellow, Blue, Turquoise, Purple, Forest Green, and Cool Jade). Marlboro HeatSticks flavors sound more like cigarettes: Smooth Regular, Balanced Regular, Menthol, Mint, Purple Menthol, Yellow Menthol, and Tropical Menthol.

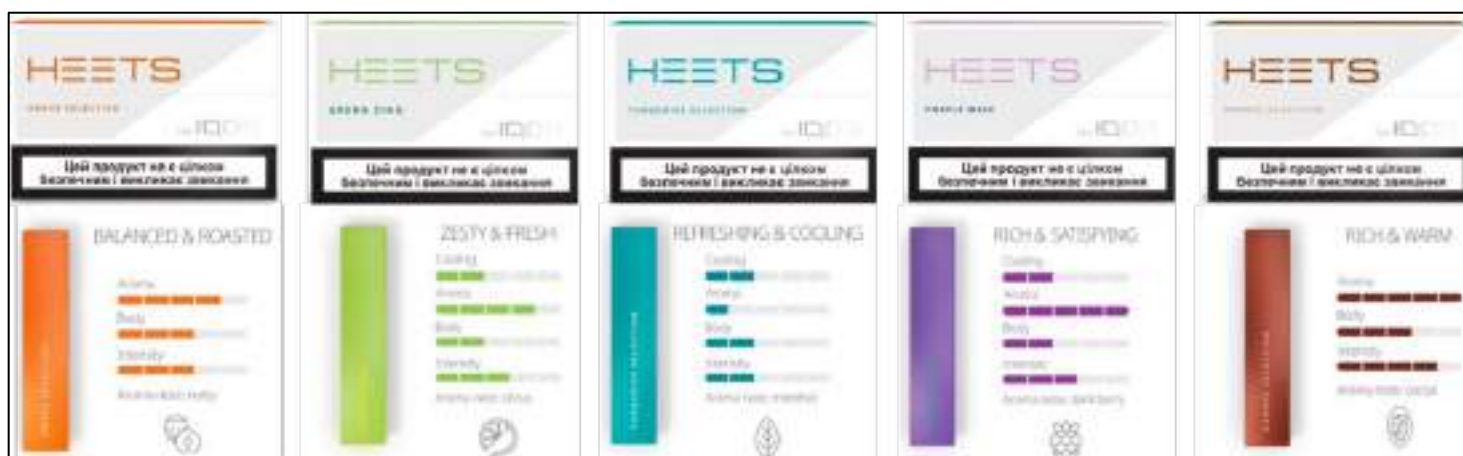
The descriptions of these flavors as well as their names are purposefully vague and avoid traditional flavor categories by using descriptors like “*wooden, balanced, and fine.*” Most of these flavors are variations of tobacco. For example, Tropical Menthol is a fruity flavored menthol variant that is currently available only in Japan. The launch of Tropical Menthol was highly advertised and branded as a collaboration with famous Japanese pastry chef Sadaharu Aoki. An article on the Japanese IQOS page explains how Chef Aoki created the new flavors modeled after macaron cookies; customers got the chance to pair the new Tropical Menthol flavor with Aoki’s macarons at a tasting event.

Although the IQOS tobacco sticks are usually not advertised as food flavored, they are often displayed alongside food similar to the macaron event. Events in Japan have encouraged customers to pair HeatSticks with chocolate and coffee, and IQOS advertising worldwide showcases IQOS alongside meals and alcohol. These campaigns normalize and connect IQOS to minor vices like drinking coffee or enjoying a sweet treat.

Flavor Descriptions from IQOS Websites.

Flavor Name	Description*
Amber	<i>Roasted tobacco blend with a balanced and rich taste with light aromatic tones of wood and nuts</i>
Yellow	<i>Smooth, refined with a subtle citrusy taste that delivers a sophisticated, beautifully balanced tobacco taste enhanced with light herbal notes</i>
Turquoise	<i>Cool menthol flavor with a lightly roasted tobacco blend enriched with slightly spicy aromatic tones</i>
Bronze	<i>Deep, rich and intense, it delivers a full and satisfying tobacco taste sensation infused with cocoa and dry fruit aroma notes</i>
Blue	<i>Has a tobacco flavor enriched with strong cooling menthol and subtle vanilla tones</i>
Sienna	<i>Intense with a woody essence that guarantees a well-rounded, balanced tobacco flavor</i>
Purple Wave	<i>A crisp cooling sensation infused with delicious aroma of dark forest fruits</i>
Green Zing	<i>Crisp, zesty and fresh tobacco experience delight with a cooling menthol taste sensation infused with citrus and spicy herbal notes</i>
Tropical Menthol	<i>Fruity taste and the best balance of menthol. An elegant and refreshing aftertaste</i>
Frost Green	<i>Deep and refreshing menthol</i>
Cool Jade	<i>Comfortable and refreshing menthol</i>
Fresh Emerald	<i>A menthol feel</i>

IQOS color coded flavor varieties.





IQOS flavor varieties, prominently co-branded with Marlboro, on the market in Japan. Color coded flavor varieties for IQOS HEETS, also labeled “from Marlboro.”



These caddies in Japanese IQOS stores allow customers to take individual HEETS of any flavor and try them while they hang out, wait to see a sales representative, or spend time in the Signature Cafe. (May 2019)
























<https://goo.gl/maps/rKy1bD3rvXSi9YBf8>

“United Colors of HEETS” an emulation of the slogan for the clothing company United Colors of Benetton – 20 different flavors from Europe and Asia.



<https://www.facebook.com/iqosHEETScollectibles/photos/a.153921745347119/622759908463298/?type=3&theater>

Many IQOS flavors varieties align with Marlboro cigarette brands.

Mint			
Menthol			
Menthol and Berries			
Menthol with Citrus			
Balanced			
Light			
Intense			

Sales of IQOS HEETS are rising rapidly. From PMI 4th Quarter 2019 Report



Several IQOS flavors have menthol flavoring. We have sampled IQOS menthol-flavored HEETS and found them to be intensely minty in character. An article in Talking Retail in January 2020 reported on the predicted effect of the May 2020 EU Tobacco Product Directive law banning sale of menthol-flavored cigarettes from which heated tobacco is exempt.(Ref. Shrimpton) The article quotes Peter Nixon, managing director at Philip Morris Limited opining that: *“The menthol ban is a huge moment. It’s a big risk for retailers and also a huge opportunity for retailers who prepare for it accordingly.”* Nixon quoted Philip Morris research indicating that 25% of menthol smokers will continue their present brand, while 75% will look for an alternative, with 51% choosing menthol-flavored IQOS. PMI has created a UK website for tobacco retailers to promote IQOS as an alternative for menthol smokers. (<https://menthol-ban-retail.co.uk/>)

PMI’s solicitation of UK retailers to push menthol flavored IQOS after the menthol ban from regular cigarettes to take effect in May 2020.

From 20th May 2020, the only menthol tobacco you can sell is HEETS®

IQOS

THE NEW ALTERNATIVE FOR MENTHOL SMOKERS.

51%

of menthol smokers said they would replace menthol cigarettes with IQOS after the ban.

THE IQOS REVOLUTION
NEITHER VAPING
NOR SMOKING

The advertisement is split into two panels. The left panel shows an IQOS device and a pack of HEETS, with the text 'From 20th May 2020, the only menthol tobacco you can sell is HEETS®' and 'IQOS THE NEW ALTERNATIVE FOR MENTHOL SMOKERS.' The right panel features a large '51%' in a circle, followed by 'of menthol smokers said they would replace menthol cigarettes with IQOS after the ban.' and 'THE IQOS REVOLUTION NEITHER VAPING NOR SMOKING' with an image of the IQOS device.

<https://menthol-ban-retail.co.uk/>

IQOS Colors

As part of its effort to appeal to fashion conscious consumers, PMI makes IQOS available in an array of colors. A proliferation of after-market protective covers and mouthpiece shells are available online.



At events and in their stores, IQOS makes extensive use of attractive models. In this case, each is matched to the color of the IQOS depicted on the poster behind them.



Market Growth of IQOS

As of the second quarter of 2019, PMI reported that IQOS was offered in 52 countries and that it has an estimated 13.6 million users. (Ref PMI 2019 Second Quarter Results). The report features HEETS share of the market in Japan, Korea, and Russia. In 2019, IQOS has achieved a 22% market share among tobacco products in Japan. (ref Williams)

Global growth in IQOS from the PMI 2019 Fourth Quarter Report.



Global reach of in IQOS from the PMI 2019 Fourth Quarter Report. Note that IQOS launched in the US in September 2019.



Aborted history of heated tobacco products in the 1980-90s

Although HTPs are just now establishing themselves as major players in the global tobacco marketplace, a few attempts to bring HTPs to the market occurred in the 1980s and 1990s. The concept of the “*electric cigarette*” was a lower risk nicotine delivery product which had no ashes and lessened environmental smoke. The first HTP on the market was introduced by RJ Reynolds in the fall of 1988. (ref Proctor) Premier (1988-1989) lasted only a short period in test markets due to poor consumer acceptance. Its carbon element was intended to be lighted only with a pure butane lighter. Ignited by other means, it had both an offensive smell and unpleasant taste (described as fungal and metallic overtones). Its \$300 million investment made it one of the most expensive consumer product launches of its time. Kluger described the failure of Premier as “*alongside the Edsel in the pantheon of American marketing catastrophes.*” (ref Kluger)

After taking Premier off the market, RJ Reynolds continued to evolve on its basic concept through 2 subsequent generations. Eclipse (1996-1997) and Revo (1998-2015) each of which had further refined designs of carbon tipped heating element. The shredded tobacco was mixed with glycerin in about a 50:50 ratio and then heated to produce a nicotine rich aerosol. (ref. Slade) British American Tobacco (BAT) acquired RJ Reynolds in 2017 and shortly thereafter applied to the FDA to offer an updated HTP under the Eclipse brand name. (Ref Carver) The FDA authorized the application in 2018. (ref Abcede)

Philip Morris used an alternative HTP approach in its Accord (1997-1998) product by using an electronic heating element. A device similar to Accord was marketed in Switzerland and Australia as Heatbar. (ref Elias) As with earlier devices, it failed in the marketplace due to poor taste, harder draw, and slower nicotine delivery than with conventional cigarettes. IQOS appears to be an evolutionary derivative of Accord with a ceramic heating element rather than metallic. (ref Elias)

RJ Reynolds Premier (1988-9): The first heated tobacco product on the market used a carbon tipped heating element.



RJ Reynolds Eclipse (1996-1997) was a derivative of Premier as was Revo (1998-2015).



Philip Morris Accord (1997-1998) is the technological predecessor of IQOS.



Expansion of the Heated Tobacco Market Place

The success of IQOS in the marketplace was one factor that stimulated the proliferation of HTP devices offered both by independent startups as well as by major tobacco companies. Every major international tobacco company is now competing in the HTP market.

A sampling of the heated tobacco products on the market in September 2019.



Heated tobacco products are now offered by many leading tobacco companies. Ploom entered the market in 2010, IQOS in 2014, Glo in 2016, TEEPS in 2018, and Pulze in 2019. (PMI- Philip Morris International, BAT- British American Tobacco, Imperial – Imperial Tobacco, JTI- Japan Tobacco International).



Toxicity of IQOS – is it “Smoke free”?

It is generally accepted that IQOS aerosol contains lower levels of harmful constituents than combustible cigarettes. (ref. St Helen) The lower level of known harmful chemicals found to be present in cigarettes does not exclude other toxicities unique to the heated tobacco process. (Ref Davis). An *in vitro* study showed comparable toxicity of IQOS and cigarettes on bronchial epithelial cells and lung fibroblasts. (Ref Davis) Toxicity analysis alone is not sufficient to establish reduced risk in humans, a conclusion that can only be established through assessment of biological interactions and clinical studies. (ref Popova) Long-term studies have yet to be conducted that compare disease rates of IQOS users to smokers.

IQOS marketing claims that the product is “smoke-free.” The aerosol in IQOS is rich in water and glycerin, formed primarily via evaporation and distillation. (ref. Gasparyan) However, volatile organic compounds, polycyclic aromatic hydrocarbons, and carbon monoxide are present in IQOS aerosol indicative of pyrolysis and thermogenic degradation. (ref Auer) Smoldering leaves at temperatures below the threshold for combustion can nevertheless emit smoke. Auer et. Al. argued that *“Dancing around the definition of smoke to avoid indoor-smoking bans is unethical.”* (ref Auer)

Because of the negative press focus upon both traditional cigarettes and increasing vaping among youth, IQOS seeks to position itself as neither smoke nor vapor by using the descriptors: “*smoke-free*” and “*vapor-free*.” In reality, IQOS is a hybrid product with attributes of both combustible cigarettes and e-cigarettes. Rather than being smoke and vapor “*free*” IQOS shares attributes with both cigarette categories. PMI’s description of IQOS as a “*heat not burn*” device is part of its marketing strategy intended to reinforce its “*smoke-free*” descriptors. A more accurate term for the category would be “*heated tobacco*” product.



Smoking cessation ability of IQOS

On April 30, 2019, André Calantzopoulos CEO, Philip Morris International, stated: *“In just two years, 7.3 million people around the world have abandoned cigarettes and switched completely to IQOS.”* (ref PMI press release April 30, 2019). This seems highly optimistic as PMI’s data indicates that there are only 11 million users of IQOS globally (see Q2 2019 PMI chart above). Many users of IQOS will continue to use it along with regular cigarettes. (ref. McKelvey) In a small study from Korea, all of the current IQOS users were concomitant cigarette users. (ref Kim) A larger Korean study with 21,000 participants showed that among heated tobacco product users 96.25% were dual users of cigarettes and only 1.6% were single users. (ref Hwang). The author concluded that contrary to tobacco

company's claims, heated tobacco was not a substitute for cigarettes but rather complementary to them. The concomitant use of cigarettes with a HTP was also true for Accord, the Philip Morris HTP predecessor of IQOS (ref Elias, Philip Morris.) Evaluation of IQOS's largest market, Japan, shows a downward trend in cigarette sales following the introduction of IQOS, although the combined market remained stable. (ref Stoklosa)

IQOS use by youth and never smokers

Studies from Korea and Italy have detected IQOS use among those who had not previously smoked. (refs Kim, Liu) One study estimated that among 739,000 Italians who had tried IQOS, 329,000 were never smokers. (ref Liu) It concluded that in Italy, among adults with an intention to try IQOS, the number of non-smokers exceeds that of current smokers. Among Italians surveyed, 7.7% of current e-cigarette, 2.9% of ex e-cigarette users, and 1.2% of never e-cigarette users have tried IQOS. In a Japanese study, heated tobacco users were current cigarette smokers (67.8%) or former smokers (25.0%) while only 1.0% were never smokers. (ref Sutanto) These data suggest that heated tobacco is a potential gateway to nicotine addiction, but the frequency is not yet clear. Heated tobacco appears to have the potential to reclaim lapsed smokers.

As e-cigarettes have spurred nicotine addiction among underage youth, it is relevant to evaluate youth interest in and use of IQOS. Concern over the youth appeal of IQOS has been raised by product design, packaging, flavors, and advertising. (refs. McKelvey, Hair) A 2017 survey, revealed 7.0% of youth awareness of IQOS (England=5.6%, Canada=6.4%, and USA=9.1%), and 38.6% expressed interest in trying the product. (ref Czoli) Clearly, additional studies are needed to evaluate whether IQOS and other HTPs parallel the robust youth uptake of e-cigarettes or do so to a lesser extent.

Consumer Acceptance of IQOS

Numerous IQOS reviews appear on online channels such as YouTube. Most from purveyors of tobacco products and habitual tobacco product reviews are positive. Many of the laudatory critiques include purchase links. Vaping companies, JUUL being a notable example, have offered affiliate programs in which authors of favorable reviews were given custom URL for purchase. This link generates a cash payment to the author, typically a percentage of the purchase price. It is not clear whether PMI engages in this practice, but it would not be surprising if it did so given the aggressive scope and scale of its IQOS promotional activities.

There are few sources of independent consumer reviews. An analysis of reviews of IQOS on various Trustpilot websites showed that a majority of viewers rated the product as *"poor"* or *"bad."* The most common complaints among reviewers included challenges consumers faced in using the product, defective heating blades, poor charging, difficulties in cleaning the device, problems registering the device, and unresponsiveness of IQOS coaches following the conclusion of the IQOS free trial period.

Consumers may find IQOS is a rather complicated system to use. It requires pre-warming before use and early generation IQOS models had sufficient charge for only a single Heatstick before it needs reenergizing (for 6 minutes) in its charger. In addition, it needs to be maintained with a special tool for cleaning away built up char. Quite a few have commented about breaks in the heating blade. According to RBC Capital Markets analyst Nik Modi (quoted in the Wall Street Journal): *"Consumer feedback on the device has been poor. It takes too long to 'learn' about what IQOS is and how it works. On top of that, the heat sticks retail for the same amount as a pack of Marlboros."* (ref Maloney)

IQOS customer reviews on Trustpilot (February 1, 2020)



<https://www.trustpilot.com/review/iqos.com>

IQOS customer reviews on German Amazon (February 1, 2020)



SECTION 2: STRATEGIC SETTING OF IQOS (PHILIP MORRIS INTERNATIONAL-ALTRIA-JUUL)

PMI-Altria relationship

Philip Morris, the maker of Marlboro cigarettes, was renamed Altria in 2003. PMI was spun off in 2008 with Altria marketing the corporation's tobacco brands in the US and PMI marketing the same brands globally. For example, the world's leading cigarette brand (Marlboro) is marketed by Altria in the US and globally by PMI. A dominant motivating factor for the spin-off of PMI was the burgeoning legal liability in the US and concern over potentially increased governmental constraints on the tobacco industry. Even though it does not sell products in the US, PMI has its headquarters in New York City. Altria and its subsidiary, Philip Morris USA, are headquartered in Richmond, Virginia. In 2018, PMI was the largest international tobacco company in the world based upon the dollar value of sales (\$29.6 billion), while Altria was #4 (\$19.6 billion). (ref Statistica) The world's largest producer of tobacco by volume is China National Tobacco Corporation, a state monopoly.

Over the years since they split, the daughter companies of the legacy Philip Morris, PMI and Altria, have negotiated reciprocal agreements to address intellectual property licensing, regulatory engagement and contract manufacturing around emerging technologies. In a 2013 agreement, Altria provided PMI with an exclusive license to commercialize Altria's e-vapor products internationally. In a reciprocal agreement, PMI provided Altria the right to market PMI's heated tobacco products (ie. IQOS) in the United States on an exclusive basis. According to Wells Fargo's Bonnie Herzog: *"Importantly, Altria plans to leverage Philip Morris' extensive international sales force, which should further accelerate global distribution of its e-cigarette technology and set the stage for Philip Morris/Altria to establish global market leadership in reduced-risk tobacco products."* (ref Herzog CS News 2014)

In 2015, PMI and Altria extended their relationship to encompass joint research, development, and technology-sharing. The expanded relationship specifies exclusive technology, cross-licenses, and collaboration in addressing regulatory matters. In September 2019, PMI and Altria were in discussions exploring the possibility of a re-merger of the companies. However, as the JUUL investment plummeted in value due to intense regulatory attention, PMI withdrew from these negotiations.

PMI-Altria reciprocal agreements from the Altria Annual report for 2018.



<http://www.altria.com/AnnualReport/2018/index.html>

Altria-JUUL Relationship

From the time of its introduction to the marketplace in June 2015, e-cigarette startup JUUL steadfastly maintained that it was not “*big tobacco*” and that its goal was to disrupt the tobacco industry by technological innovation and thereby “*improve the lives of a billion smokers.*” Many observers were surprised when, on December 20, 2018, it was announced that major tobacco company Altria was taking a 35% stake in JUUL for \$12.8 billion, establishing a valuation for JUUL at \$38 billion – most impressive for a startup only 3 ½ years from its inception. Analysts who have observed the business practices of JUUL founders James Monsees and Adam Bowen would have recalled that they sold their predecessor to JUUL (Ploom), a heated tobacco product, to Japan Tobacco in 2015. Thus, the 2018 JUUL-Altria junction should not have been entirely unanticipated.

The Altria-JUUL agreement is broad in its scope. Altria committed not to compete with JUUL for at least 6 years, meaning that it will not sell any other e-cigarette brand. (Ref JUUL-Altria 8-K, Altria 2018 Annual Report) On December 7, 2018, in anticipation of the yet to be announced agreement with JUUL, which became public on December 20, 2018, Altria discontinued the sale of its e-cigarette brands Green Smoke and Mark Ten. Although Altria maintained at the time that its relationship with JUUL was simply as an investor, the fact that it agreed to abandon its e-cigarette brands save for JUUL strongly suggested that JUUL was envisioned to become an essential component of the Altria brand family.

The agreement envisioned co-location of JUUL and Altria’s cigarette brands across Altria’s enormous network of retail shelf space (ie. adjacency of Marlboro and JUUL). Altria controls some 230,000 retail locations in the US. In addition, the agreement specifies that JUUL can be promoted both on the exterior and interior of Altria’s cigarette packs – a practice which came to pass (see illustration below). Altria’s highly skilled legal and regulatory teams were considered to be of value to JUUL as it defended numerous class action and individual lawsuits as well as the innumerable local, state, and federal governmental attempts to regulate its products.

In late September 2019, JUUL CEO Ken Burns, who had joined the company from Chobani Yogurt in December 2017, stepped down in the face of a maelstrom of adverse publicity and threatened regulatory intervention. He was replaced as JUUL CEO by K.C. Crosthwaite, Senior Vice President and Chief Strategy & Growth Officer of Altria. At Altria, Crosthwaite played a key role in both the regulatory applications and market launch of IQOS in the US. The appointment of a series of former Altria executives to influential positions at JUUL acted to strengthen Altria’s control of the company.

December 2018 description of the Altria-JUUL relationship in Altria’s 2018 Annual Report.

 <p>Altria 2018 Annual report:</p> 	<p>Altria and JUUL entered into a services agreement pursuant to which Altria has agreed to provide JUUL with certain commercial services, as requested by JUUL, for an initial term of six years. Among other things, Altria may provide services to JUUL with respect to logistics and distribution, access to retail shelf space, youth vaping prevention, cigarette pack inserts and onsets, regulatory matters and government affairs.</p> <p>Altria has also agreed to grant JUUL a non-exclusive, royalty-free perpetual, irrevocable, sublicensable license to Altria’s non-trademark licensable intellectual property rights in the e-vapor field, subject to the terms and conditions set forth in an intellectual property license agreement between the parties.</p> <p>Altria has agreed to non-competition obligations generally requiring that it participate in the e-vapor business only through JUUL, as long as Altria is supplying JUUL services, which Altria is committed to doing for at least six years.</p>
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Altria



**#1 Youth Initiation
Cigarette in US**



**#1 Youth Initiation
E-cigarette in US**



+

In 2017, Marlboro had 40% share US with sales greater than the next seven leading competitors combined. Among US high school students, Marlboro dominates with a 49% market share.

Centers for Disease Control and Prevention. Tobacco brand preferences.
https://www.cdc.gov/tobacco/data_statistics/tac_sheets/tobacco_industry/brand_preferences/index.htm

Peris SN, Armour R, Agaku IT. Cigarette Brand Preference and Pro-Tobacco Advertising Among Middle and High School Students – United States, 2012–2016. *MMWR Morbidity and Mortality Weekly Report* 2018;67:119–124.

A hand is holding a white Marlboro JUUL starter kit. The kit features the Marlboro logo and a large barcode. A coupon is attached to the top of the kit, displaying "\$10 OFF" and "JUUL STARTER KIT OR DEVICE KIT". The background is a dark, textured surface.

The dual conjunctions of PMI-Altria and Altria-JUUL have broad implications as they effectively create a confluence of PMI-Altria-JUUL globally with potentially profound impact. In partnering with JUUL, Altria discontinued its own e-cigarette brands and gave JUUL a non-compete agreement for 6

years. PMI has minimal e-cigarette offerings and these are exclusively marketed in the United Kingdom. In 2014, PMI acquired the UK brand Nicocigs. In 2018, PMI launch Mesh, again limited to the UK. This implies that JUUL will be the dominant, and perhaps exclusive, e-cigarette brand globally across both the PMI and Altria marketplaces. With their vast distribution network, potent marketing operation, and control of huge swaths of retail shelf space, these agreements promise to expedite the globalization of the American JUUL phenomenon.

In response to Altria's investment in JUUL, the 2018 PMI Annual report stated: *"In late 2018, Altria announced that it will participate in the e-vapor category only through another e-vapor company in which Altria has agreed to acquire a minority interest (i.e. JUUL). We intend to hold discussions with Altria about e-vapor products following completion of its investment."* (Ref 2018 PMI Annual report) In June 2019, PMI issued a press release in response to criticism: *"PMI does not own any stake in Juul. Altria does. PMI and Altria have been separate companies for over a decade. For these organizations to assert otherwise is either lazy or a deliberate attempt to mislead."* (ref PMI Press release June 2019) By August 2019, PMI had changed its tune with a press release stating: *"Philip Morris International Inc. Confirms Discussions with Altria Group, Inc. Regarding Potential All-Stock, Merger of Equals."* (ref PMI Press release August 2019)

With JUUL being Altria's only e-cigarette brand and PMI offering vapor products only in the UK, the path forward for JUUL globalization appears wide open. With PMI marketing IQOS globally and just entering the US market, the goal of worldwide dominance of the HTP market appears within reach. The dual goals of the globalization of JUUL and the Americanization of IQOS, coupled with the dominant position of the companies Marlboro brand gives PMI-Altria-JUUL innumerable opportunities and flexibilities in striving to stay atop a rapidly evolving tobacco industry. It seems clear that the strategic partnership between PMI, Altria, and JUUL has the goal of dominating world tobacco market tobacco by controlling category leading products in e-cigarettes (JUUL), heated tobacco (IQOS), and cigarettes (Marlboro).

PMI co-brands it IQOS "HeatSticks" extending the reach of its dominant Marlboro brand into the heat not burn category.



The combination of PMI-Altria-JUUL creates a potent combination of the three dominant products across the spectrum of heated tobacco, e-cigarettes, and traditional combustible cigarettes. With combined distribution, marketing, and retail shared shelf space, the clear goal of the combined entity will be to dominate the marketplace for both emerging and traditional tobacco products.



A bidirectional ladder could be promoted by the alliance between PMI-Altria-JUUL which could encourage graduation of youthful starters to initiate nicotine addiction via JUUL (or other flavored vaping product), progress to IQOS, and then to their traditional combustible cigarette products (eg. Marlboro). Adult smokers seeking to quit smoking could be encouraged to transition to either IQOS or JUUL. Note that neither of these encourage withdrawal from nicotine addiction as cessation would lead to loss of the customer to their brand family. Evidence is accumulating that the use of JUUL among teens leads to the use of combustible cigarettes in a fraction of users. The efficacy of IQOS in transition smokers is not yet proven through scientific study – most smokers who try IQOS continue to smoke as well. Some evidence suggests that e-cigarettes may have limited success in helping smokers transition, although this may be offset by dual use perpetuating nicotine addiction.

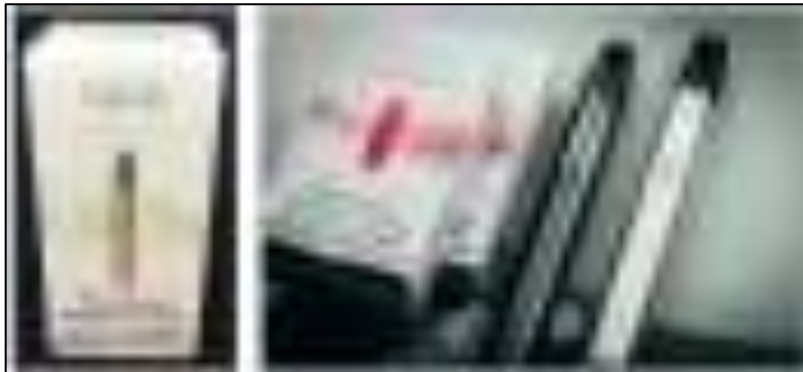


JUUL becomes a tarnished brand, Altria retrenches, and PMI advances plans for its own e-cigarette

As JUUL has become increasingly subject to lawsuits and regulatory limitations in the US, due to its viral uptake by youth, in early 2020 Altria distanced itself from JUUL by pulling back from its agreement. (ref. USA Today) This followed JUUL's halting sales of flavors, other than menthol and tobacco, and a US Federal ban on sales of sweet and fruity pod e-cigarette flavors. Also motivating was the fact that Altria's 35% share in JUUL, purchased for \$12.8B in December 2018, had declined by two thirds in value to an estimated \$4.2B by January 2020. (ref USA Today) Altria announced revisions to the Altria-JUUL agreement, including insertion of financial tripwires for invalidating Altria's e-cigarette non-compete agreement. (Ref. Altria Revises Terms of JUUL Transaction) Given the brand's challenges in the US, JUUL's most promising path forward may be via globalization, especially into markets with permissive regulation.

It is conceivable that Altria and PMI may decide to forgo JUUL and promote their own vaping product lines, perhaps in collaboration. PMI introduced the initial version of its e-cigarette MESH in 2016 and began test marketing in the UK in 2018. In May 2019, CEO Calantzopoulos suggested that PMI may release its e-cigarette, under the IQOS brand name, to a wider market. It seems unlikely that in the near future Altria will choose to market the present version of MESH in the US as the FDA has banned the sale of flavored pod-based e-cigarettes (other than tobacco and menthol) until they have undergone review and approval.

IQOS MESH which is limited to the UK, but may have broad international release in 2020.



From PMI 4th Quarter 2019 Report (February 6, 2020) with an "accelerated launch" of MESH 2.0 in Q3 2020.



SECTION 3. MARKETING OF IQOS

Overall IQOS Marketing Strategy:

IQOS has been marketed via a combination of traditional advertising, digital promotion via web and social media, sampling events, retail outlets, branded cafes and lounges, pop up displays, sponsorships (eg sports, art exhibits), and brand extensions.

Philip Morris Consumer Analyst Group of New York (CAGNY) Conference (2/22/2017).



IQOS Product Name

IQOS brand name, sometimes written as iQOS, is widely described as an acronym for "I Quit Ordinary Smoking." However, PMI's FAQs explain that IQOS is *"not an acronym but a brand name, created to denote an innovative product."* According to PMI, IQOS is pronounced (EYE-kose). The name of the product sends two clear messages to smokers: reduced risk compared with cigarette smoking and efficacy in smoking cessation through the transition to IQOS. Both of these implications are clearly at variance with the FDA's authorization for IQOS to enter the US market with the proviso that they do not convey modified risk messaging. The lead "i" is meant to convey a high tech association (as in iMac, iPad, iPod, iPhone). Alternatively, the "i" could also stand for "internet" or "intelligent."

The image shows the IQOS logo in a large, stylized font. The letters are blocky with rounded corners and feature a gradient that transitions from a bright green on the left to a blue on the right.

The text in the IQOS logo is blocky with rounded corners and has a bright green-to-blue gradient. The letters' shapes are bold and minimalistic but still comfortably soft-edged. In the same way, the color gradation may represent change, but the change is subtle and gentle. These carefully balanced

characteristics reflect IQOS's changing and switching narratives. The blue-to-green gradient connotes nature, calmness, and water vapor, which in turn connote a lack of combustible cigarette smoke. The teal color suggests the color scheme of the high-end jewelry company Tiffany & Co, which our evidence shows the brand sought to emulate in its marketing.

Special emphasis in the logo is placed on the Q, which dips lower than the other letters. Note the letter "Q" takes the distinctive shape of a tobacco leaf, perhaps a nod to tobacco leaves or IQOS' natural advertising theme. The Q is an important letter for the company, used in other IQOS-branded words such as Qreator, Qoins, and DISQOVR. This use of an uncommon letter to replace C may be an effort to appear unique, quirky, and modern.

IQOS Hummingbird

The hummingbird is the symbol Philip Morris adopted for IQOS packaging and advertising. The hummingbird is a symbol of vitality and innocence. Its speed and energy signify agility and health—cleverly selected qualities intended to counter the product's potential negative image due to health risks. Its color scheme is the same blue and green as the logo text. Its almost constant motion symbolizes change, a characteristic that aligns with IQOS's primary slogan, *"this changes everything,"* and the company's desire to be progressive and disruptive in its industry. The use of the bird and the color scheme is reminiscent of Twitter's blue bird logo, again creating a connection between IQOS and technology.

The Hummingbird is the visual identifier of the IQOS brand.



In the IQOS Users Guide, PMI explained its choice in the use of the hummingbird as its iconography: *"This promise and the revolutionary nature of the offer are encapsulated in the brand tagline: IQOS – this changes everything. Hummingbird: as a symbol of movement and transformation. In ancient civilizations: hummingbird was the tobacco bird."* (ref. IQOS Users Guide) Hummingbirds are pollinators of the tobacco plant and consume harmful insects, but they also have a role in the lore of tobacco. A design document for an IQOS boutique suggests that the *"unstoppable and untiring"* constant force of the hummingbird's wings may subtly reflect the company's persistence. (ref. GM Stand Design, 2018) The same document also hints at the bird's image of innocence: *"The image of the Colibri bird is the centerpiece...It is also supported by the origami Colibri birds floating in the air around the tangerine tree, they add a notion of innocence and simplicity."* This message of innocence is also conveyed in an animation made for the Qreator Institute in which a hummingbird flutters around the frame against a black backdrop, releasing fairy dust and a sparkling sound in a Disney- or Tinker Bell-like style. (ref. FatFox Animation, 2017)

According to Harry Crazington writing in the e-cigarette forum: *"The Humming Bird is the Tobacco Bird. In many Native cultures throughout the Americas, the Hummingbird has traditionally been associated with Tobacco plants as guardians and cultivators, earning them fame throughout the world and honourable names; Tobacco Birds, Medicine Birds, Doctor Birds, Birds of Magic, Rain Makers, LifeGivers, Suncatchers and more. Wherever Tobacco grows the Hummingbird lives. These birds and the Tobacco plants are so related, that should the Tobacco plant die, so would the Hummingbird or vice versa."* *"It was through the cunning and speed of the good-hearted Hummingbird that we have the use of Tobacco today. Many of our Tribal Elders and Storytellers have stories and knowledge of the Sacred Tobacco Bird."*

Hummingbird Creative team. (<https://vimeo.com/237749074>)

Project: Qreator by IQOS
 Client: Philip Morris International
 Agency: Momentum, Avanpost
 VFX: FatFox Animation
 Feather FX system, Lighting & Rendering: DiornFx
 Technical artist: Alexandru Baia
 Sound design: Avanpost

We have posted an IQOS hummingbird video on our SRITA website: tobacco.stanford.edu/videos/iqos.

IQOS Advertising Slogans:



The graphic features the IQOS logo in a stylized blue and green font, followed by the word "Slogans" in a large, bold, black sans-serif font. Below the title, there are five columns of slogans, each preceded by a category header in all caps. The slogans are listed with bullet points.

<p>CHANGE:</p> <ul style="list-style-type: none"> • This Changes Everything • Change Your World • Enter A New Beginning • Discover The Future • Change Your Game 	<p>SOCIALLY MORE ACCEPTABLE:</p> <ul style="list-style-type: none"> • No Ash • No Smoke • Hello Clean
<p>SAFER:</p> <ul style="list-style-type: none"> • Heat Not Burn • A Better Alternative to Smoking Cigarettes • The New Alternative to Smoking • IQOS is Always A Good Idea • 95% Less Don'ts • The New Way to Experience Heated Tobacco • Born From Cutting Edge Technology • Non Smoke, Only Steam 	<p>HELPS IN LOVE:</p> <ul style="list-style-type: none"> • This Changes Your Kisses • Change For Love • I Give IQOS To My Beloved Mother
	<p>PLEASURE:</p> <ul style="list-style-type: none"> • Hello Happiness • Hello Tobacco Pleasure • Hello Taste • Hello Summer Feeling • Be Creative

Heat Not Burn™:

PMI describes IQOS as a “*Heat Not Burn*” device – a category of products more accurately described as “*heated tobacco*.” Although the term is in widespread use by the media, as well as by IQOS competitors, “*Heat Not Burn*” is a trademark of PMI (serial number 86366668, August 2014). (ref trademark IQOS) The trademark spans many countries and regions.(Ref WIPO IP). PMI has filed actions in defense of its trademark against competitors such as British American Tobacco Company for its Glo product in August 2018. (ref Trademark challenge, Heat Not Burn Term) Interestingly, PMI also trademarked the terms “*Cease Fire*” (serial number 863218920, June 2014) and “*Cleaner Pleasure*” (serial number 86366651, August 2014). (refs PMI Trademark for “*Cease Fire*” and “*Cleaner Pleasure*”).

“*Heat Not Burn*”, “*Cease Fire*”, and “*Cleaner Pleasure*” are carefully crafted marketing slogans, no doubt rigorously evaluated by PMI for their consumer appeal, intended to differentiate IQOS from regular cigarettes. Each phrase has a strong connotation that IQOS is a more healthful product.

“Heat Not Burn” description permeates IQOS promotion.



Heated Tobacco technology.

Heatcontrol™ Technology

HEETS tobacco rods



A “*Heat Not Burn*” graphic trademarked for IQOS in Italy (May 2016) which we have not encountered in PMI advertising. (ref WIPO IP) On the right is proposed British American Tobacco graphic (May 2015) which remains inactive, presumably due to PMI’s action against it.



Change:

While PMI has used many different slogans in promoting its IQOS brand, the predominant slogan is: *"This changes everything."* There are numerous levels of meaning embedded in this slogan. First and foremost, it conveys the message that IQOS is a fundamentally new type of tobacco product. The slogan also implies that IQOS is a futuristic, high tech product than allows you to leave behind your old fashion, obsolete combustible cigarettes. It also has the unmistakable meaning that IQOS will change the user personally for the better. The use of *"everything"* promises the consumer that merely changing the choice of smoking method will result in a vast improvement touching on all aspects of life.

The signature IQOS slogan: "This Changes Everything." Note the Romanian ad with the term "Upgrade" and "More Intelligent."



<https://www.instagram.com/p/Bt8pxaahNqp/>

Simply Amazing:

In the fall of 2019, IQOS introduced a new campaign with the slogan *"Simply Amazing"* that featured adults enjoying little moments of everyday life such as walking, listening to music, or laughing in the company of friends. According to Andre Dahan, Senior Vice President of Marketing, at PMI, *"IQOS SIMPLY AMAZING is a campaign about changes that begin with each of us and open up new perspectives around. To let changes into your life, you need to live in the present, and not wait for the right moment."* The slogans *"Simply Amazing," "Enter a new beginning"* and *"Discover the future"* reinforces the association of IQOS leaving your problems behind and moving on to a better place. These slogans seek to position the emerging technology of IQOS in the realm of unique, wonderful, and the way forward.



https://snob.ru/news/182805/?utm_source=rss&utm_medium=rss&utm_campaign=rss

<https://instyle.ru/stars/news/simply-amazing-podelites-vashimi-emotsiyami/>

“Feel the power of amazing.”



We have posted videos from the IQOS “*Simply Amazing*” campaign on our SRITA website: tobacco.stanford.edu/videos/iqos.

Advanced Technology:

IQOS’s unique selling proposition include its luxurious, futuristic appeals and customizability. On the website are multiple links to technology claims made by IQOS that explain the advancements and novelty of the product. These articles often contain vague claims about the actual function of the product and feature futuristic images of the heating blade technology. They also assert that the blade is “*coated in Platinum and Gold*” to reference its luxurious qualities. These claims all provoke qualities of intelligence, making the connection that using IQOS is the smart choice, the smart thing to do, where you are given the intellectual freedom to make your own decisions in terms of which product, which HEETS, and which device color.

IQOS is promoted as an advanced technology device.



This device appears to be a proposal from the Ogilvy Agency. We are not sure if it was implemented, but it does reveal what PMI was considering for its IQOS brand.



<https://www.katemonsterross.com/#/iqos/>

IQOS is a Smoking Cessation Device:

Globally, IQOS makes unmistakable recommendations to use the product to quit smoking. In the US, where FDA authorization is needed for a modified risk claim, PMI claims that IQOS is not intended for smoking cessation. Many interpret “Q” in the IQOS brand name to stand for QUIT. We have posted a number of testimonial videos promoting IQOS smoking cessation ability on our SRITA website: tobacco.stanford.edu/videos/iqos.

IQOS Smoking Cessation Claims

- “**I Quit Ordinary Smoking**”
- “If you don’t smoke, don’t start. If you smoke, quit. If you don’t quit, change.”
- “Together we can Unsmoke the World.”

Japan website →



していきます。＊IQOSスポット:禁煙ながらもIQOSは使用可能な店舗

“IQOS Spot: a place where you can use IQOS while quitting”

U.S. website →



— Will IQOS[®] help me quit smoking?

IQOS[®] is not intended for smoking cessation.

IQOS promoted as “A New Alternative To Smoking.” Displays in a London IQOS store touting “The Benefits” of switching to IQOS.



Safer:

The IQOS name is aligned with the slogans that suggest it is a “new” and “better” alternative to smoking. The slogan “95% less don’ts” makes a scientifically unsupported claim as it is only true for selected potential toxins. The slogan “not smoke, only steam” makes the false assertion that IQOS only emits water vapor. The frequent claims that using IQOS is not smoking, ignores the presence of combustion products in IQOS aerosol. The slogan “IQOS is always a good idea” is obviously false as the use of IQOS by non-smokers, especially nicotine naïve adolescents would be a notably bad idea.

Steam is simply water vapor. IQOS aerosol is a mixture of glycerin, nicotine, combustion products, flavorant chemicals, and other compounds.



<https://jp.iqos.com> (From IQOS Japan website -translated via Google Translate)

Health Benefit Claims

IQOS is globally advertised as a means of replacing combustible cigarettes, is said to be a smoke-free, reduced-risk alternative. PMI has not been shy about stating the “*reduced risks*” of IQOS on their official websites and has actively made claims about the health benefits of IQOS. In their “*Future Without Smoke*” and “*Unsmoke*” campaigns, as well as on their IQOS websites, PMI explains that in smokeless products, “the levels of toxic substances in cigarette smoke are significantly reduced by up to 95% and, consequently, the consumer has less exposure to damage to their health.” Additionally, they further their claim by insisting that “*any product alternative that eliminates combustion and smoke is a better option for adults who would otherwise continue smoking*” due to the lack of ash and reduced exposure to harmful substances otherwise found in cigarettes. PMI advertises IQOS as a reduced-risk alternative tobacco product in which smokers are meant to quit cigarettes entirely but to stay with IQOS.



In an IQOS virtual reality (VR) commercial, the video does not refrain from boasting about the supposed health benefits of IQOS. The commercial takes place in a restaurant and the point of view is controlled by the viewer through a VR headset. The viewer is on a date with a young woman and has an IQOS on the table. It starts off with customers complaining about the smell of cigarette smoke from another table, which then turns into praise of the cleanliness of IQOS. Other customers join in and compliment the viewer on the choice to switch to IQOS and all the wonders it has done for him. The customers point out its “*smart*” look and how “*clean*” it is – both proxy terms for healthfulness. At the end, the waitress comes over to the viewer’s table and starts commenting on how the switch to IQOS has given him a “*glow*.” The viewer’s date proceeds to add that “*he looks good, he smells good, his fingers, his hair, he has his appetite again, he can taste strawberries, we’ve been going out a lot more, and going on walks. He’s a changed man.*” All these compliments hint at the health benefits that come along with IQOS and take aim at health risks commonly associated with conventional cigarettes. It is clear that this commercial markets IQOS as a healthier alternative to cigarettes and switching to IQOS can reverse the health detriments of cigarettes.

Advertisements highlighting the benefits of IQOS are also found on many of their websites. Some of the most emphasized points of IQOS are the health benefits of a lack of combustion and ash, as well as less stigma and secondhand smoke. PMI refers to IQOS as a smoke-free device, and on its IQOS websites, PMI often states how when smoking IQOS, tobacco vapor or aerosol is released, not actual smoke “*since the tobacco is only heated to 350°C, and in fact, not actually [burned].*” [We have this info in the sections on IQOS technology as well as smoke-free. Maybe we can create a summary para that encapsulates all the health claims]

PMI is adamant in their benefit claims to its users. On the Colombian and Romanian IQOS websites, there is a link to the IQOS Promises page (<https://www.iqos.ro/promisiunea/promisiunile-iqos>), which greatly appeals to users who would like to quit smoking cigarettes. The page asks users, “*What do you promise today?*” giving the viewer two options: “*I choose to switch from cigarettes to IQOS*” or “*I choose to recommend IQOS to someone dear.*” This page particularly gives smokers the feeling that by using and participating in IQOS’s “*mission*” they are doing something inherently good.

IQOS promise campaign - Romania and Colombia (7/30/2019).



Instagram is a large platform for iQOS pages to advertise the product. Although there hasn't been much overt advertising surrounding the health claims of IQOS, @iqos_ru recently posted about a partnership with a dentist where they marketed IQOS as a healthier choice for your teeth. Smoking is known to be very harmful and damaging to teeth and gum health, and this ad suggests that IQOS may be better for smokers' teeth and gums. After the dental event, there was a follow-up post on Instagram that spoke very highly of the results of their experiment with IQOS. In reporting on the webinar, the account @ru_beautiful_inst posted a before and after picture of teeth exposed to cigarette smoke and IQOS smoke for three weeks and compared the end results from the baseline. From the pictures, they concluded that "IQOS did not cause obvious tooth discoloration and color discrepancies between teeth and tooth resins, unlike cigarette smoke." Although the picture of the IQOS-exposed tooth is less discolored than the cigarette-exposed tooth, three weeks of testing IQOS may be too short to understand long term health consequences and. The company's subtle advertising surrounding the health benefits allows people to not only be intrigued by their product but possibly deceived by it too.

IQOS sponsored dental event that advocated health benefits of IQOS.



On the website for its "Unsmoke Your World" Campaign (<https://www.unsmokeyourworld.com>), PMI flaunts the slogan "If you don't smoke, don't start. If you smoke, quit. If you don't quit, change." The word "change," like "switch," suggests that one can move from cigarettes to other tobacco or nicotine products, thereby using those products as cessation devices. The Unsmoke page further offers testimonials of previous smokers who have switched to vaping or heated tobacco devices.

A post from IQOS Japan's Instagram account translated by Google translate promoting IQOS as a way to avoid lung cancer, emphysema, and myocardial infarction.



Laboratory demonstration by sales staff is performed in many IQOS stores comparing cigarettes to IQOS.



This advertisement appears to be a proposal from the Ogilvy Agency. We are not sure if it was implemented, but it does reveal what PMI was considering for its IQOS brand.

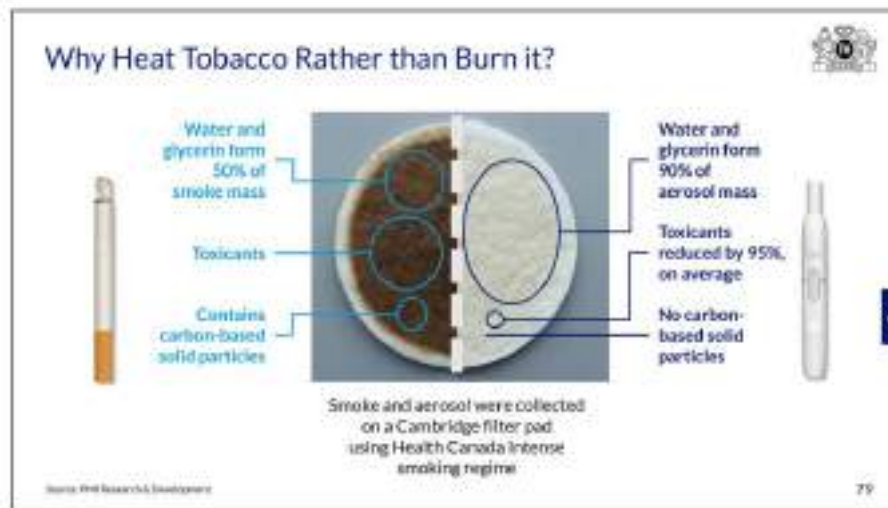


<https://www.katemonsterross.com/#/iqos/>



<https://www.katemonsterross.com/#/iqos/>

Illustration from Philip Morris Investor Information July 2019.



Socially More Acceptable:

IQOS advertisements tout that the product produces no secondhand smoke, less odor, leaves no ash and is thus cleaner. Other IQOS promotion claims that the product is environmentally responsible. However, discarded HTP butts are even larger than those for combustible cigarettes and IQOS generates e-waste including batteries and discarded devices.

Typical IQOS slogans emphasize clean, no ash, less odor, and pleasure.



IQOS Iluma ABSCENT perfume:



<https://vimeo.com/388051828>

In January 2020, a video was posted describing “IQOS Iluma” promoting the perfume “ABSCENT– The signature smell of Iluma.” PMI trademarked the name Iluma on December 12, 2019. ABSCENT is described as “A scent that smells like nothing at all” which is intended to convey the message that IQOS has no smell either. The launch video describes: “Keep the pleasure but lose the smell” - “With no smell, they can get even closer” - “Gift ABSCENT to someone who would like to lose the smell” – “Enjoyment may odorless, enjoyment made easy.” Gift bottles of ABSCENT are to be distributed with IQOS purchase. The video showed people hugging enthusiastically implicitly because they did not have repugnant cigarette odor. To market ABSCENT the video describes: “we launched a global influencer campaign.” This despite the fact that PMI has publicly stated that it no longer uses influencers.

A Korean Company produces perfume products called ABSCENT and offer a “P-Line” for personalized messages. This may well be the contractor for the IQOS scent product. (<http://abscent.co.kr/>). The company maintains an Instagram account with images of its product line. (<https://www.instagram.com/abscent.official/>)

In the IQOS Smell Test the sniffer is repelled by the smell of the cigarette users shirt: “yuck that’s disgusting smoker”



<https://www.youtube.com/watch?v=7axBdVk5Vlo>

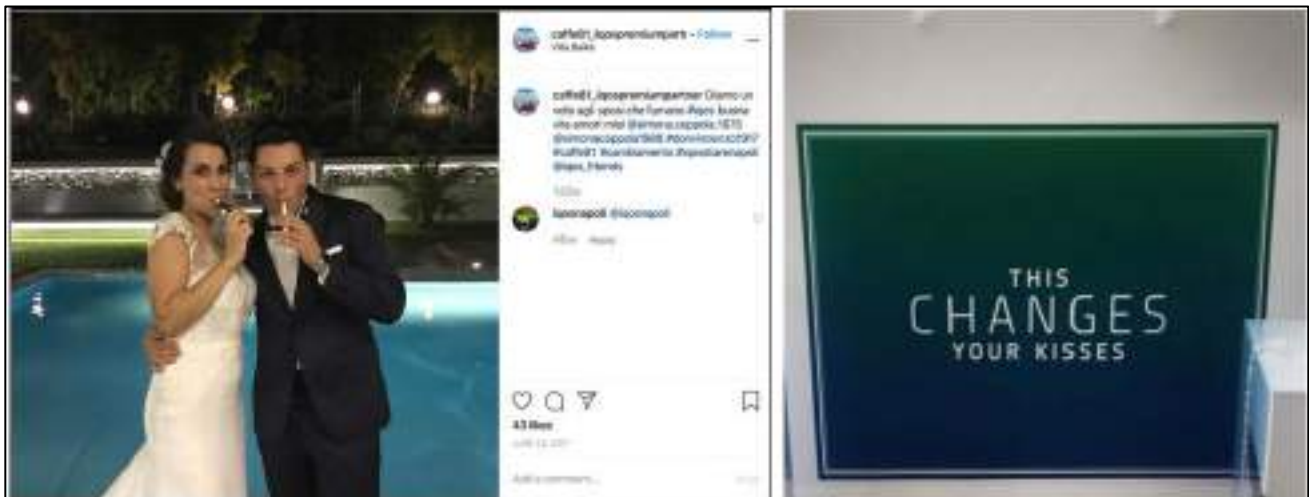
IQOS Helps to Make the User Successful in Romance and is a Way to Show Love to your Family

Like all traditional cigarette advertisements, IQOS advertising implies that if you use the product you will be more successful in your love life. Advertisements also imply that if you love your mother, father, or spouse you will encourage them to use IQOS.

Love and romance related IQOS advertisements.



Valentine's Day themed IQOS advertisements.



IQOS advertisements for Father's Day, Mother's Day suggesting that smokers "change for love."



Beauty:

IQOS is often paired with beauty and is promoted as something which will improve your appearance. IQOS ran an advertising campaign called Hello Beauty (*"This Changes Your Kisses"*), in which they partnered with fashion companies Douglas and Molecule F and branded their stores as *"IQOS Beauty Hubs."* Social media marketing for the partnership featured women holding IQOS devices the same color as their lipstick. Additionally, IQOS hires models to promote their product. For example, they partnered with Pophouse, a modeling agency in the Canary Islands, to staff many of their events. Because of this, IQOS staff will often be the most fashionable people at their events. They're people you want to emulate if you're concerned with being trendy, and they stylize the brand as cool and hip.

IQOS sponsored the cosmetics trade show Cosmoprof 2019 where they had a boutique with hired hairdressers. Their function, according to the Italian IQOS site: *"Between a stroke of the brush and one of the hair dryer, they will illustrate the fundamental advantages that IQOS can offer for the beauty of smokers, considering first of all the smell of the hair"* (translated). The description for this event also explicitly targets women: *"Many ex-smokers who have moved to IQOS report that they feel more comfortable in social situations, particularly for women who simply want to feel 'more right'... in every situation"* (translated). Other events, like those highlighting improved dental hygiene and IQOS' presence at the ZeBrush makeup trade fair, carry this theme beyond any one event.

Attractive models in IQOS advertisements.



Pleasure:

A universal theme of tobacco advertising is “pleasure.” IQOS is associated with happy times, friends, dining, desserts, summertime, romance, etc. An emphasis on pleasure is characteristic of any tobacco advertising, although the IQOS brand has modified that message to be more luxurious and less of a guilty pleasure. Rather than representing something like a break from work, IQOS is meant to integrate seamlessly into one’s lifestyle and actively refresh, like food or coffee. This fits well into modern life where there isn’t a clear distinction between work and relaxation or effort and reward. In an age of young influencers, people whose lives are their work, IQOS becomes a guiltless, non-interruptive way to indulge. As something central to one’s lifestyle, this indulgence could easily be seen as liberating or even healthful.

IQOS is often paired with sweets and cakes, potentially trying to associate the device with their sweetness. At events, IQOS often provides baked goods or cakes bearing their brand name, logo, or promotional slogans. We see it also in the frequent pairing of IQOS and chocolate, macaroons, and other sweets. The actual taste of IQOS is not a substantial focus. The reason may be that indulgence as an unhealthful break from one’s lifestyle is not something which really appeals to health conscious, busy millennials (whose style forms the basis of IQOS’s marketing).

IQOS attempts to make the connection between cooking food and “*cooking*” tobacco. Several different IQOS marketing events make the connection, trying to convince potential customers that the IQOS device doesn’t burn but instead cooks. In contrast with the sweet treats above, they do this because cooking seems healthy. IQOS sponsors cooking or food which is well-crafted and generally healthy. They have also sponsored the Cooking Without Combustion awards, which highlight chefs who use healthy, local, and raw ingredients. In this instance, the use of raw ingredients suggests little to no modification of the taste or the natural and healthful properties of what’s being consumed. One IQOS store likened how IQOS heats tobacco to the baking of bread. The product of this type of cooking seems wholesome, healthy, and homegrown.

IQOS is very often paired with both coffee and cafes more generally. The association is clearly about pleasure and flavor, more than anything else. This is made clear when considering IQOSignature stores (in Japan). In these stores, coffee is served in wine glasses alongside trays of sweet snacks. One is also shown which HEETS flavors taste best with different kinds of coffee. And even outside of Japan, IQOS has directly paired coffee flavors to HEETS flavors. As with caffeine, nicotine becomes a symbol of creativity and clear thinking. It’s not uncommon in advertising to see IQOS juxtaposed with coffee and a laptop. This also relates to a more modern lifestyle in which work and pleasure start to merge.

Along with the alcohol served at events, IQOS uses alcohol in a portion of its advertising. In terms of events, the brand participates yearly in Vinitaly, the world’s largest wine festival. Champagne figures prominently in the brand’s Instagram posts and news photos. In these examples, drinking is tasteful and light, solidifying IQOS’s high-class associations. It also helps to frame IQOS as a slow, mature source of pleasure. This is in line with what we see for the theme of cooking.

Qreative points to the importance of the leaf shaped letter “Q” to the brand. The company associates IQOS with creativity and individual expression (ie. the personal choice to use IQOS despite the possible stigma associated with smoking). IQOS established Qreator spaces to host artists along with IQOS promotional material.

Pleasure themed IQOS advertisements.



Youth Oriented:

While much of IQOS advertising is of a type which possesses appeal to underage youth (e.g., glamour, trendy young adult models, flavor varieties) relatively few of their ads appear specifically targeted to attract underage teens. The examples below are from Ukraine and Armenia.

Youth oriented posts on IQOS Ukraine and IQOS Armenia style Instagram pages.





<http://cabinafotoamelie.ro/portfolio-item/video-gif-boomerang/>

<https://geo.pro/reportage/466876-iqos-zone-cosmopolitan-summer-party/>

Targeting Women:

The Stefano Venkatachari advertising agency was hired by PMI to design IQOS advertising of appeal to “females . . . focusing on Japan where there is a cultural challenge.” The goal was to: “target women indirectly through careful aesthetic consideration” using “feminine hues”(pink) and “traditional national symbols” (cherry blossoms). The stated goal was to create an aura of “nurturance” (emotional and physical nourishment) around IQOS. “We cannot change traditions but we can appeal to an

individual's drive for change and improvement. By creating a positive emotional experience, we can build the trust that is needed to lift consumer adoption of IQOS."

Cherry blossom in a heart



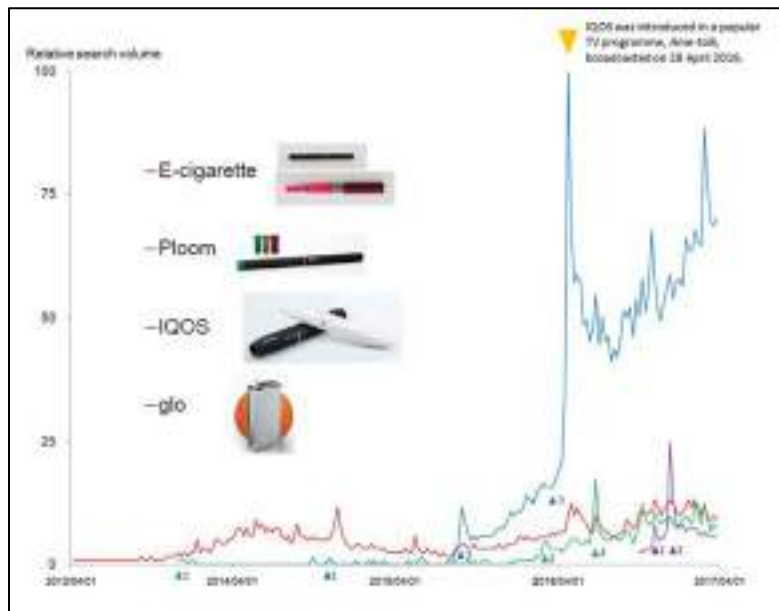
http://www.stefano-venkatachari.com/advertising/w_pmi.html



IQOS Television:

A popular 1 hour TV program in Japan in 2016 helped to launch IQOS to popularity in Japan. Ame-talk featured many popular Japanese comedians who discussed their IQOS use. In a study by Tabuchi et al, the launch of this show led to an enormous increase in Japanese Google searches for IQOS and led to a surge in market demand. The comedians effectively became early adopters who influenced their fans to try IQOS.

Google trends analysis due to its TV program in Japan.



Tabuchi T, Gallus S, Shinozaki T, *et al* Heat-not-burn tobacco product use in Japan: its prevalence, predictors and perceived symptoms from exposure to secondhand heat-not-burn tobacco aerosol. *Tobacco Control* 2018;**27**:e25-e33.

IQOS Videos

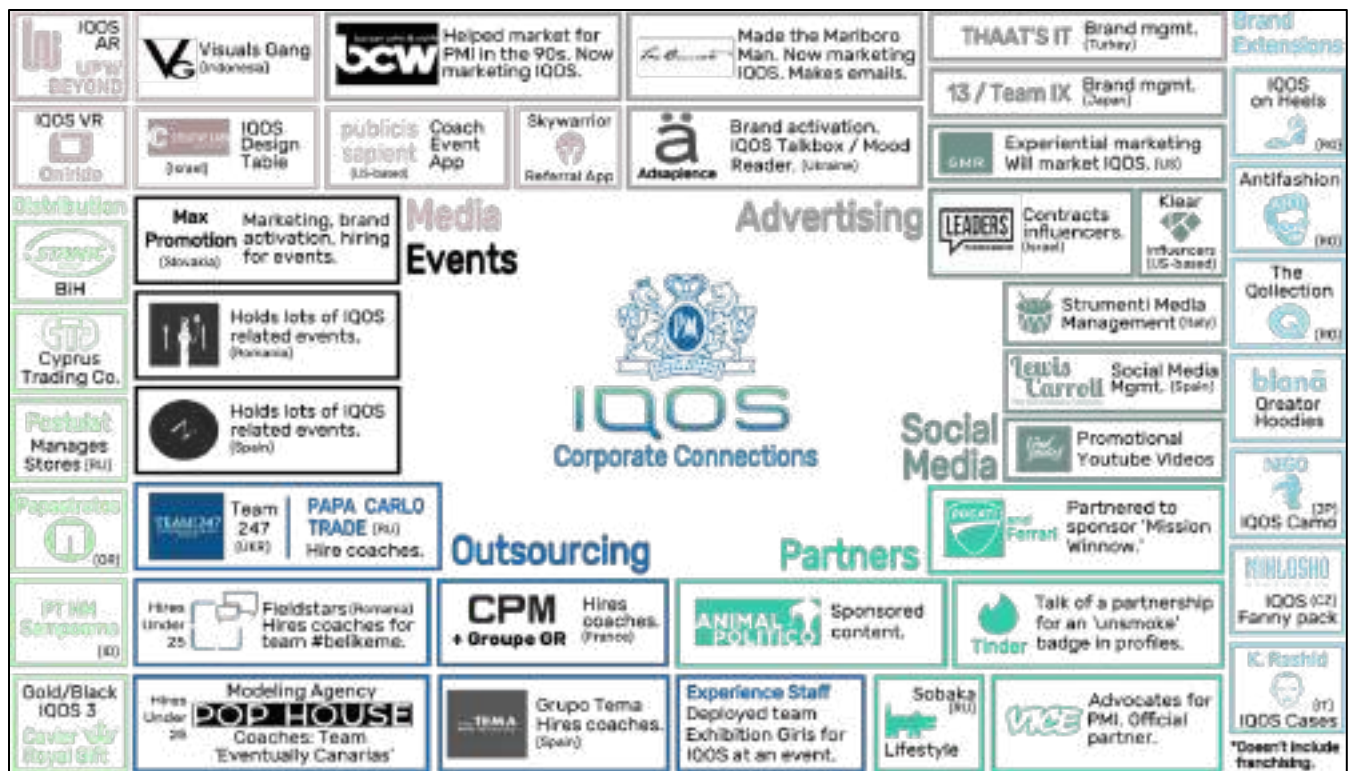
The SRITA collection of 111 IQOS videos (29 commercials and 82 event/parties/testimonials videos) cover a variety of topics. Many are splashy recordings of the highlights of IQOS promotional events at which free samples were provided. Others are revealing training video for coaches, influencers, and brand ambassadors instructing them in the brands marketing narrative. Video testimonials of cigarette smokers, professing how much IQOS helped them to quit smoking reinforce the reduced risk marketing theme. These videos sometimes carried campaign titles such as *“Evolution of me. Voices of Real Consumers.”*

IQOS Advertising Agencies:

Among the agencies contributing to IQOS campaigns are: Thirteen a Japanese creative agency owned by McCann Worldgroup, ad-comm group (<https://www.ad-comm.com/portfolio/iqos/>), Publicis One, Leo Burnett (<http://www.jake-starr.com/iqos>), Adsapience, BCW, Publicis sapient, Klear (influencers USA), THAAT'S IT, Team IX, and likely others.

Ad-comm described its goal for IQOS as: *“Creating Engagement and Aspiration Through a Dynamic Design-Centric Cultural Platform.”* They go on to describe that: *“Ad-comm was brought on board to help launch the brand (IQOS), creating and optimizing the brand’s appeal in Japan through an art and design centric lifestyle positioning element, and innovative digital augmentation activities.”* The described their scope of work to include: *“digital and social media activation campaigns, featuring opinion leaders and influencers.”*

IQOS Marketing is supported by numerous advertising agencies, social media promoters, event coordinators, media content producers, brand managers, modelling agencies, and talent recruitment agencies. The graphic below is a representative sample of PMI corporate connections in support of its IQOS brand.



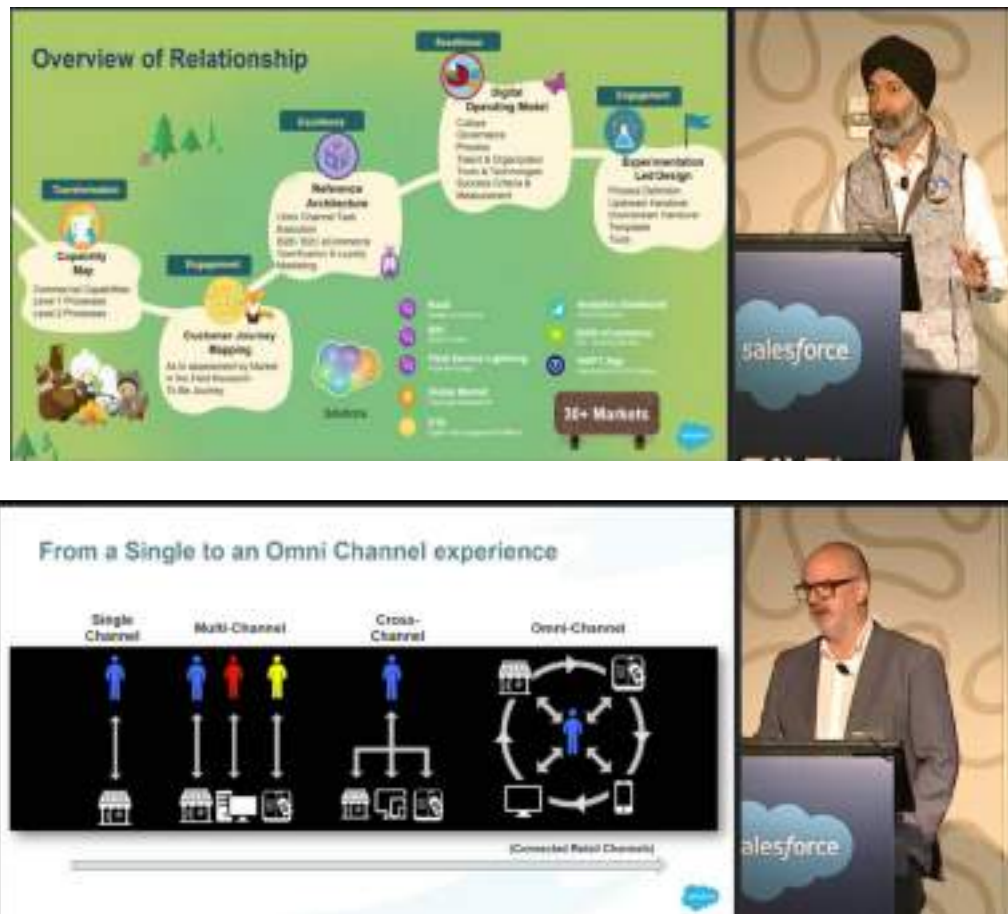
IQOS Social Media, Mobile Devices, Analytics, and Cloud Computing (SMAC)

PMI created a project for its emerging product portfolio which is dubbed SMAC-X. “Social media, mobile devices, analytics, and cloud computing (SMAC) have combined to create a technology ecosystem that supports disruptive and sustaining innovation.” (ref Cornerlius) “The availability of the SMAC platform connects customers to new innovations and supports commerce in both digital and brick-and-mortar stores.” PMI partnered with Salesforce to develop its SMAC program.

Images from PMI – Salesforce SMAC presentation.



<https://www.salesforce.com/video/1756657/>



IQOS APP acquires customer data useful for marketing purposes

Unlike PMI and Altria's primary product, Marlboro cigarettes, IQOS is Bluetooth connected enabling the companies to collect user information and provide insight into people's smoking habits. IQOS devices contain microcontroller chips that have the ability to store user data (ref Tech Insights). IQOS connects via an App available for Android devices. As of March 2019, the IQOS Connect APP had been download over 100,000 times. (ref Heat 180). The data captured and transmitted to the company includes the number of puffs (timestamped) and characterizes the user's routine such as average consumption per day.

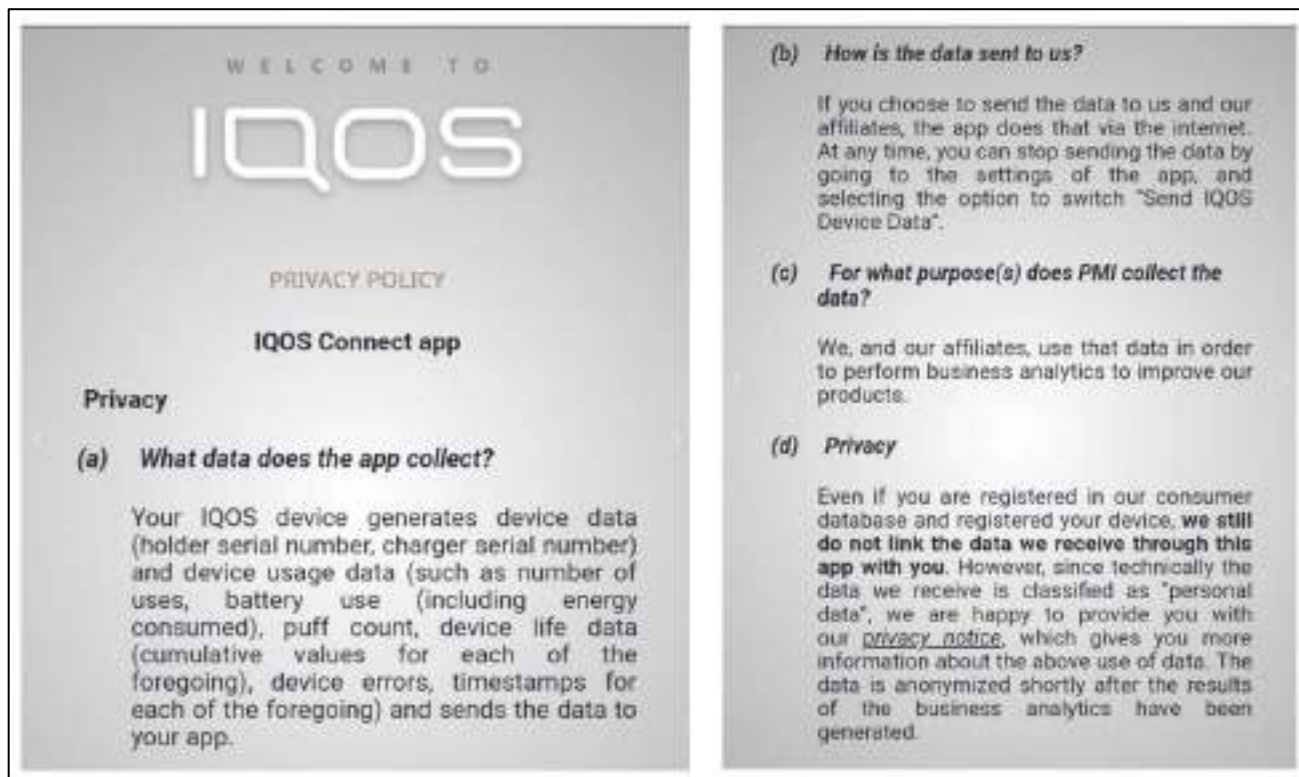
In a Reuters investigation (May 2018) of PMI's IQOS consumer data acquisition, PMI said: "No data information from the device is linked to a specific consumer, only the device." (ref Lasseter, Przewozniak) However, PMI's privacy notice indicates that the devices use data that is linked to the individuals to whom it is registered. Incentives, such as discounts, are offered to incentivize users to register their devices. The Reuter's investigation interviewed a former PMI project manager who tested the software in Japan and suggested that the data may be used for marketing purposes. The Reuters report quoted Gregory Connolly, a professor at Northeastern University in Boston who has studied IQOS technology and patents: "What they're going to have is a mega database of how Americans smoke." "Then they'll be able to reprogram the current puffing delivery pattern of the iQOS to one that may be more reinforcing and with a higher addiction potential." It also quoted Moira Gilchrist PMI vice president for scientific and public communications for the FDA advisory panel hearing as saying that the App may communicate to

the user: *"Hey, you haven't used your IQOS device today." "Have you stopped smoking, or is it because you've gone back to combustible cigarettes?"*

IQOS Connect APP for Android devices (see Section 5 for the IQOS Coaches App).



<https://apkpure.com/iqos-connect/com.pmi.store.PMIAPPM05578>



<https://heat180.com/understanding-the-iqos-connect-app/>

SECTION 4. IQOS SOCIAL MEDIA MARKETING

Social Media Strategy: IQOS Brand Voice Guidelines

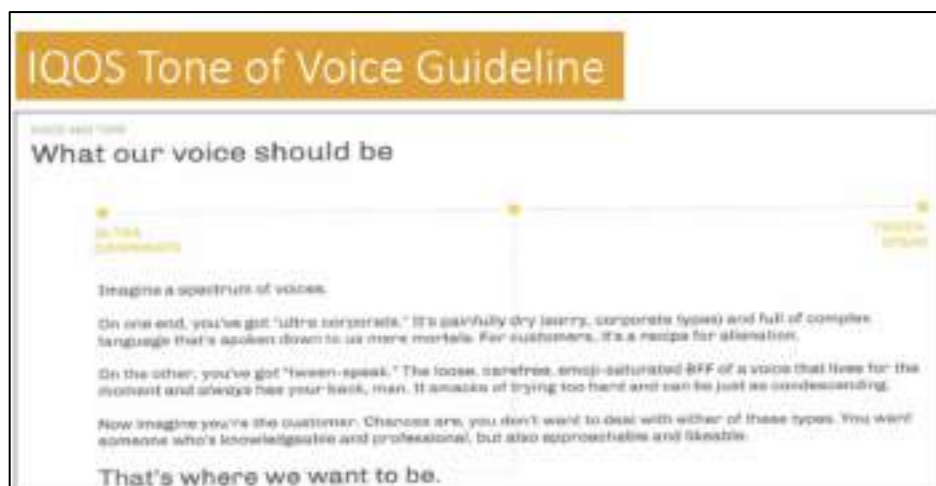
A 2016 slide deck presented to Philip Morris International IQOS social media team defined its Brand Voice Guidelines for a new product. The document divulges that, with IQOS, the brand was: *“venturing into social media for the first time in the parent company’s history.”* It goes on to acknowledge that: *“... despite having a number of limitations on what we can and can’t do and say... we have to know... we are in a box and know how to navigate within that box.”* Furthermore: *“Since the law is set up to prevent tobacco companies from promoting their products on social media and iQOS is a product that uses tobacco, you’ll always be walking in a minefield.”*

The document is clear in describing PMI’s use of social media for its IQOS brand will push the boundaries of propriety and perhaps even transgress them. It also seeks to draw a clear line between PMI’s traditional brand promotion and that planned for IQOS: *“PMI has corporate branding, style and language all its own, and what we’re doing for iQOS is completely independent of that. So, unless you’re told otherwise, don’t worry about PMI.”*



<https://www.documentcloud.org/documents/4331963-IQOS-Brand-Voice-Guidelines.html>

In its description of IQOS tone it seeks to avoid *“tween speak”* which it describes as a *“loose, carefree, emoji-saturated BFF”* voice. Tween refers to the preteens around 10-12 year of age. Remarkably, the plan seeks to avoid this genre not because of its youth appeal but rather because it *“smacks of trying too hard”* and can be *“condescending.”* The proposed voice emphasizes being *“approachable and likable.”*



2016 PMI Corporate Objectives:

In 2014, PMI laid out its ten years corporate affairs objectives and strategies emphasizing: *“Make normalization a PMI priority and imbed this mindset into the organization.”* (PMI Corporate Affairs 2014). The document links burnishing corporate reputation to achieving normalization. In terms of marketing, it refers to: *“Adopt campaign-oriented communications approach, utilizing simple, emotional, impactful, communication that is human and state-holder centric.”* PMI’s role in spreading photos and messages via social media propels the company’s work on its goal of normalizing its products.

2016 IQOS Social Media Specifications

The PMI social media plan for IQOS plan lays out the 3 planned social media platforms (Twitter Facebook, Instagram) as each having a different purpose:

Twitter: Customer service

Facebook: Product-driven content with an informative and educational tilt.

Instagram: Original lifestyle content to show how the product can become a vital part of a user’s everyday life.

IQOS brand voice guidelines (2016): “... original lifestyle content involving IQOS to show how the product can become a vital part of the user’s everyday life.”



<https://www.documentcloud.org/documents/4331963-IQOS-Brand-Voice-Guidelines.htm>



<https://www.documentcloud.org/documents/4331963-IQOS-Brand-Voice-Guidelines.html>

In January 2020, PMI listed two managerial level jobs for their IQOS digital marketing program. Four years after the company laid out its strategy, PMI's digital engagement of potential customers remains a corporate priority. *"Digital is a fundamental foundation for our ambitions, as so many consumers and smokers interact with brands and each other through digital touchpoints. The Digital function is responsible for creating experiences to motivate awareness, consideration, activation and loyalty; as well as the Digital Services required to enable these experiences. This team is helping to establish our modern communications vision, and lead the execution of new projects, capabilities and programs."*

Manager of Digital Partnerships (1/1/2020): <https://www.pmi.com/careers/job-details?id=18272>

Manager of Digital Advertising Content (1/1/2020): <https://www.pmi.com/careers/job-details?id=21922>

Twitter IQOS (counts as of Dec 26, 2019):

IQOS uses Twitter primarily to communicate with customers for product support although many IQOS posts from the community cover a variety of topics. #IQOS on Twitter contains many promotional posts from vape stores and testimonials from smokers. It also contains many posts critical of IQOS. IQOS Support Japan has the most activity on Twitter with 55,700 tweets and 23,900 followers. Philip Morris International's Twitter feed with 5358 heavily promotes is Smoke Free Foundation.

IQOS official Twitter pages.



Facebook IQOS

Facebook and Instagram, owned by the same mother company, have policies prohibiting paid advertisements for tobacco products. Nevertheless, unpaid organic marketing of tobacco products flourishes (ref Jackler Facebook). There are a number of official IQOS country specific accounts (e.g., IQOS Ukraine, IQOS UK, IQOS Romania, IQOS New Zealand, IQOS South Africa, and IQOS Italy). All these Facebook accounts, which are geo-restricted, we viewed via VPN.

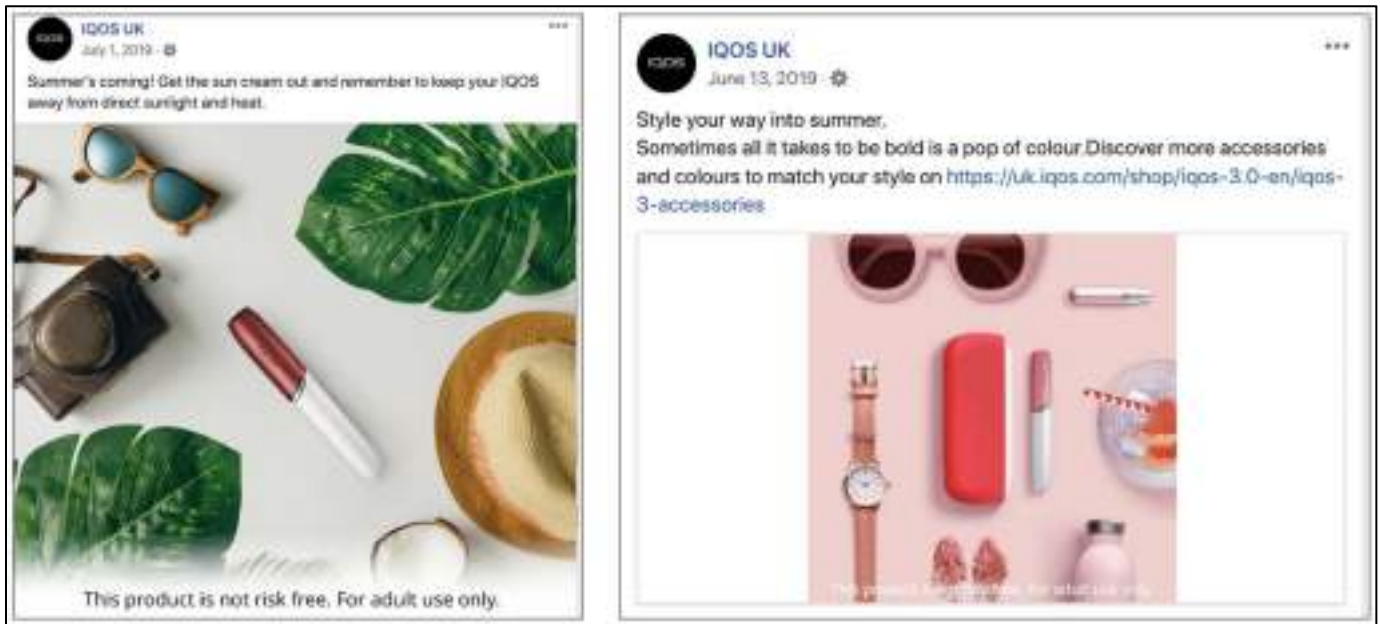
Many official IQOS Facebook posts are related to product and retail outlet information. This includes descriptive posts and video tutorials that teach individuals how to activate and clean the device, how to troubleshoot common problems, as well as the location and hours of service centers. In contrast to Instagram, IQOS Facebook posts of company origin tend to focus on the product attributes and less on lifestyle. In contrast to Twitter, which is more product support oriented, Facebook promotes product features and customizations and their stylishness, although some company posts include health reassurance messaging, event invitations, etc.

Community IQOS related posts

IQOS Italy Facebook announcement of two special events in November 2019.



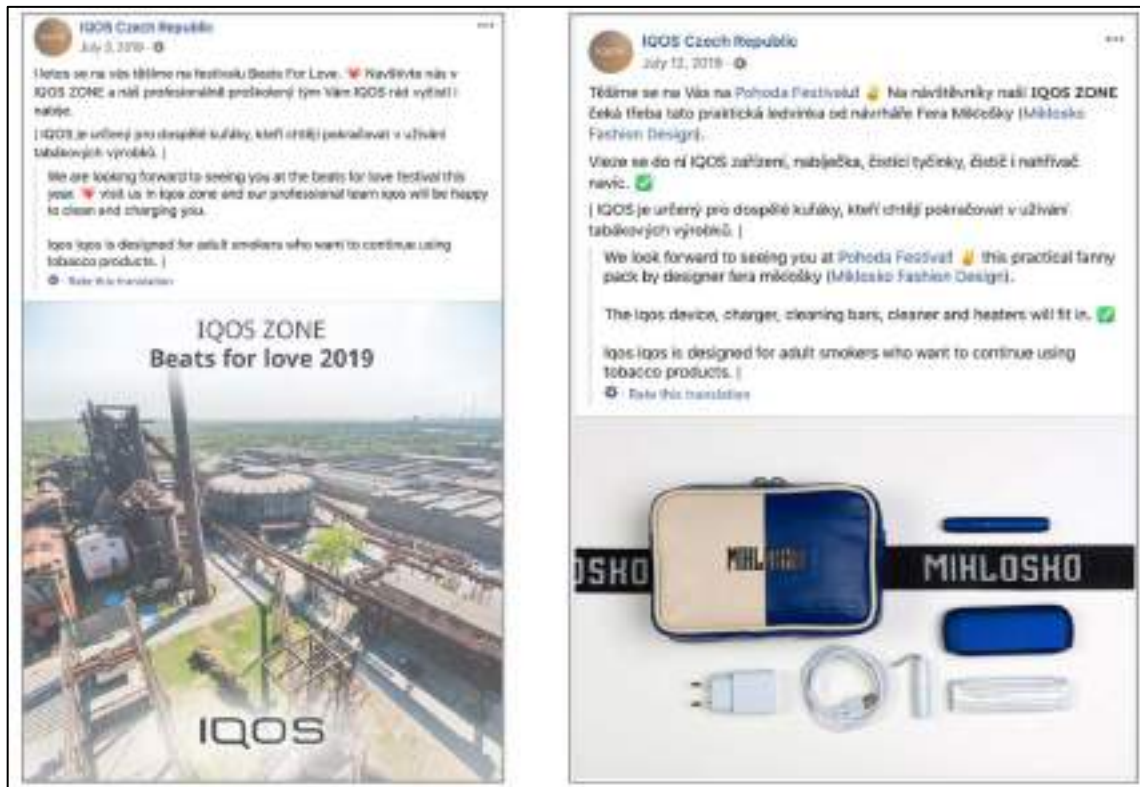
UK Facebook: Style oriented Facebook promotional posts.



South Africa Facebook: IQOS in sand and sun at the beach.

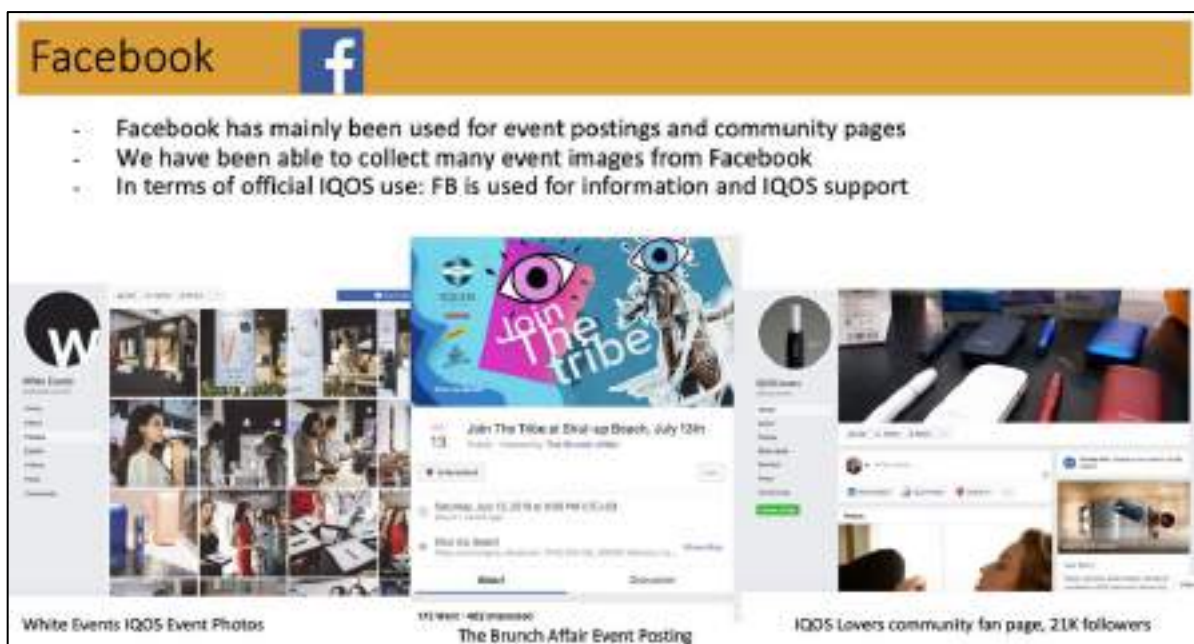


Czech Republic Facebook: Invitations for the annual “Beats for Love” dance music festival described as “four days of partying.”



<https://www.festicket.com/festivals/beats-love/2019/>

Community Facebook postings, not surprisingly, are more varied in their content the companies.



Instagram IQOS

Instagram, which is heavily used to promote IQOS, skews notably to younger audiences. In the US 67% of adults in the 18-29 age demographic use Instagram much higher usage rates for older age groups. (ref Statistica US Adults) Among US teens, Instagram and Snapchat are by far the most popular social media platforms with Facebook and Twitter well behind. (refs Statistica US Teens). According to a 2018 Pew research study, 95 percent of teens have access to a smartphone, and 45 percent say they are online *"almost constantly."* (ref Roesler Pew) The study found that among 13-17 year-olds 72% used Instagram and 69% Snapchat.

An impressive volume of Instagram posts appear on a daily basis from accounts containing the IQOS brand name. Some are clearly official brand sponsored IQOS accounts controlled by PMI. Other accounts appear to be brand affiliated due to the professional nature of the promotional posts, for example, with studio quality photography. Many accounts bearing the IQOS brand appear to have been created by community members. Accounts often mingle company and community posts. Ultimately, whether a post comes from the company or community may not diminish the impact on a consumer viewing the post. In fact, laudatory postings from the community may have greater credibility than one emanating from the company.

Official IQOS Instagram Accounts

As of fall 2019, we identified eight accounts on Instagram which appeared to be controlled by PMI. Only one of the accounts, @iqos_jp (Japan), has been verified by Instagram as an official company account, but this may be because it's difficult for a single company to have multiple verified pages. This Japanese account can be viewed only by approved followers who are registered IQOS owners and who claim legal age to smoke. The Japanese account has by far the largest following of any IQOS-related accounts, with 120,000 followers.

While not verified by Instagram, the seven other accounts appear to be company controlled. The evidence for this assumption is that the accounts are linked on the official IQOS websites of their respective countries, link back to the websites in their Instagram bios, follow each other almost exclusively, post professionally created content, and have matching usernames based on country. Further evidence of official status includes the fact that there was a PMI-hosted launch party for the Russian account, @iqos_ru. The seven official accounts aside from @iqos_jp are: @iqos (global), @iqos_it (Italy), @iqos_do (Dominican Republic), @iqos_co (Colombia), @iqos_ru (Russia), @iqos_ua (Ukraine), and @iqos_gt (Guatemala).

Although the account @iqos has no posts and is not clearly associated with a specific country like the other accounts are, its comments all seem to be in Romanian. At least three accounts are age gated, meaning users must agree that they are of smoking age before being able to see the accounts' content. However, except for in the case of @iqos_jp, which requires external verification, it is easy to get through the age gate: all a user has to do is have an Instagram account and press a button saying they are over 18. All but @iqos_it, @iqos_jp, and @iqos are geofenced, meaning only people residing in the countries associated with their respective accounts can access them.

The figure displays four screenshots of the official Instagram accounts for IQOS in different regions:

- Global:** The account is named 'iqos' and has 1,464 followers. The bio states: "This official IQOS account is used only for getting in touch with creative content creators who are adult, every of IQOS. www.iqos.com".
- Japan:** The account is named 'iqos_jp' and has 120K followers. The bio is in Japanese, mentioning "IQOS Japan" and "IQOS Japan is a community of creative content creators who are adult, every of IQOS. www.iqos.com".
- Russia:** The account is named 'iqos_ru' and has 47.7K followers. The bio is in Russian, mentioning "IQOS Russia" and "IQOS Russia is a community of creative content creators who are adult, every of IQOS. www.iqos.com".
- Italy:** The account is named 'iqos_it' and has 10.7K followers. The bio is in Italian, mentioning "IQOS Italia" and "IQOS Italia is a community of creative content creators who are adult, every of IQOS. www.iqos.com".



Advertising Themes of Official IQOS Instagram Accounts

The advertising themes that PMI uses in its official Instagram accounts mimic the techniques that tobacco companies have historically used to promote their brands. A common theme is pairing IQOS with coffee, alcohol, and food, which normalizes IQOS as a social activity, and implies it is something to be consumed every day. Other posts are clearly classifiable as masculine or feminine, with strong pink and blue color schemes accompanied by men's and women's clothing and accessories, respectively. Similar to e-cigarette advertising tactics, posts suggest IQOS as a Mother's Day or Father's Day gift to help parents switch. Other holiday-themed posts focus on Christmas and New Year with festive colors, designs, and Christmas trees.

Another subset of posts portrays romance, with the suggestion that IQOS will bring people closer together or make a partner more attractive. Along similar lines, many posts have a social theme and portray jovial people gathered at parties or meals and using IQOS. This association sends the message that IQOS will help the customer have an active, lively social life. As with all tobacco advertising, sex appeal is front and center. On the Italian and Japanese pages, another significant thread is sports and outdoor activity, a health-connoting theme that has long been similarly used in cigarette ads. One IQOS advertising theme, absent from cigarette advertising but common among e-cigarettes, is smoking cessation. Other less common but noteworthy themes include travel, technology, and relaxation. Although it's difficult to generalize when most of the official accounts are geofenced, the posts that are accessible are, as a whole, fairly well composed, neutrally oriented, and unextraordinary in comparison with its industry competitors and predecessors.

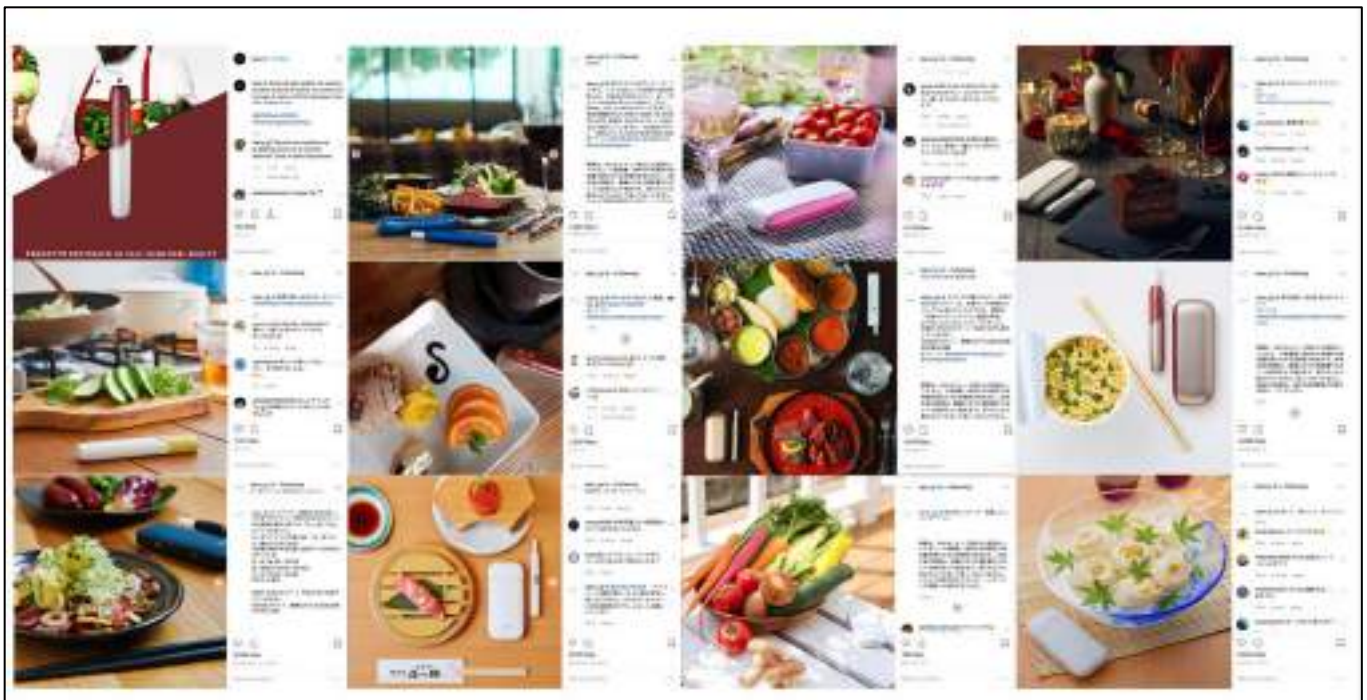
Giveaways, which feature prominently on the Japanese account, appeal to price-sensitive youth. In a post from August 13, for example, @iqos_jp posted a *"summer lottery"* in which a simple comment enters users into a giveaway with 100 winners who will all receive an IQOS 3 or IQOS 3 Multi in addition to accessories such as cases, caps, and mobile batteries. Other posts on the Japanese account promote events, collaborations with artists, and the opening of IQOS friendly places. The account occasionally reposts photos from community IQOS users who agree to use and confirm that they are of age (25 for all people in the photo, 20 if no one is in the photo).

Official accounts have some limited interaction with their followers. Most notably, the official accounts—some more frequently than others—comment on individual users' original IQOS-containing content asking permission to use their material. In these comments, the official accounts link their terms and conditions and ask the user to reply with a permission-granting hashtag that begins with #okiqos and has a country-dependent ending, such as #okiqosit for Italy. Photos with people require everyone in the photo to be at least 25, and photos without people require the user to be of legal smoking age in their country. Only IQOS Japan seems to repost some of the photos, and it is unclear how the official accounts choose the photos on which they comment and what most of the accounts do with the material.

Coffee and Tea themed ads on IQOS's official Instagram pages for Italy, Colombia, and Japan.



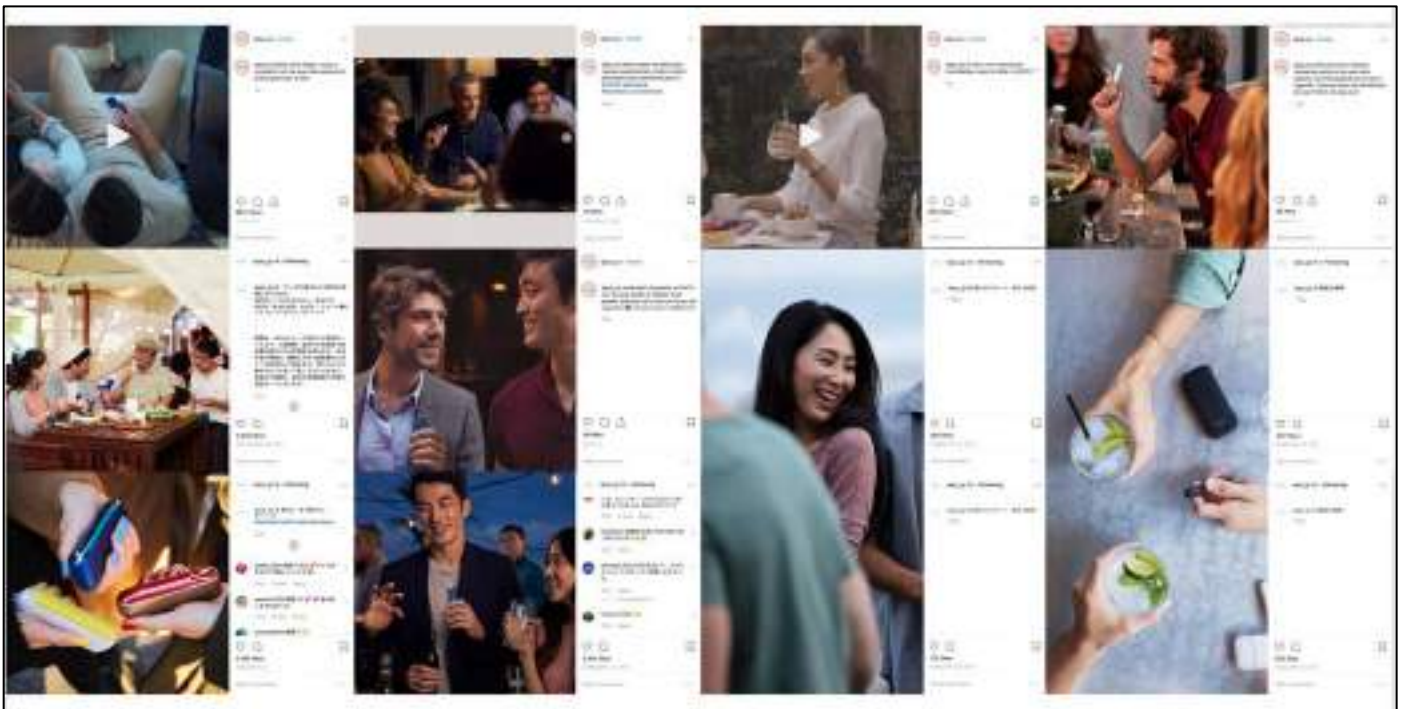
Food themed ads on IQOS's official Instagram pages for Italy, Colombia, and Japan.



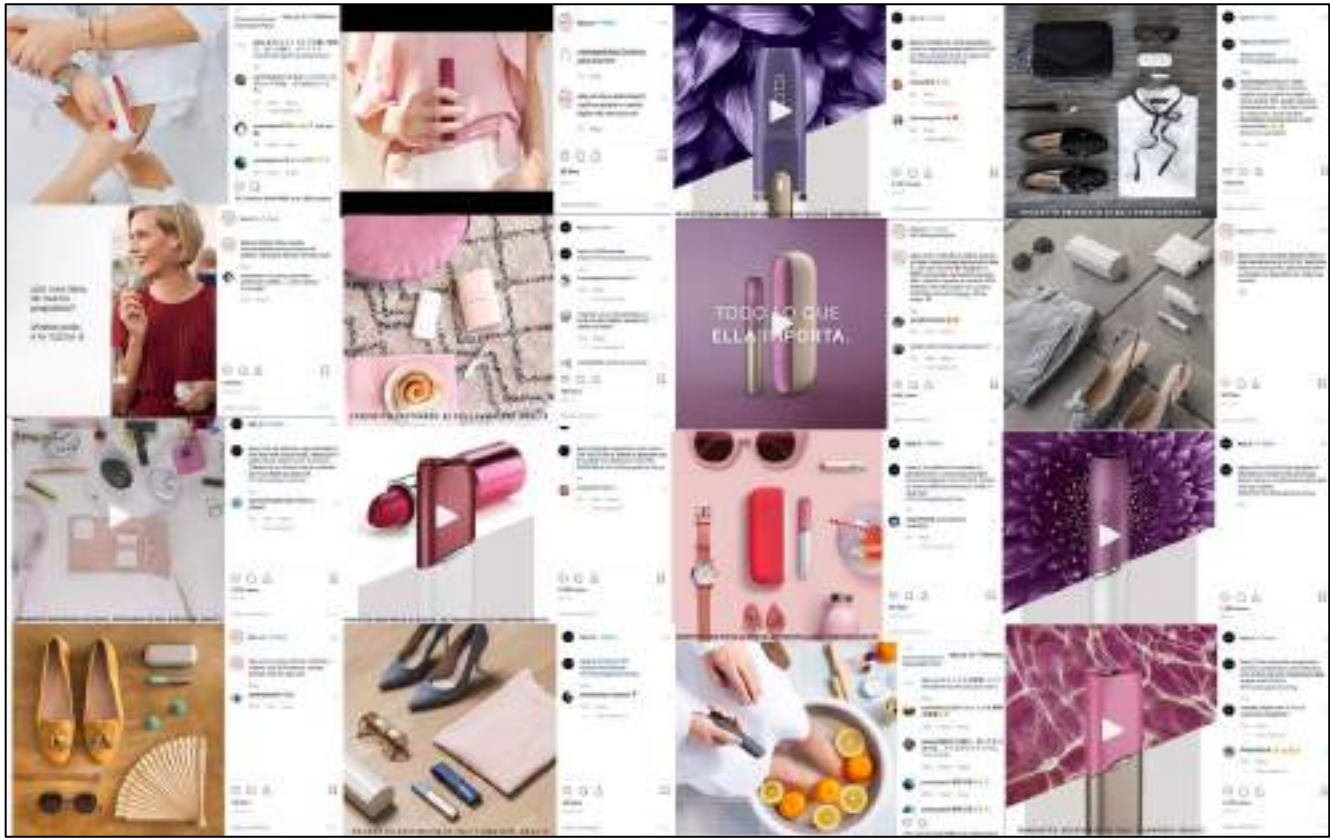
Alcohol themed ads on IQOS's official Instagram pages for Italy and Colombia.



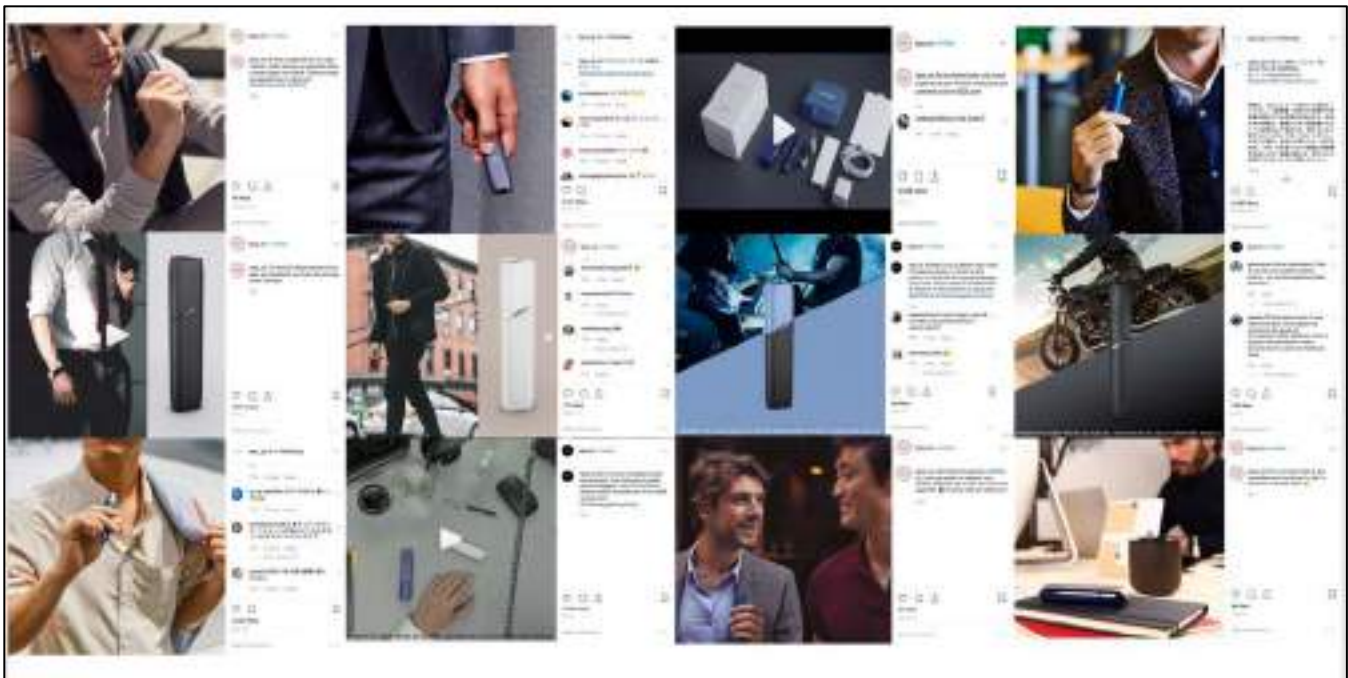
Social themed ads on IQOS's official Instagram pages for Italy, and Colombia.



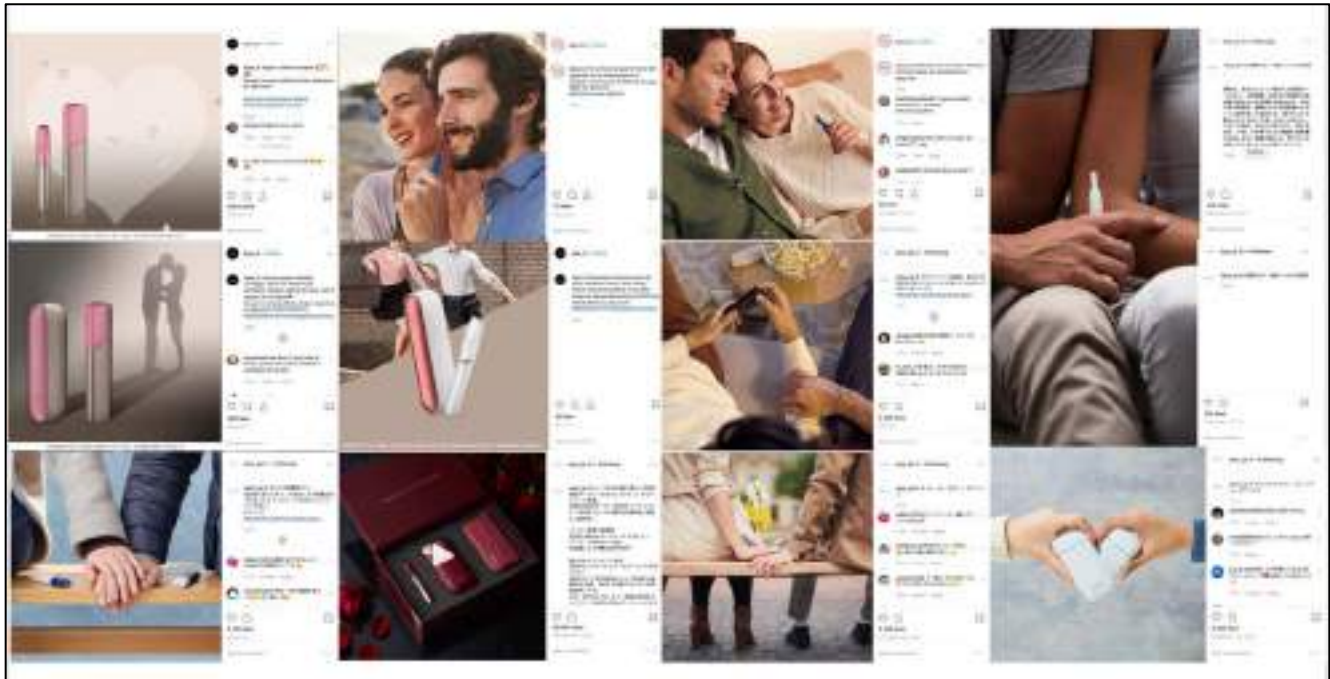
Feminine themed ads on IQOS's official Instagram pages for Italy, Japan, and Colombia.



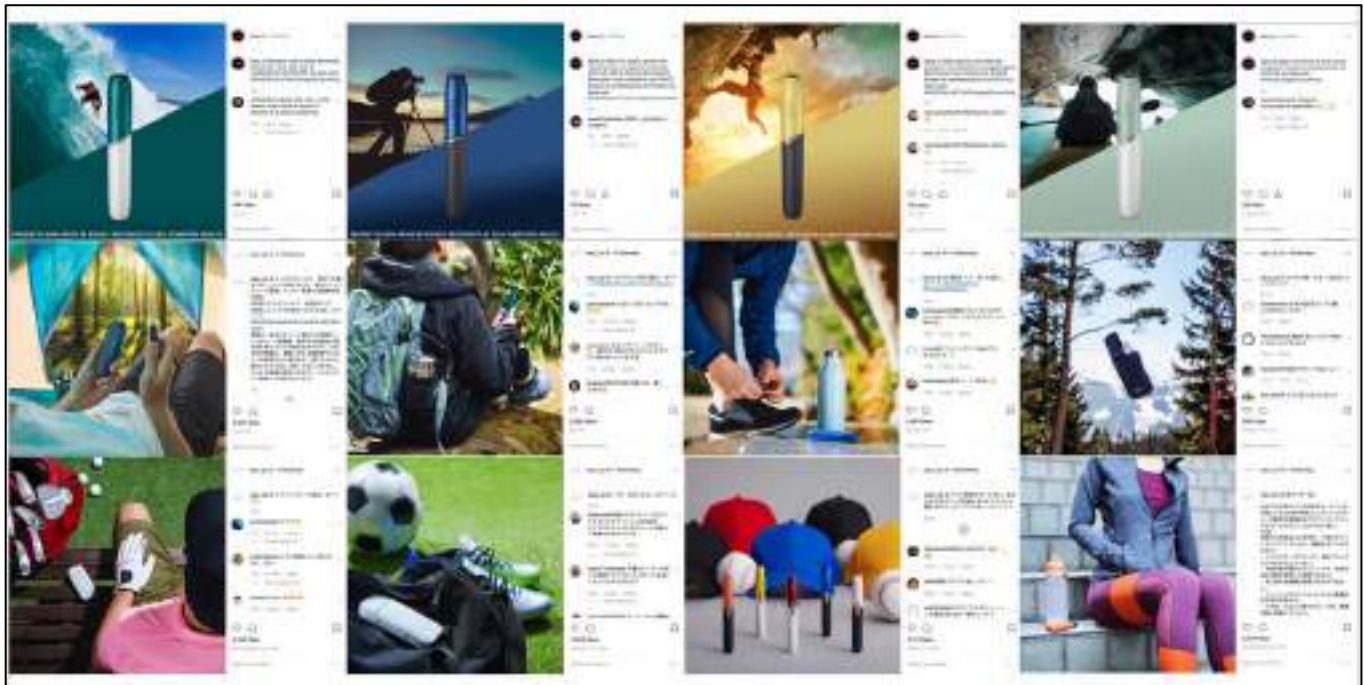
Masculine themed ads on IQOS's official Instagram pages for Italy, Japan, and Colombia.



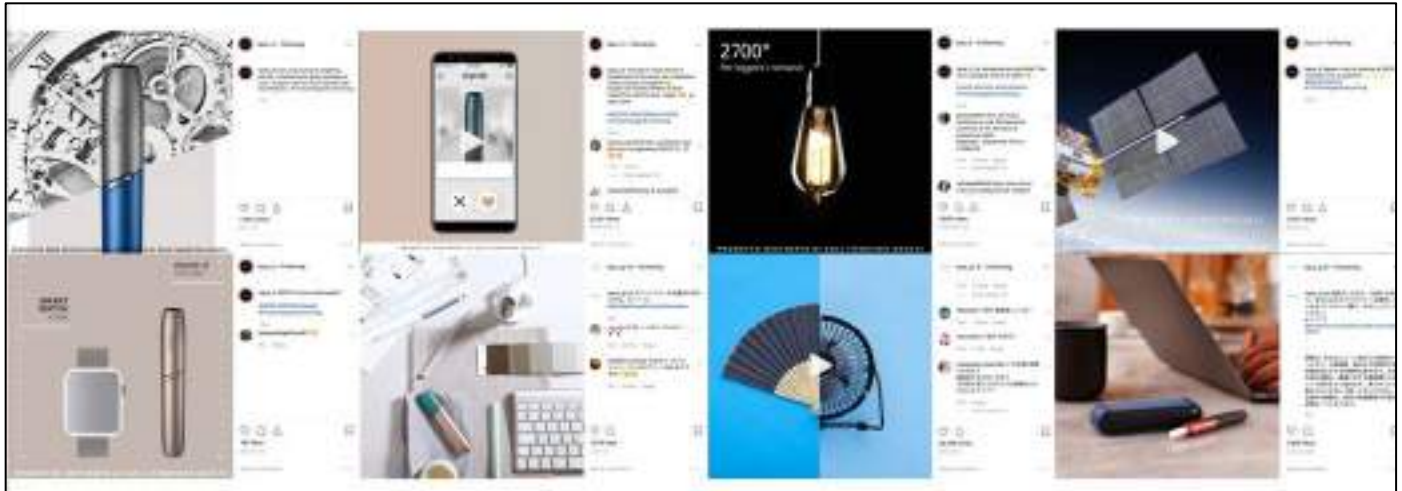
Romance themed ads on IQOS's official Instagram pages for Italy, Japan, and Colombia.



Sport and Outdoor themed ads on IQOS's official Instagram pages for Italy, Japan, and Colombia.



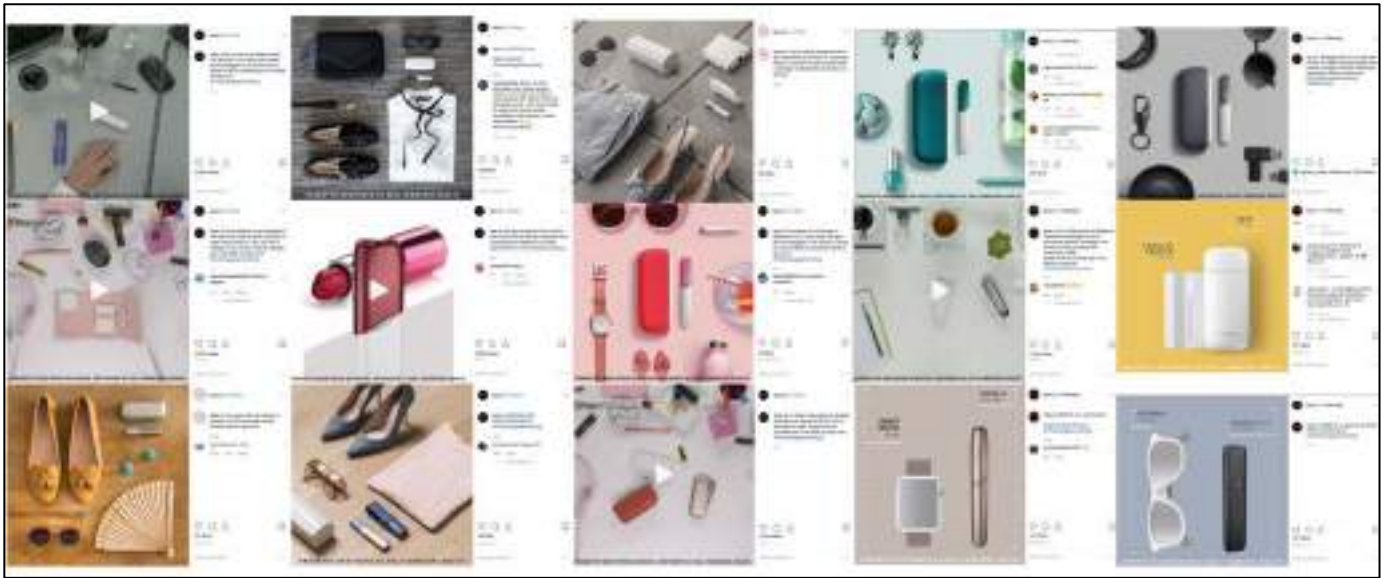
Technology themed ads on IQOS's official Instagram pages for Italy, Japan, and Colombia.



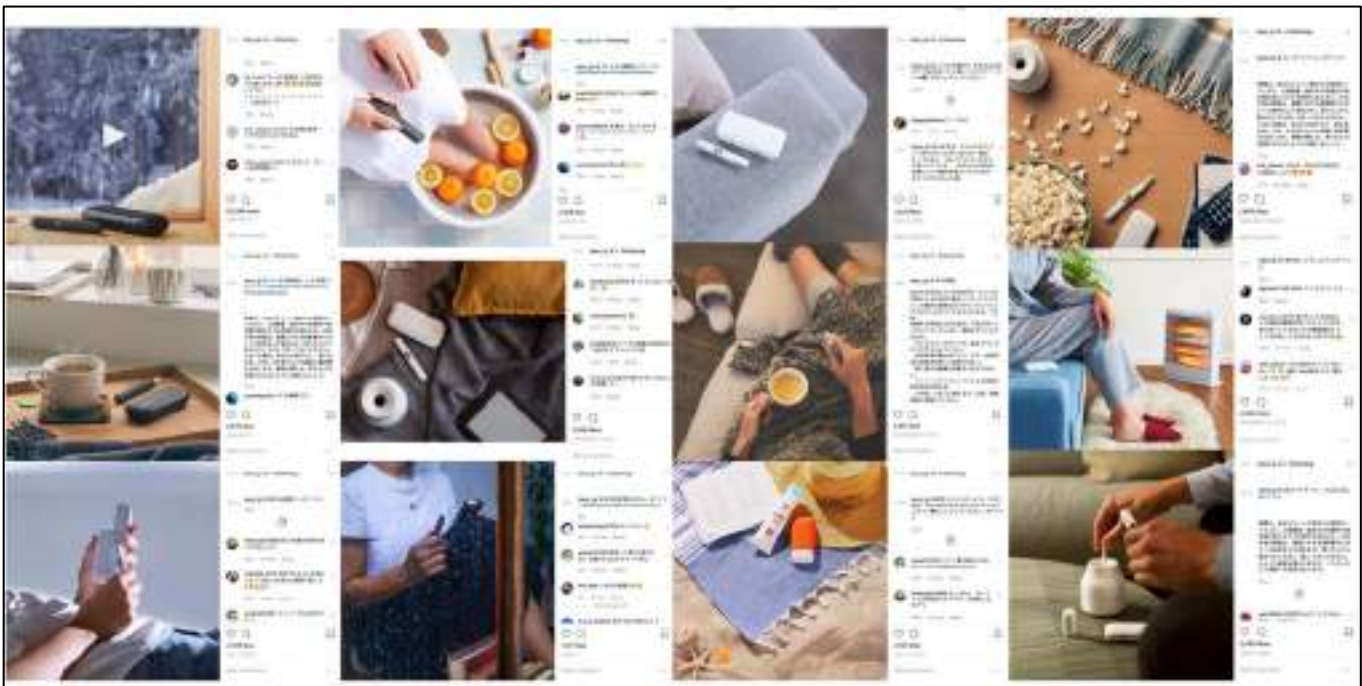
Nature themed ads on IQOS's official Instagram pages for Italy.



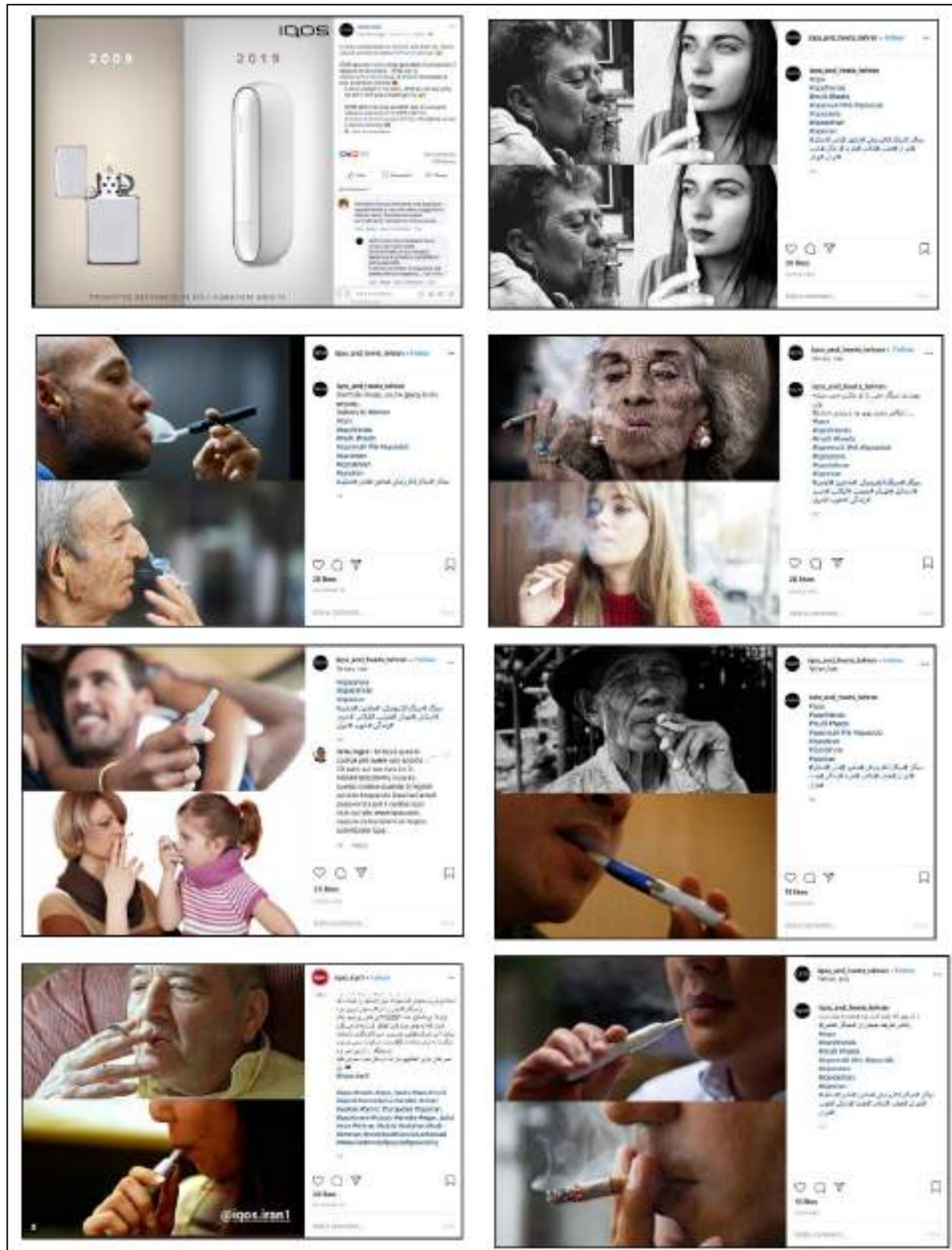
Accessory themed ads on IQOS's official Instagram pages for Italy and Colombia.



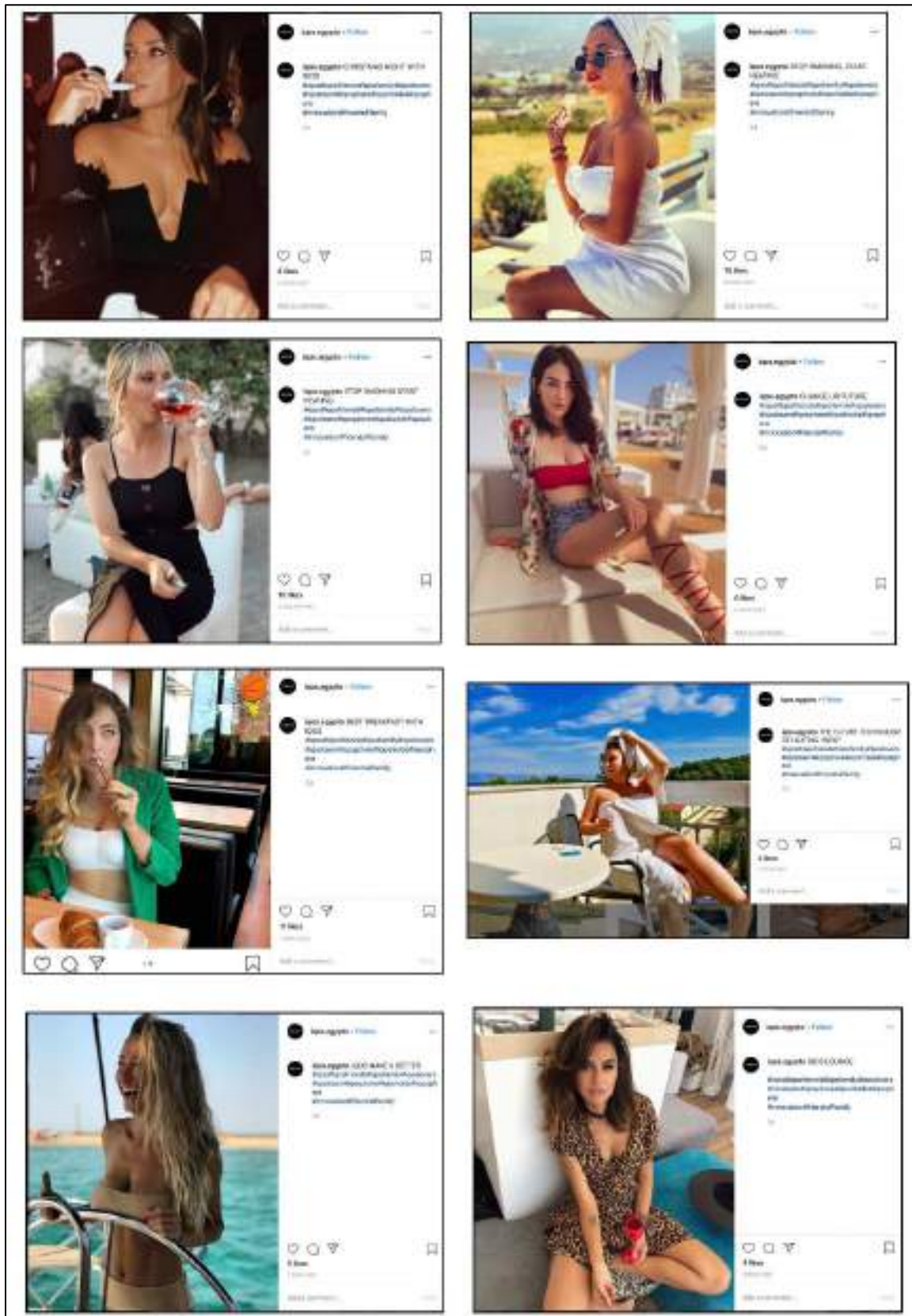
Relaxation themed ads on IQOS's official Instagram pages for Italy and Japan.



Smoking Cessation Themed Ads.



Sex appeal themed ads posted to the Egyptian Instagram IQOS Account.



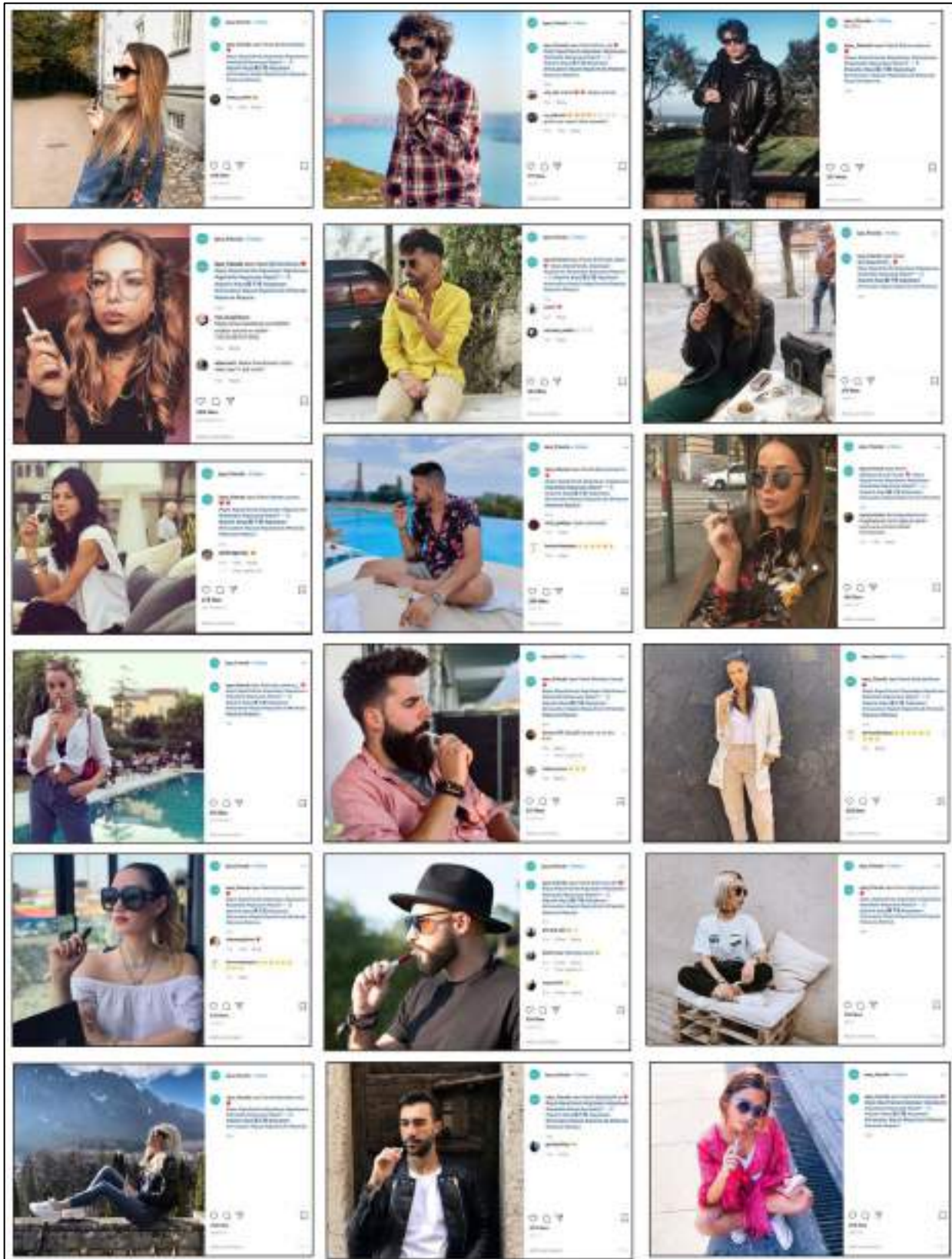
IQOS Friends

IQOS Friends, or @iqos_friends, is an Instagram account that exclusively posts IQOS-related content with the tagline “*IQOS Friends from around the world.*” Whether or not the account is affiliated with PMI, its page is attention grabbing and easy for members of the public to find; as of July 2019, the account had just reached 54,000 followers (12/2019) and is one of the largest IQOS-related accounts on Instagram. The account is involved in an extensive online network in which IQOS users tag @iqos_friends in their photos, and the account tags them when it reposts their content. Many of its posts are content from users in the community, making the account a gallery featuring the lifestyles of IQOS users and brand ambassadors from around the world in addition to photos of IQOS events and devices. These photos clearly glamorize the use of the device. Many show casually dressed young models posing with IQOS, and others are posted directly from parties.



There is some evidence that IQOS Friends may be connected to PMI; however, the link is not definite. If @iqos_friends is run by PMI, then the account is indicting in that it has posted content from users under the age of 25—a violation of PMI’s standards and vows to eliminate such activity. If @iqos_friends is not affiliated with PMI, then the account is still troubling. IQOS coaches, who are PMI employees, tag and promote the account. This company recognition of the youth-oriented account’s reach and influence as well as the promotion of its activity conflicts with the company’s claims of social responsibility. Our research team was further concerned by the fact that two community members who had been featured on the page whom we contacted believed the account is official despite a lack of evidence in one direction or the other. The fact that casual Instagram users believe they’re interacting with an official, PMI-run account emphasizes the impact of @iqos_friends and gives import to its posts featuring underage teens. Even if @iqos_friends is unofficial, then the account is an indication that IQOS-related media has taken on a life of its own, making its youth-oriented promotion even harder to regulate.

IQOS Friends: Casually dressed IQOS users – community created, posed by PMI marketing, or both?



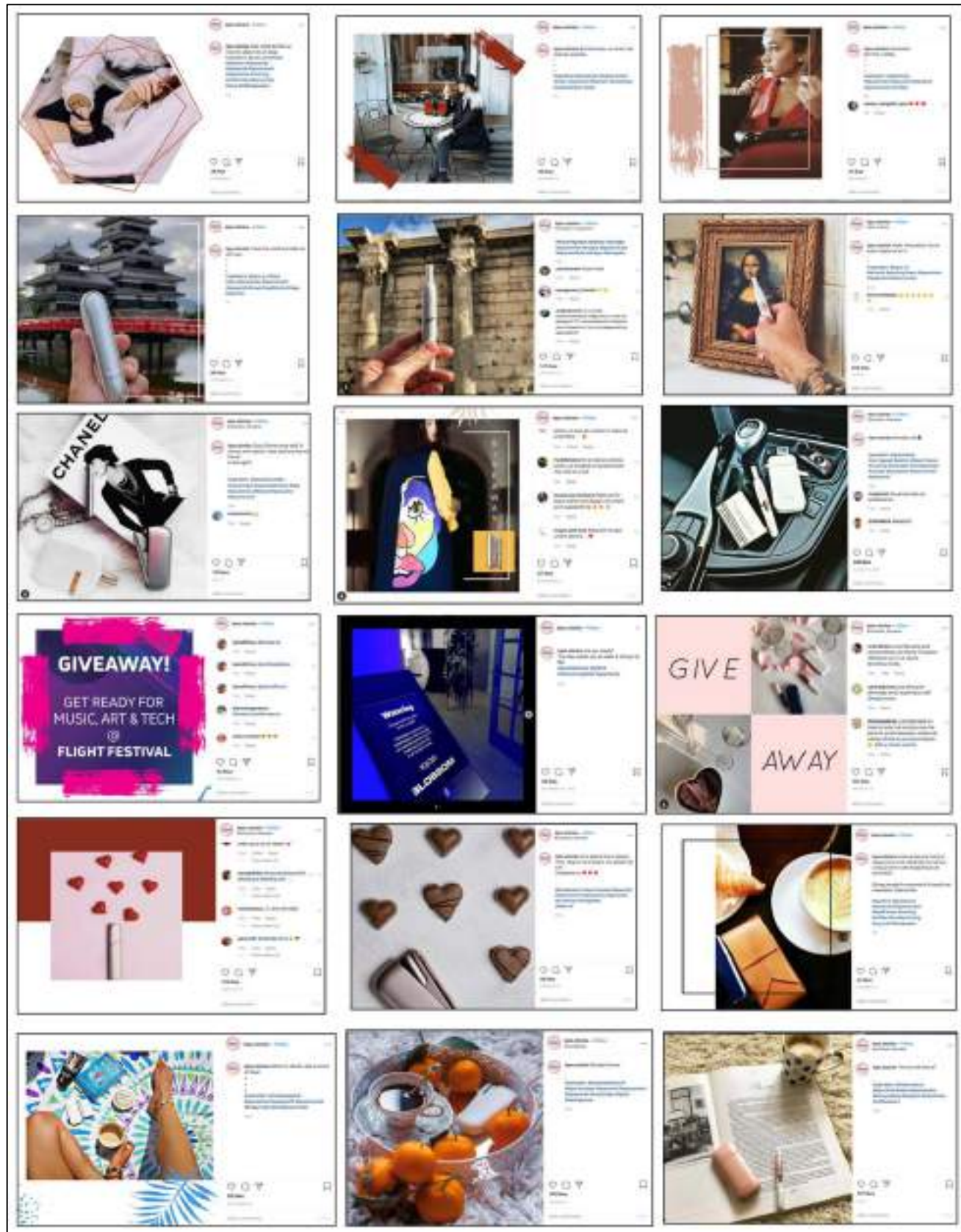
IQOS Stories

IQOS Stories, or @iqos.stories, is a Romanian-based, globally popular Instagram account with over 10,000 followers (11/2019) with posts that are exclusively IQOS-related content. *"A place made to bring people together & create out of the box experiences"* which posts *"IQOS stories from around the world."*

There is no direct evidence of a connection between IQOS Stories and PMI, however, the images appear more professional work product than amateur community contributions suggesting the hand of the company or its marketing contractors. @iqos.stories regularly reposts original content and photos from other IQOS pages, often with added collage elements; event posters; giveaway posts for IQOS products and event tickets; and photos of IQOS arranged with accessories, food, and artistic backgrounds. In contrast to its counterpart @iqos_friends, alongside which @iqos.stories is often tagged by users, @iqos.stories appears to sometimes post original content. @iqos.stories is tagged in the posts of many coaches, brand ambassadors and influencers, and casual IQOS users, indicating that community members find the page important or influential.



IQOS Stories: Appear professionally composed and are likely to be of brand origin.



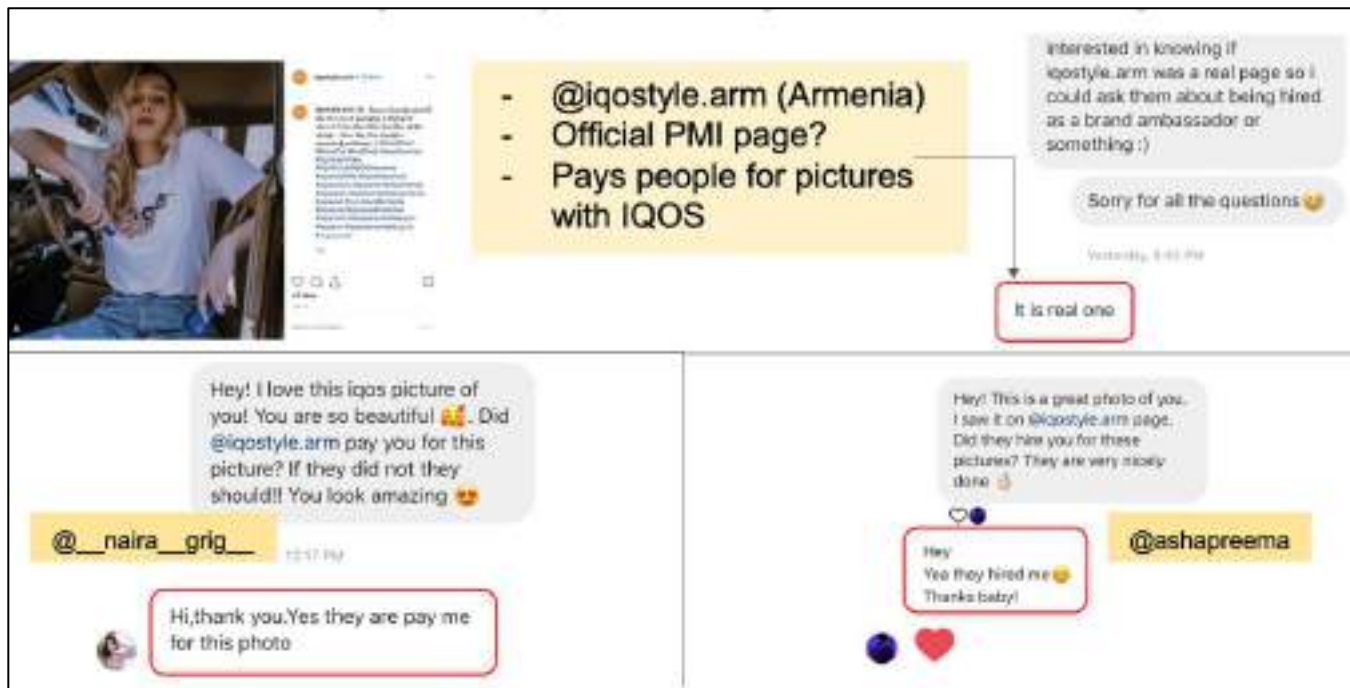
IQOS Style Armenia

Instagram @iqostyle.arm is an unconfirmed, but likely official, account that posts exclusively IQOS-related content. The account posts attractively arranged bird's eye layout photos with IQOS devices as well as professional-appearing photos of carefully posed models. The high quality and attractiveness of the photos and models on @iqostyle.arm, like most IQOS promotional material, portrays the device as a luxury item or accessory that belongs in posed, fashionable photos.



As with many other IQOS Instagram accounts, it is uncertain who runs @iqostyle.arm (over 6300 followers in 11/2019). Although its photos are of professional quality, its handle is very distinct from the official, country-coded @iqos accounts. However, there is evidence that it is affiliated with PMI through an advertising agency. To begin to understand the account's ownership, our research team direct messaged many users featured on @iqostyle.arm. The three users who replied back said that they were hired or paid for their photos, either directly by "IQOS Armenia" or through a hiring agency that they did not name. While these responses do not conclusively tie @iqostyle.arm to Philip Morris, it is likely that the hiring agency does form that link. The hiring agency mentioned is very possibly Zuck&Berg Creative Agency, an advertising firm in Armenia. Zuck&Berg is definitively linked with PMI: they posted original advertisements for IQOS on their Facebook page, they made gifts branded with both the Zuck&Berg and IQOS names, and their executives attended the IQOS 3 launch party in Ukraine. The connection between Zuck&Berg and the @iqostyle.arm account is less certain, but there are indications that the two are connected. Early in the @iqostyle.arm page's history, it posted the same IQOS video that the Zuck&Berg Facebook account had posted that same month (March 2019). Additionally, one of the models featured on the @iqostyle.arm page, David Gharibyan (@davidgharibyantv) wrote that several professional-looking photos of him with an IQOS were "powered by @zuckandberg," indicating that they were the agency behind the photos. Those photos were posted directly to the @iqostyle.arm account. Gharibyan then reposted them, explicitly crediting Zuck&Berg. That @iqostyle.arm posted them first and gave no credit despite their being taken by a professional team suggests they have an agreement or collaboration with Zuck&Berg. Finally, there is some evidence linking PMI and @iqostyle.arm directly, without going through Zuck&Berg or any other ad agency. Davit Grigoryan, a marketing executive at PMI, posed for a photo that was used on the @iqostyle.arm Instagram page. Also, Lilith Matevosyan, the head of marketing for Philip Morris Armenia, has tagged @iqostyle.arm in her Instagram stories showing IQOS events. However, in an article from May 2019, Chris Kirkham of Reuters reported that he had contacted the @iqostyle.arm account, which had told him it was not being paid by PMI. With the evidence pointing to a link between the two, it is unclear whether or not to take the page admin at his word.

Are models being hired by PMI, Instagram accounts, or agencies?



<https://www.instagram.com/p/BynJu74HvqT/>

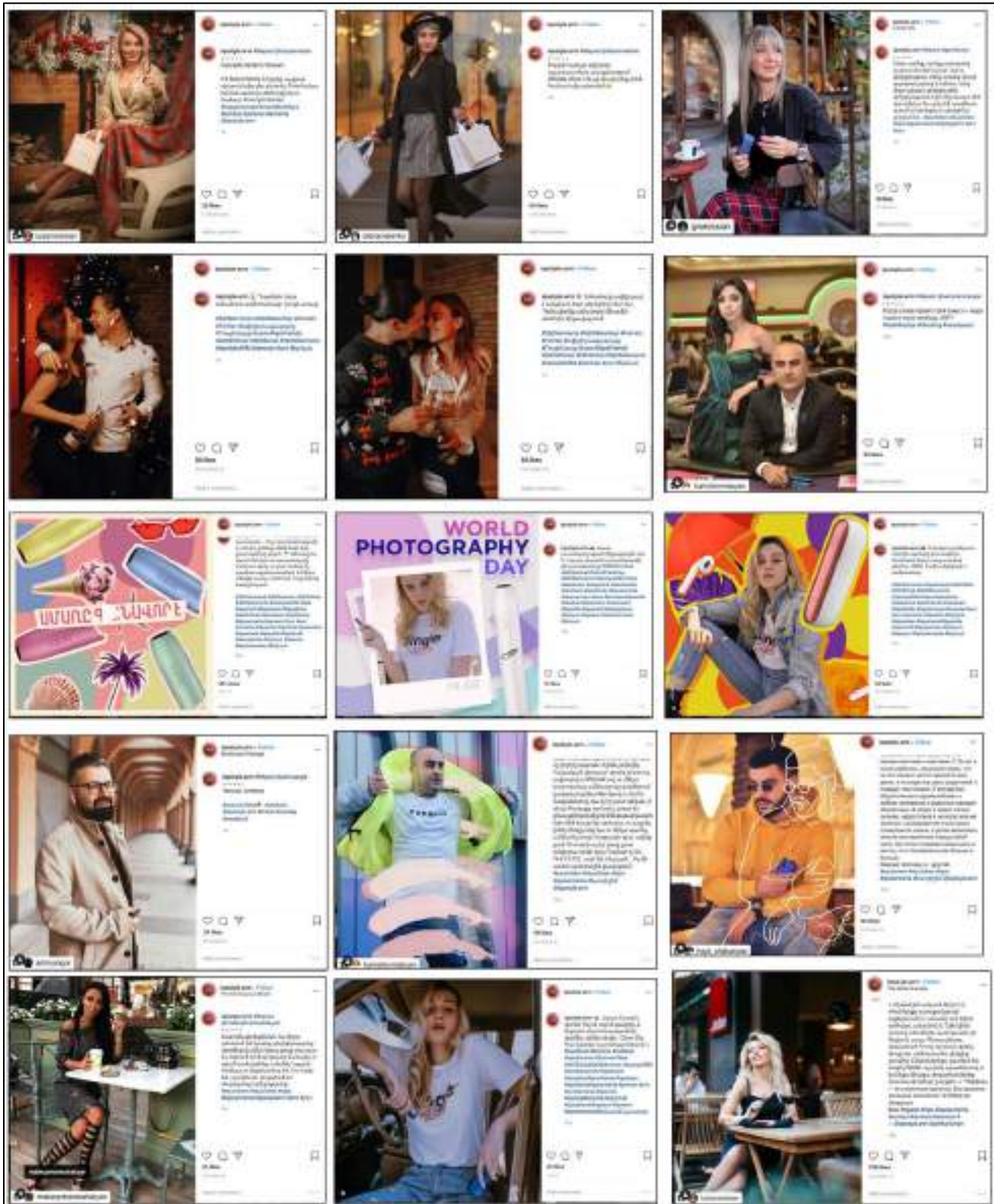
<https://www.instagram.com/p/BzpaimsBls8/>

<https://www.instagram.com/p/Bz3XEhlgSQj/>

If it is true that @iqostyle.arm is affiliated with PMI, the account breaks many of the rules and principles the company supposedly espouses. On July 25 and 31, 2019, @iqostyle.arm posted posed photos of 21-year-old Ukrainian model Nika Shuvalova with IQOS. Shuvalova, who is under the influencer age limit of 25, competed in Miss Ukraine 2018. @iqostyle.arm also posts images of people like @davidgharibyan and @vardan_sargsyan, who post the same images on their accounts with 66,300 and 39,000 followers respectively, making them useful to IQOS if the company is trying to use influencers. The page has also featured photos of Kamo Tovmasyan (@kamotovmasyan), an influencer with 190,000 followers who has previously posted definitively IQOS-sponsored content on his blog. This activity indicates that, if @iqostyle.arm is PMI-affiliated, the company has not truly suspended its influencer campaign. The page may also use non-smoker models, which goes against the message of only appealing to current smokers: one model and TV host, @_naira_grig_, told an upset friend in the comments of a photo that she wasn't actually a smoker, although she posed as one in an @iqostyle.arm advertisement. Finally, a large amount of the content on the @iqostyle.arm page is youth-oriented. Along with young models, the account uses a huge amount of beach- and pool-themed imagery, along with trendy and fun themes like retro style and ice cream.

While none of this information conclusively ties @iqostyle.arm back to Philip Morris, the use of agencies to contract models is in line with its third-party approach to advertising, in which the company hires other companies to, for example, host and promote events. If PMI is connected to the payment of these models, then the company is being dishonest about the suspension of its paid influencer campaign and continuing to target a youthful audience—@iqostyle.arm isn't even age-gated.

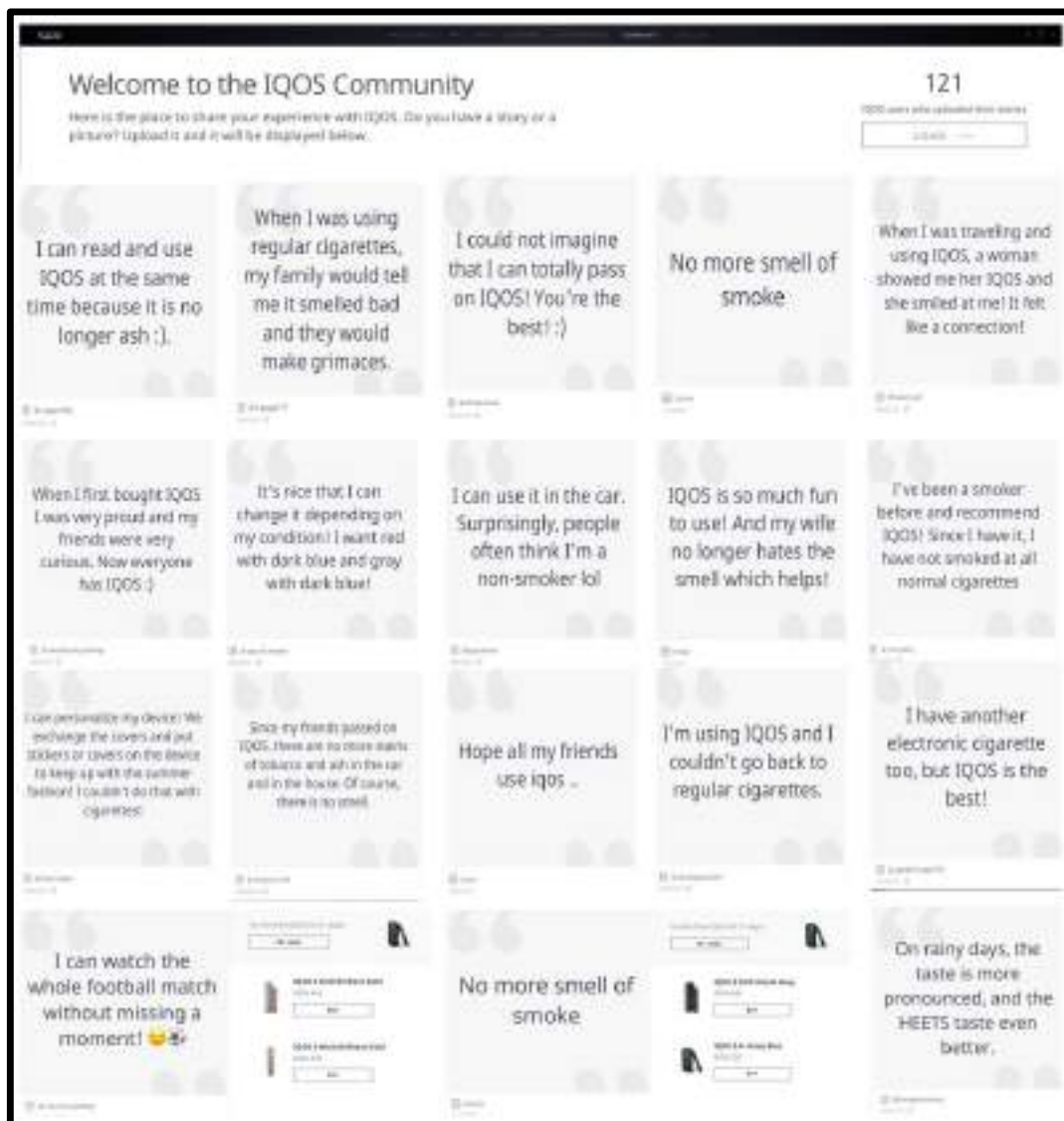
IQOS Style Armenia: Appear professionally composed and are likely of brand origin.



Other community accounts

Aside from the aforementioned accounts, there is a plethora of community-run IQOS pages all around the world. These accounts feature content ranging from reposts of more popular IQOS content to product images to community members posing with their devices to images and videos of IQOS events. Among these accounts are franchised smoke shops, like @iqos_store_24, and individual IQOS stores, like @iqos.barnaul, that share store events as well as deals on IQOS devices and HeatSticks. As in the case of JUUL, it appears as though IQOS started a trend through its social media use and influencer promotion, which has now taken on a life of its own and spawned a huge web of IQOS-focused pages and accounts that are poorly age gated and often youth targeted.

Translated IQOS supposedly “Community page” on the IQOS Romania website. The page contains a number of testimonials praising IQOS with the content more closely aligned with themes from the IQOS marketing manual. When you click on each of the testimonials, a pop up screen opens up with the testimonial alongside a click through button to “Try the free IQOS for 21 days!” and IQOS purchase links.



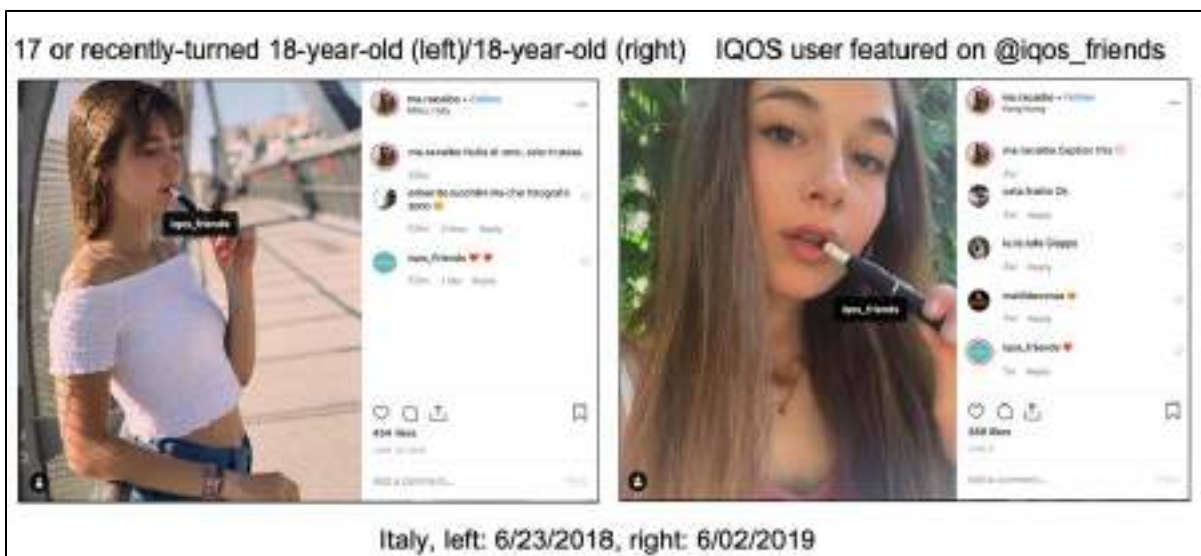
<https://www.iqos.ro/comunitate-iqos>

Youthful IQOS Posters on Instagram

There is some social media activity among underage IQOS users, mostly on Instagram, however, there is nowhere near as much as among JUUL users. Most of the underage IQOS users who post on Instagram are located in Europe, especially in Italy, and they share images of their luxurious lifestyles, from frequent travels to high end clubs and parties, all accompanied by IQOS. This trend aligns with the high price of IQOS; we have not seen much evidence of working class youth being depicted in IQOS promotional material. Additionally, there has not been much meme activity related to IQOS. The community postings surrounding IQOS are very different from JUUL in that there are few memes, jokes, or vape trick-related content typical among young JUUL users. Although underage use appears to be limited, the fashionable, luxurious, and mature look to IQOS are selling points to at least one subset of teens. The visibility that some young IQOS users have gotten on Instagram accounts like @iqos_friends is also dangerous for spreading underage smoking.

Although many of the advertisements on the official Instagram accounts are unassuming, a subset breaks into the youthful territory. The Ukrainian account has several youthful-themed ads, as does the Russian account. Several advertisements from the official IQOS Ukraine Instagram account are patently youth-oriented, appearing to target teen girls. A post from July 2, 2019, shows a hand holding an ice cream cone and an IQOS, while one from February 13 shows an IQOS and paper hearts emerging from an envelope. The first image in an image set from April 1, 2019, shows a young model posed with an IQOS on a pink background next to larger-than-life IQOS devices in pink and yellow. Text at the top of the three photos reads “time to choose a cap!” to highlight how customizable IQOS devices are. An earlier ad from November 21, 2018, has another pink background with the English text “It’s time to party!” and a hand holding a martini glass full of spiraling glitter emerges from the bottom of the frame. A similar ad from December 12, 2018, shows an IQOS and glitter-colored ornaments. These advertisements, especially taken as a whole, are reminiscent of Russian Kiss cigarette campaigns, which showed young models with ice cream, lollipops, and hearts on bright pink backgrounds.

Youthful Posters to IQOS_friends.





Matamoros worked (briefly) as an influencer. In that time, she made this post for IQOS before their influencer ban, garnering almost 45,000 likes. It appears that she has deleted this post, but it survives on as the page @iqos_friends reposted the image just a few days later on 3/20/2019.

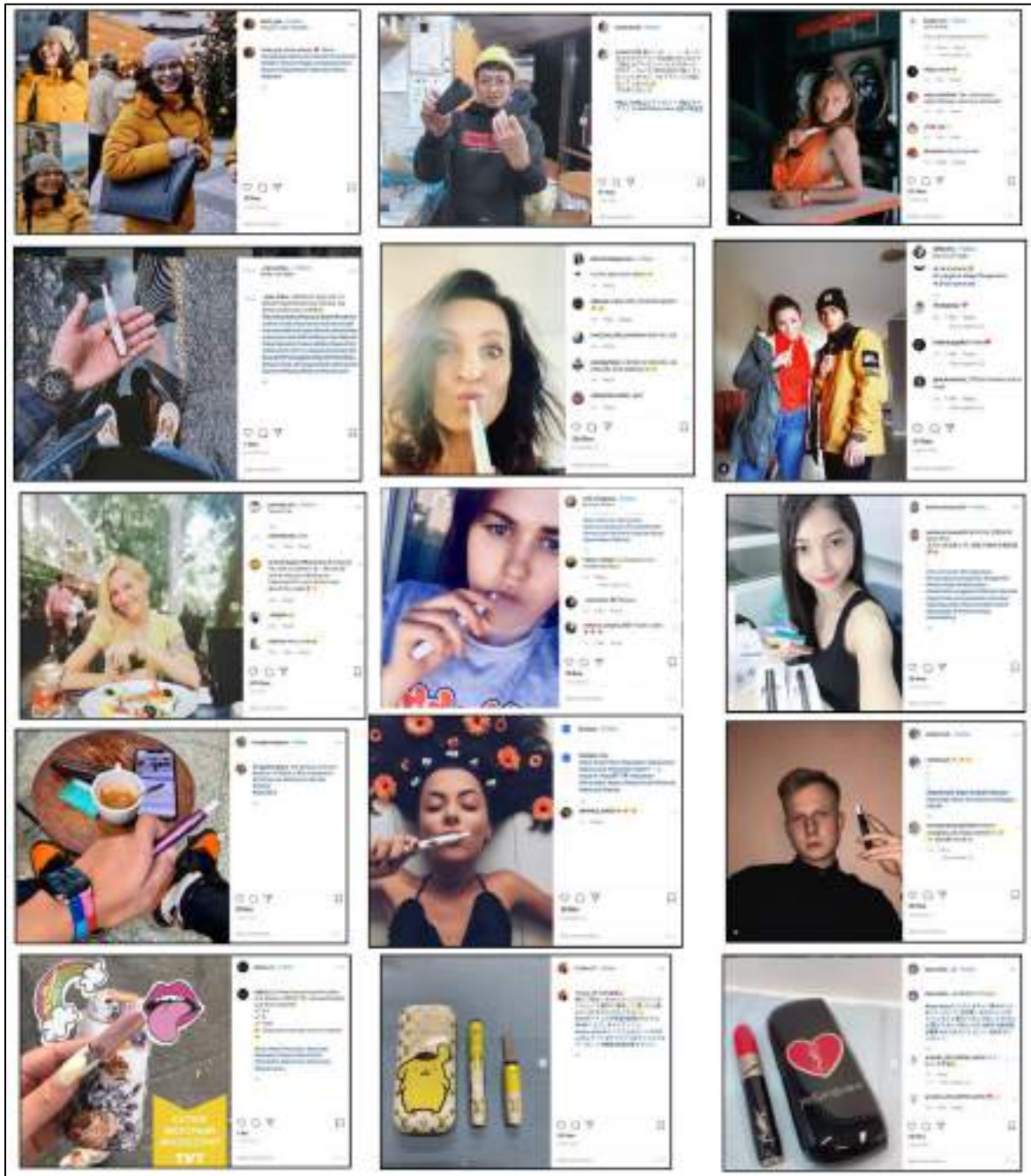


<https://www.instagram.com/p/BvOqVw5BKSR>

Instagram Hashtags

Both PMI and community IQOS accounts regularly use #iqos to draw attention to their content and cultivate a collection of posts sharing a piece of the lives of IQOS users around the world. These hashtags have allowed IQOS to garner the support of a large following of unpaid IQOS enthusiasts who regularly use the hashtags when sharing IQOS-related material. This type of promotion has enormous distribution and is exceptionally low cost. While the majority of posts on @#iqos depict IQOS or IQOS accessories posts from vape stores and vaping device competitors (e.g. RELX, JUUL, Glo, Blu) abound. The IQOS hashtags are viewable globally.

Examples of #IQOS Community Posts (samples from late December 2019 from a US Instagram account).



The tables of hashtag tallies below show some of the most popular hashtags used by IQOS and the IQOS community to create organic means of advertising. The most popular hashtags are the ones which reference official IQOS slogans, often used by official accounts, thus encouraging others of the IQOS community to share their “IQOS moments” as well. #iqos, #heets, #iqos3, #thischangeseverything, and #iqosfriends.

Most Popular IQOS Hashtags

Hashtags	# of posts 7/24/19	# of posts 9/9/19	# of posts 9/24/19	# of posts 1/1/20
#iqos	394,730	408,195	412,670	435,238
#heets	62,812	66,796	68,042	75,886
#iqos3	38,718	44,046	45,509	55,468
#thischangeseverything	30,175	32,448	32,662	33,979
#iqosfriends	23,413	26,199	27,069	32,883
#iqosstore	13,317	15,110	15,654	19,805
#iqoslovers	11,928	14,019	14,609	18,861
#iqoscase	12,575	14,260	14,742	17,153
#iqosclub	7,898	9,386	9,892	12,419
#iqosphere	5,955	7,316	7,749	9,680
#iqosmulti	9,325	11,071	7,087	9,571
#iqosstyle	3,541	4,815	5,187	6,829
#iqosstories	3,741	3,972	4,038	4,127
#iqosambassador	1,044	1,171	1,210	1,453
#iqosmoment	937	968	997	1,021
#iqosアンバサダー (ambassador)	990	968	965	947
#iqosparty	781	786	788	912
#estolocambiatodo	723	757	770	801
#iqoscoach	420	454	457	494
#iqosisnotriskfree	397	394	390	350

Country Specific IQOS Hashtags

Hashtags	# of posts 7/24/19	# of posts 9/9/19	# of posts 9/24/19	# of posts 1/1/20
#iqosistanbul	15,338	16,223	16,556	18,591
#iqostürkiye	13,806	14,383	14,705	15,739
#iqositalia	12,052	12,895	13,582	16,648
#iqosizmir	8,459	8,909	9,066	9,457
#iqosrussia	6,692	7,299	7,448	9,601
#iqosjapan	6,468	6,630	6,640	6,899
#iqosukraine	5,413	5,895	5,895	7,275
#iqoshongkong	4,366	4,423	4,437	4,476
#iqosua	3,897	3,225	4,501	5,095
#iqosdubai	3,196	3,578	3,776	4,035
#iqoskuwait	2,741	2,899	2,968	3,406
#iqoskorea	2,591	2,626	2,630	2,603
#iqosiran	1,943	2,127	2,223	3,196
#iqosjakarta	1,863	1,886	1,889	2,135
#iqosphilippines	1,724	1,797	1,797	1,815
#iqosuae	1,617	3,225	3,684	5,209
#iqosgreece	1,369	2,701	3,020	4,470
#iqospoland	1,153	1,071	978	369
#iqoscolombia	1,100	1,135	1,125	1,126
#iqospolska	957	892	892	299
#iqosindonesia	911	903	815	1,364
#iqosusa	814	2,157	2,485	3,877
#iqosgermany	769	2,019	2,334	3,690
#iqoskiev	641	730	794	1,575
#iqosmalaysia	640	641	646	732
#iqosserbia	613	625	625	669
#iqosbulgaria	495	441	441	456
#iqosarmenia	439	507	512	713
#iqosromania	332	353	353	378
#iqosrbija	259	261	261	319
#iqosodessa	145	198	234	726
#iqosguatemala	144	172	183	250
#iqosisrael	69	74	73	69

Measuring engagement with #iqos via Keyhole tracker

Keyhole® (<https://keyhole.co/>) is a hashtag analytics company. Using Keyhole, #iqos was tracked and analyzed for a 1 month period in the fall of 2019 (September 9 to October 9). During this period there were 14,674 posts of #iqos posted by 7593 users. Impressions, the number of times a post was displayed to a user, were 25,241,910 or an average of 1720 views per post. Reach, which measures the number of unique users to view a post, was 13,716,888. Engagement, the number of people who liked, commented upon, or shared a post was 212,606. Clearly, merely tracking the number of posts greatly underestimates the robust impact of this form of unpaid, organic social media marketing.



TikTok

TikTok is a short-form video creation and sharing app that's highly popular among young teenagers and pre-teenagers. Users post 15-second looping videos of lip syncing, dancing, challenges, and comedy skits that sometimes amass millions of views. 66% of TikTok's 500 million monthly users are under the age of 30, and in the U.S., 60% of these active users are aged 16 to 24 (Media Kix 2019). These numbers, however, may not be an accurate representation of users' actual ages, as the app does not verify the birthdays that users volunteer when creating accounts.

Although IQOS does not seem to have an official presence nor influencer content on TikTok, individual users have created a large amount of content related to the device. The hashtag #iqos has 7.1 million views as of September 2019, and other IQOS hashtags have hundreds of thousands more. Granted, the automatic looping of the videos may boost view counts and inflate these numbers more easily. Most of the IQOS-related hashtags are in Japanese and English, with a few others in Russian. The videos most commonly feature people showing off or decorating IQOS cases; users dancing, lip syncing, or posing with their devices; and people using IQOS with the background of music or special effects. Some videos are comedic, though this proportion is much smaller than for JUUL content on TikTok and social media more widely.

What seems to be a relatively small subset of the IQOS-related videos on TikTok is clearly created by youth or youthful in nature. Several of the more popular IQOS videos with thousands of views are created by teenagers 18 and younger. One 16 year old is seen completing a dance challenge popular among youth with an IQOS in his hand. When we reached out to this user, he claimed that TikTok had removed every video in which he had his IQOS or any cigarette due to its strict community guidelines. On the contrary, the user still had several videos featuring IQOS, and the number of IQOS videos on TikTok suggests that TikTok isn't doing enough if its intention is, in fact, to remove all tobacco-promoting

content. While TikTok does reserve the right to remove content, the only guideline in their community guidelines that might suggest this intention reads, “DO NOT use TikTok to sell or encourage the use of weapons, bombs, drugs, or any other regulated goods prohibited by local laws” (TikTok). Given the young user base TikTok, any content with IQOS inadvertently gets youth exposure.

A Large number of micro-influencers now active on the platform, especially the always-on Gen Z users.

IQOS on TikTok.

Most popular hashtags

Hashtag	Views	Translation
#iqos	5.2m	
#iqos3	2.1m	
#iqosカスタム	349.0k	IQOS Custom
#バカリビiqos	266.5k	Peripi IQOS
iqos修理	194.4k	IQOS Repair
#iqos3multi	99.1k	

Types of IQOS videos:

- Showing off IQOS case
- Device/accessory decorating
- Smoking
- Difficulty of use
- Taking apart and/or cleaning
- Magic tricks

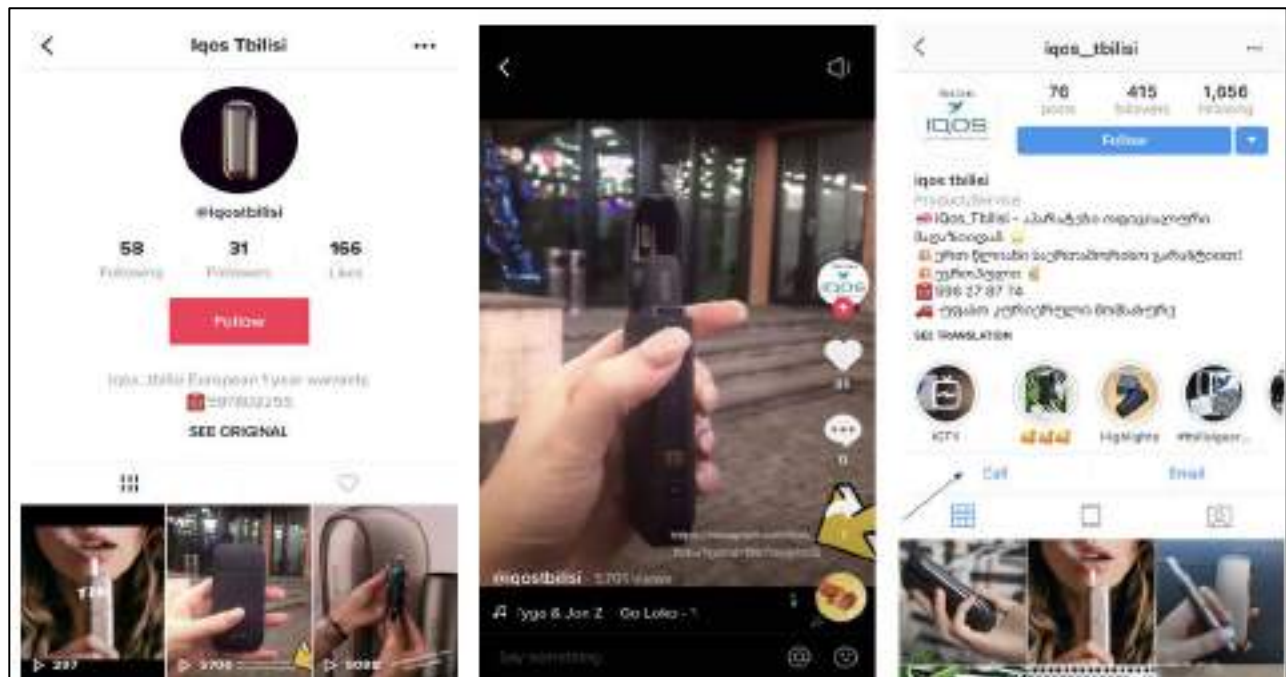
Summary

- Most people who post with IQOS post only one IQOS-related video
- Several videos posted by 18 year olds
- At least one IQOS store (unofficial) on TikTok
- No obviously official accounts
- Link to small Instagram accounts

Young IQOS users on TikTok.



IQOS Store in Tbilisi, Georgia, on TikTok.



IQOS Store in Tbilisi, Georgia, on TikTok.

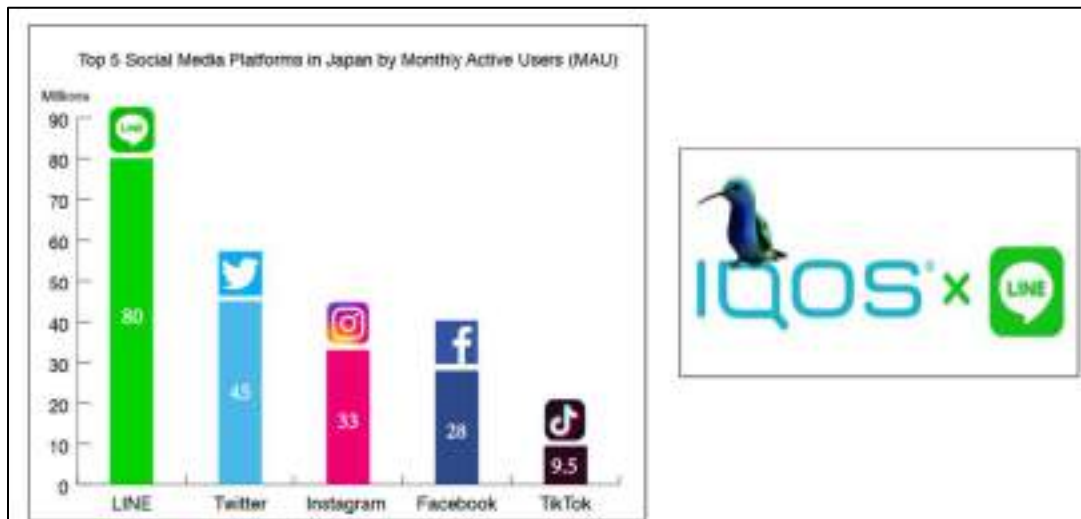
- One person creates original sound and others can download it to lip sync
- 135 people have made videos lip syncing to IQOS-related sound

Native Japanese speaker's explanation/translation:
The man (voice) claims he did something huge (an accomplishment): he drank afternoon tea in the morning, and it was a huge deal! The reason he was able to do that was that he was in the best mood after vaping so much IQOS. This is an exaggeration of a small thing, meant to be funny.

<http://vm.tiktok.com/8q3D5A/>

Partnership with Messenger App LINE in Japan

LINE, a freeware app providing cross platform instant messaging, is the largest social media network in Japan with major presence in Thailand, Taiwan, and Indonesia. (ref Iqbal). It provides instant communications across smart phones and computers offering free voice and video calls. Advertising is its primary revenue source. Japanese teens use LINE more than any other age group, although the platform transcends all ages. (ref Kawaguchi)



<https://blog.btrax.com/japan-social-media-usage-statistics/> (August 27, 2019)

IQOS is promoted in Japan via an Official LINE Account. This lets companies create their own accounts to mass-message users that choose to follow them. (ref. Kerr) These accounts can also post to the LINE Timeline, create PR pages with coupons, and more. Additionally, as stickers are a favorite feature for LINE users, LINE allows its advertising partners to create "*Sponsored Stickers*," ideal for brands with a mascot that can be turned into a cute sticker in messages. Other advertising options include LINE Free Coins and ads in LINE NEWS, the app's news distribution service in Japan.

It possible to pair the IQOS device with LINE to monitor its function. Once a user signs up for the IQOS LINE Official Account, they are linked to IQOSSphere, PMIs Japanese IQOS club offering prizes for brand loyalty. (ref Tips for connecting IQOS to LINE). The LINE connection allows IQOS users to find shops and restaurants where they can use their device, to accumulate and monitor their points towards prizes, and to register for sweepstakes. (ref Sakamoto) In an important benefit for the company LINE participation provides valuable data on users behavior.

IQOS partnership with LINE



<https://japan.cnet.com/article/35102468/> (June 6, 2017)

Controlling IQOS via LINE App



<https://yellowcorn.jp/thought/2019/03/03/3604/>



Access to IQOS benefits through LINE.



“With IQOS official LINE account, A comfortable IQOS life.”



LINE APP links IQOS users to IQOSphere, PMI's brand loyalty rewards program.



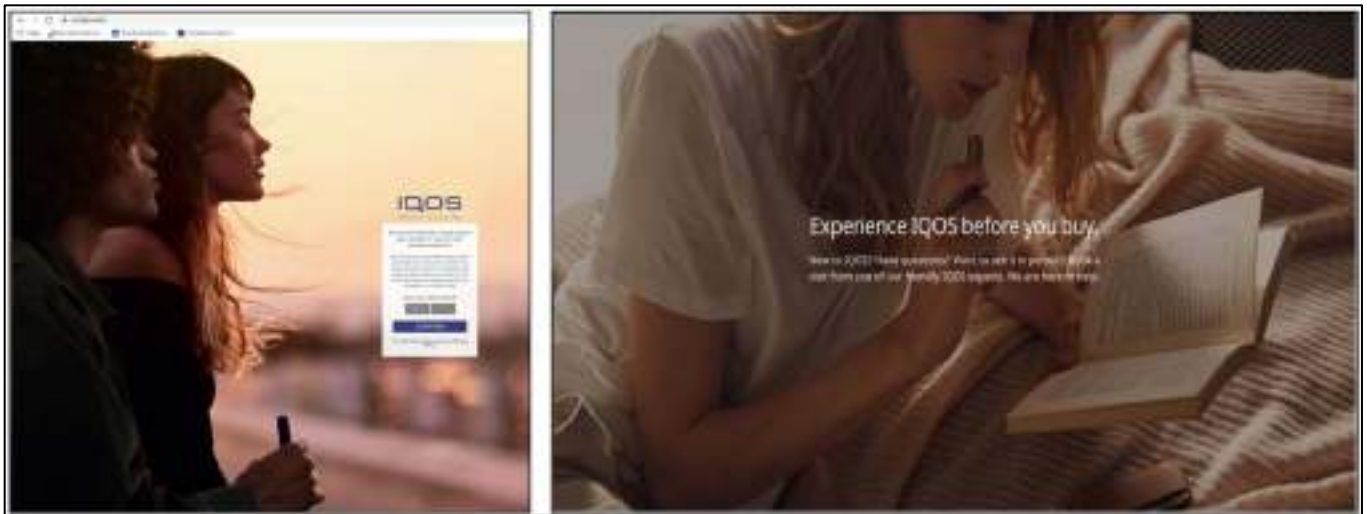
<https://japan.cnet.com/article/35102468/>

IQOS Websites:

IQOS has a number of country-specific official websites that are geo-fenced, i.e. they can be viewed only by a person within the country. This was overcome by using a VPN to access each country's website. Many IQOS websites require visitors to attest that they are of legal age to use tobacco products in the country. These age gates, including that of the new USA IQOS site (getiqos.com), are ineffective in that an underage individual can simply click through.

New Zealand IQOS website entry page.

IQOS age gates are ineffective in that an underage individual can claim any date of birth.



The various IQOS websites feature extensive sections that describe the health and social benefits of using IQOS such as being free of the strong smell of tobacco and being exposed to reduced carcinogens. The Colombia and Romania pages feature the IQOS promises campaign: a series of health claims and company practices IQOS pledges to uphold for its users. In return, users can make a promise to switch from cigarettes to IQOS or to get others to try IQOS.

On the website are details of IQOS's trial program. The program, which is offered by most countries in which IQOS is available, allows users to purchase and try the product for a period of 1 to 3 weeks after which they can choose to keep or return the product.

New Zealand website: "The benefits of IQOS. There is no shortage of reasons to love your IQOS. Free from fire, ash, and smoke. IQOS is an alternative to smoking."



SECTION 5. IQOS INFLUENCERS, BRAND AMBASSADORS, AND COACHES

In promoting its IQOS brand PMI used a variety of sales representatives to engage potential customers. Most are compensated as either paid company employees or contractors, via gifts/discounts of IQOS products, or via invitations to exclusive events. These company representatives include three somewhat overlapping categories: Influencers, brand ambassadors, and coaches.

Influencers (also known as IQOS Brand Ambassadors)

Influencers are social media users with large followings recruited by companies to promote their products. In PMI's case, many influencers who promote IQOS reveal their role by including the hashtag #iqosambassador (or the same hashtag in different languages) in their postings.

Before May 2019, PMI had a host of known IQOS influencer brand ambassador campaigns across the globe in countries including Japan, Romania, Russia, Colombia, South Africa, Armenia, the Czech Republic, the UK, Israel, and Italy. Influencers were paid for posting, given free IQOS devices, taken on luxury cruises, sponsored to stay in luxury hotels, etc.

In a study by The Campaign for Tobacco-Free Kids use of influencers has been observed for many tobacco companies, including by PMI on behalf of its Marlboro cigarette brand in Indonesia, Jordan, Moldova, the Philippines, and Russia. (Ref Myers & Muggli).

Suspension of IQOS Influencer Program:

On May 10, 2019, Chris Kirkham of Reuters exposed the use of influencers under the age of 25—a violation of PMI's internal standard for the minimum age of their models. In response, PMI claimed unawareness, launched an internal investigation and announced its suspension of all influencer activity. (ref Kirkham x 3) The Reuters report described an international series of under 25 models praising IQOS on Instagram. PMI defended itself while apologizing: *"No laws were broken" . . . "However, we set high standards for ourselves and these facts do not excuse our failure to meet those standards in this instance.* Matt Myers, President of the Campaign for Tobacco-Free Kids, characterized PMI's action as: *"changing their behavior only when caught red-handed."*

Influencers are categorized by their number of followers nano (<1000), micro (<10,000), mid (<100,000), macro (<1M), mega (>1M). (ref Socialpubli). IQOS is known to have employed large-scale influencers prior to the suspension of their online influencer campaign in May 2019. As of now, it seems that they instead appear to use micro-influencers, especially PMI employees to spread the word on social media.

Influencer Marketing Company contracted with PMI to Promote IQOS:

IQOS influencer marketing was contracted to, at least in part, an Israeli company named LEADERS whose website (<https://www.ldrsgroup.com/about-us/>) describes: *" . . . influencer marketing has allowed us to establish and nurture a network of over 1 million influencers. Our unique work methodologies and technological tools help us run effective campaigns creating a positive impact and profitable returns for all our clients."* The description of their target audience is manifestly youth-oriented: *"Your potential clients watch less TV, ignore banners and skip traditional commercials. They are not into being exposed to aggressive advertisements every few minutes either. What do they like? Constantly scrolling through their*

social media feeds looking for the next big thing. But the biggest buzz is taking place inside the pages of the superstars that grew there: influencers.”

Key Opinion Leader Marketing:

KOL Marketing (ie. key opinion leaders) was featured in IQOS influencer efforts. In an job listing in the Czech Republic, described the responsibilities to include: *“You will execute KOLS campaigns from A to Z Identify, build and maintain a network of Czech Key Opinion Leaders to act as brand advocates and constantly discovering local influencer talents that can be the right fit to the brand values ensuring its DNA and equity. At the same time you will be in charge of generating media newsworthy brand content.”*

Principal job responsibilities included: *“Make use of Digital Tools, such as Klear, Sentione or Sprinklr, in order to; Identify influential profiles and media leveraging in their analytics for more effective activations, Measure and understand the sentiment of Influencer and media campaigns, and Understand the impact of Influencer and Media Marketing Activities in the digital ecosystem.”*

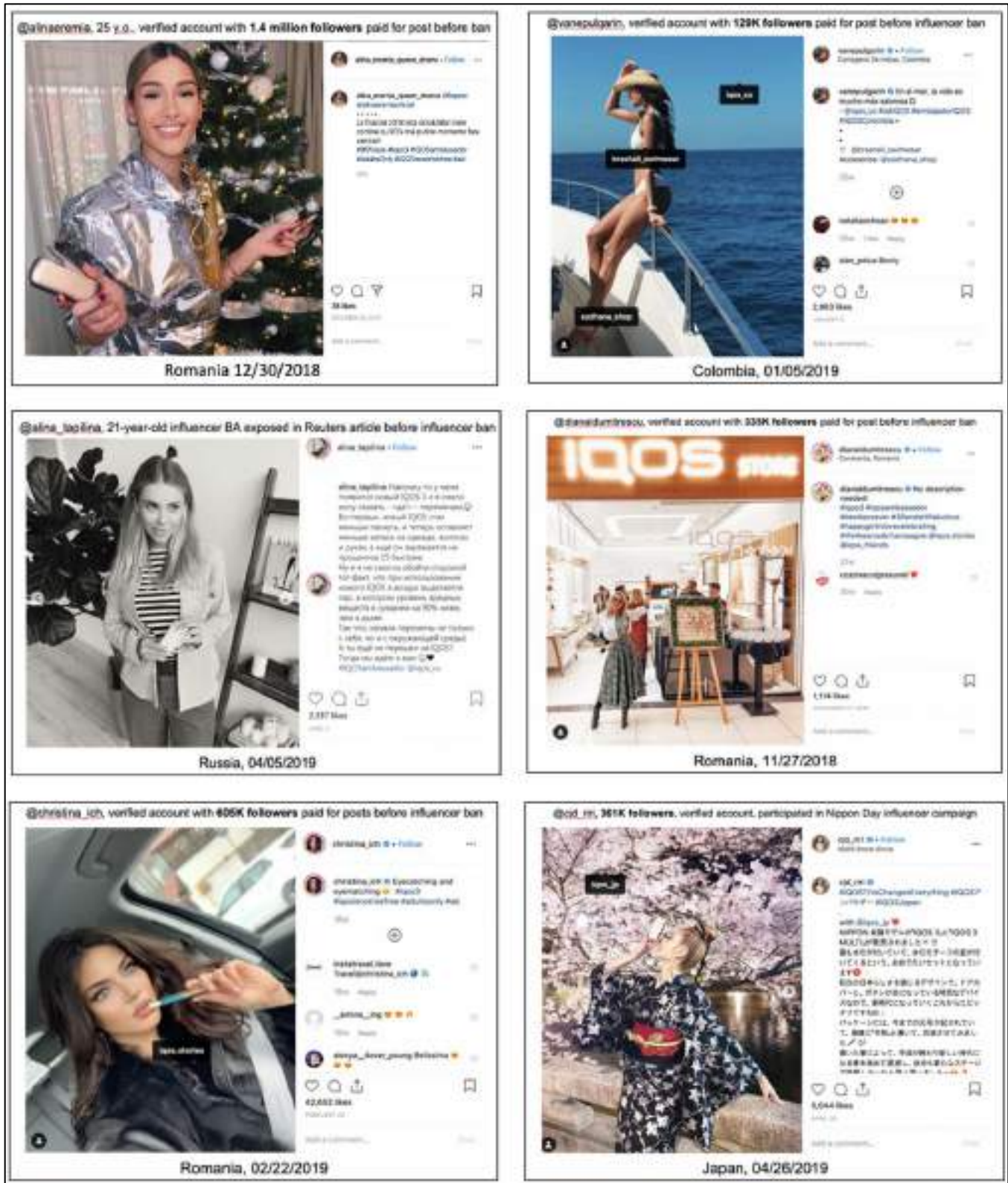
Measuring IQOS influencer engagement	Klear - influencer tracking/contacting platform Sentione - tracks mentions of product online Sprinklr - business analytics
Principal Accountabilities <i>'Make use of Digital Tools, such as Klear, Sentione or Sprinklr in order to</i> 1. Identify influential profiles and media leveraging in their analytics for more effective activations 2. Measure and understand the sentiment of Influencer and media campaigns 3. Understand the impact of Influencer and Media Marketing Activities in the Digital Ecosystem 4. Crisis Management 5. Trends and up-to date and competitors activations 6. Communication and setting up the strategy with PR agency	

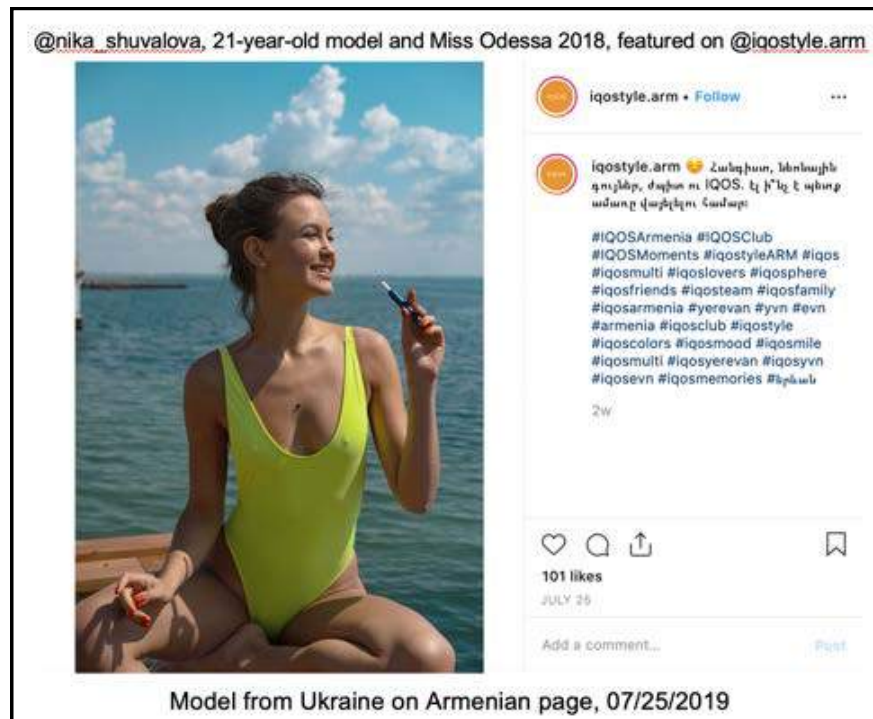
Klear: (<https://klear.com/>). *“With the smartest influencer search engine on the market, you can easily discover influencers by category and location. Advanced search filters allow you to focus by influence tier, social channel, audience demographics, niche topics and more.”*

Sentione: (<https://sentione.com/>) *“Social Listening and AI Customer Service Automation. Monitor online discussions that matter to your brand. By finding truly relevant insights with AI-based online listening and data analysis engine, you can fully manage your online brand image.”*

Sprinklr: (<https://www.sprinklr.com>) *“Increase ROI of Content Marketing with re-use across channels, markets and business units”*

Examples of IQOS influencers prior to PMI announcing an end to influencer use in May 2019.





While most influencer activity has stopped with the influencer ban, there are indications that not all of it has ended. The largest extent of influencer-like content is through the Malaysian DISQOVR program, where musicians, celebrities, and motorsports athletes have posted images of their IQOS devices and photos of themselves at IQOS events. For additional information, see the DISQOVR section. Models on @iqostyle.arm may qualify as influencers if the page is official and have continued to post after the ban. Romanian brand ambassadors may also qualify.

Example of Romanian Brand ambassadors as micro-influencers (<10,000 followers) after the ban:



https://www.instagram.com/andra_boldea/

How we figured out she was a non-smoker: the model in the pink sweater posted this exact photo on her personal and in the comment section of this post, one of her friends commented: “Narr really?”, then the model replied: “Ինչը՞ Տաբ:Չէ, ես չեմ ծխում” which translates to “What Tat: No I don’t smoke.”



https://www.instagram.com/p/BymjI3IB_PH/

Irfan Iskandar is a musician with the band Toko Kilat, which had a tour around Malaysia through the IQOS DISQOVR program. Here, Iskandar holds up an IQOS branded with the name of the tour (Pemacu Api). This post was shared on his Instagram, which has 11,300 followers.



<https://www.instagram.com/p/B1NfPkqnVvk/>

Noh Salleh is a musician, apparently with the band Toko Kilat, and owner of popular fashion brand Hikari Riders who has been highly associated with DISQOVR through Hikari Riders. Salleh has been heavily involved in DISQOVR events. In August, Salleh posted to his Instagram page and story with prominently DISQOVR-branded material. In the post on the left, he also tagged the account @gengiqosmalaysia_, an unofficial, fan-run IQOS account that still gets a lot of attention from IQOS users in Malaysia. Noh Salleh has 369,000 followers on this account (@mohammadnohbinsalleh), making him a major influencer. It is unclear if he is being directly paid for these posts, but he is likely being compensated for his overall role in DISQOVR.

Noh Salleh's Instagram story and post promotion the DISQOVR tour.



<https://www.instagram.com/p/B0JrheDplGp/>

<https://www.instagram.com/p/B1nnvOWJRAv/>

IQOS Coaches

IQOS coaches, also known as IQOS consultants, advisors, partners, sales representatives, and sales experts, among other names, are paid PMI employees who work as sales representatives to reach out to potential customers to educate them about IQOS, perform trials, and sell devices, among other duties. Though coaches are employed to do in-person outreach work, a small number of coaches post about IQOS on Instagram, especially in Romania but also in several other countries. In Romania, many of these coaches are also Romanian brand ambassadors (see below). We have posted videos from coaches giving their IQOS testimonials and also engaging in coach recruitment on our SRITA website: tobacco.stanford.edu/videos/iqos.

Coaches' photos on Instagram include coach team pictures, photos from IQOS events, and lifestyle photos. There are also Instagram pages dedicated to coach teams and coach hiring.

The IQOS Coach position is an open-ended sales representative job with additional functions that vary by country. PMI numbers stated there were 4500 coaches in 20 countries in 2018 (ref IQOS CZ, 2018), a number that grew to 8500 coaches in 42 countries in 2019 (ref Philip Morris International 2019). Central to their role is selling IQOS, though their specific sales activities take different forms depending on the country and exact position. Given their number and mixed management, one finds highly variable practice. In countries with loose regulation, coaches may hang out in public areas and at youthful events, hold frequent parties at luxurious locations (often on the beachfront), and engage very closely with loyal

customers in a manner which is aggressively friendly. To the contrary, in countries with stronger regulations, some coaches report that they can't even reach out to people without first being asked about the product. But even then, there are reports of law-breaking.

Oftentimes, coaches try to make sales during the day and then go and host events at night. Many take place in bars and discos. In addition, coaches staff branded IQOS parties such as the IQOS Zone x Cosmopolitan Party in 2017 (where they could be seen in trendy, beach-themed outfits).

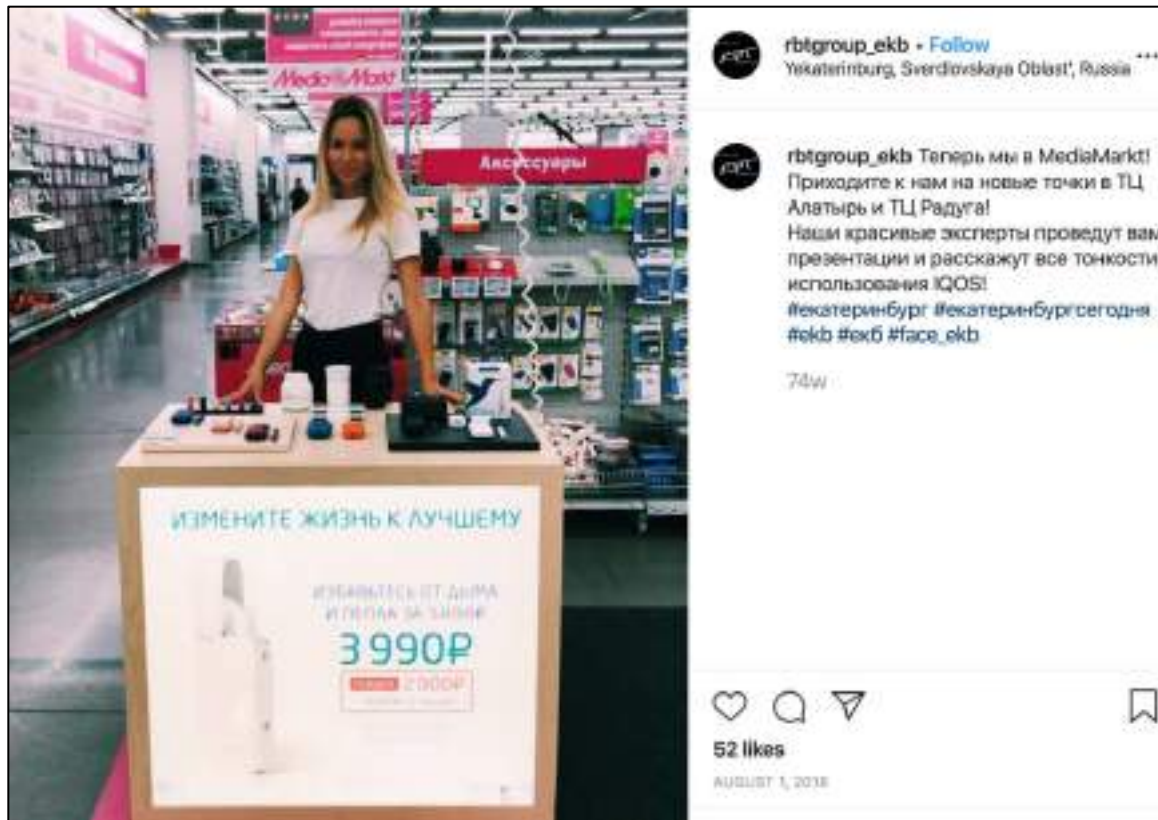
Hosted events are especially common where IQOS Coaches are hired through third-party marketing agencies, as is often the case. These outsourced coaches are ambitious, sometimes engaging in coordinated public advertising. For instance, the IQOS Coach Team #belikeme ordered IQOS-themed letterman jackets. A series of Instagram photos show them sporting this college apparel out in public places. Another example would be how BTL Carlo, a recruitment agency for IQOS Coaches, hires college-age students to drive around in expensive IQOS-branded cars.

Russian IQOS Coaches.



<https://www.instagram.com/p/Bo0mKtrnXJa/>

Text Translation: Night, Friday, IQOS boutique - the perfect combination.



<https://www.instagram.com/p/BI9xJuQnwYC/>



https://www.instagram.com/p/BjtoJ_aHZu9/

Text Translation: "Are you graduating from university? And you still don't know where you want to go? Over the years of the institute, I realized that this is not yours? Do you want to save on travel, buy yourself good clothes and smartphones? Work in a friendly team of ambitious, result-oriented guys? Then you come to us!"

IQOS Coaches.



Recruitment posting for “IQOS Partners” in the Czech Republic. “It is not a typical dealer position. The goal is to set an example and convince of the benefits of raising the interest of adult smokers in the neighborhood to use IQOS instead of classic cigarettes. The task is also to build your own network of contacts . . .”



Some coaches work in well-coordinated teams headed by IQOS Coach Leaders. There is a great deal of top-down organization, with some teams getting training at their country’s PMI headquarters or staffing high-profile brand locations (Papa Carlo, 2017; Fieldstar, 2018; RBT Group, 2019).

Some Coaches work flexible hours and are paid a baseline amount for reaching their monthly quota. After reaching the quota, they are paid extra per sale. To convince potential customers, they’re authorized to lend IQOS devices to clients for a trial period and run initial hour-long consultations to show users how the device works. Other methods to sell people on the product are quite common. These include public advertising through decals on luxury vehicles and attending high-profile events in designer outfits in order to sell IQOS to attendees.

Other names for coaches include IQOS Partner, Advisor, Sales Expert, and Sales Representative, although the catch-all term is “coach.” Some coaches are non-smokers—one coach said she just cared about spreading the word about the benefits of IQOS. (IQOS CZ, 2018)

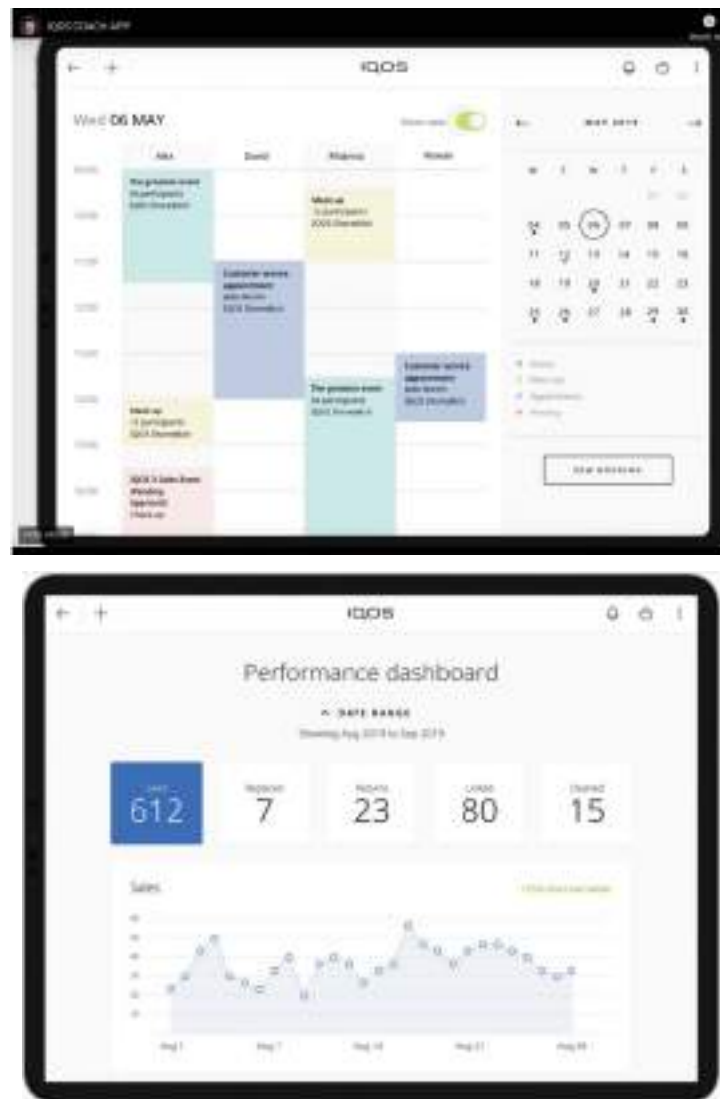
PMI contracted with the service design studio of Publicis Sapient to develop an app for their sales force. (<https://the-dots.com/projects/iqos-331277>)



The IQOS Coaches APP, the IQOS consumer App, and the IQOS website are three access points of the comprehensive set of “Digital Touchpoints” used by PMI to track customers for marketing purposes.




IQOS Coach App. <http://www.rowanwallace.net/iqos-coach-app>



Job Listing for IQOS Coach Leader in Italy on Glassdoor (1/1/2020)

"As IQOS Coach Leader you will have the task of identifying and informing exclusively adult smokers who would otherwise continue to smoke on products with reduced risk ("RRP"), managing to find opportunities to involve and make known to the Legal Age Smokers (LAS) RRP products. For Philip Morris International, RRP products are products that present, may present or have the potential to present a lower risk of harm to smokers who use them, compared to the persistence of the habit of smoking. The marketing of RRP products requires the identification of the right consumer (exclusively adult smokers) in the right contact points and at the right time, in order to involve them effectively and responsibly, thus achieving the agreed commercial objectives."



IQOS Coach Leader - Central Italy

Philip Morris International - Roma

[Apply Now](#)
[Save](#)

LINE 0477 10439813

Are you passionate about the world of Philip Morris International (PMI), its cultural change which is the engine of success for the transformation and the challenges we face every day to build smoke-free futures?

Are you looking for an opportunity that will make you grow in your job?

Are you a person with a strong consumer orientation and do you work well in a team? Do you have an entrepreneurial spirit?

If yes and if you are looking for a challenge and want to work in a dynamic and international environment, send your application for this role at:

IQOS Coach Leader - Central Italy

PMI has always been one of the leading companies in the tobacco sector, but the recent and fundamental change that we are currently experiencing is unique and unprecedented. We are facing one of the biggest transformations in the history of fast-moving consumer goods and creating a vision of a smoke-free future requires enormous courage, resourcefulness and innovation.

The opportunity:

As IQOS Coach Leader you will have the task of identifying and informing exclusively adult smokers who would otherwise continue to smoke on products with reduced risk ("RRP"), managing to find opportunities to involve and make known to the Legal Age Smokers (LAS) RRP products. For Philip Morris International, RRP products are products that present, may present or have the potential to present a lower risk of harm to smokers who use them, compared to the persistence of the habit of smoking. The marketing of RRP products requires the identification of the right consumer (exclusively adult smokers) in the right contact points and at the right time in order to involve them effectively and responsibly, thus achieving the agreed commercial objectives.

The Coach Leader reports directly to the Area supervisor and is responsible for coordinating a team of Coaches that can be composed of a variable number ranging from 7 to 12. He carries out his activity independently and guarantees the achievement of both individual and team following and applying corporate guidelines. He carries out his activities in direct collaboration with all the other commercial structures in particular RSM, Engagement and Incentive retail.

ACTIVITIES:

- Support RRP activities, informing adult smokers only about reduced risk products ("RRP")
- Identify the opportunities in the area autonomously, involving and researching exclusively adult smokers who would otherwise continue to smoke and who may be interested in receiving information and trying, without a obligation, the IQOS device, using an approach - strongly oriented towards the consumer.
- Support the Area SPV for the creation and coordination of a team of local Coaches
- Support the activities of all departments, spread the knowledge of the product and its use exclusively among adult smokers and search for adult consumer communities in order to maintain and increase the related network, contributing to the corporate vision of eliminating cigarettes
- Proactively support and propose innovative ideas in order to meet the needs of adult smokers and by seeking solutions to solve simple problems, contributing to the corporate vision.
- Collaborate with other commercial functions in order to ensure consumers with an adequate level of service in terms of distribution and availability of products in the area and information
- Carefully monitor the budget and commercial activities

IQOS Coach Leaders

The role of an IQOS coach leader seems similar to that of an IQOS Coach, along with some additional managerial responsibilities. IQOS coach leaders manage teams of IQOS coaches in addition to performing the sales tasks of regular IQOS coaches and other duties such as organization of events, sponsorships, and marketing activities. The position does not require excessive qualifications.

For example, a recruitment post (<https://drive.google.com/file/d/1IS09Zn6BRDvqZKc4tH4-6QYLDyzfbQGy/view>) for an IQOS Coach Leader in Treviso, Italy only requires that you have “*At least one year in a commercial organization.*” On LinkedIn, there were many Coach Leaders from Italy. On Instagram, we found one from Russia and one from Romania. In Russia, for instance, one prominent Coach Leader is also a jewelry designer and model. From their Instagram page (https://www.instagram.com/rbtgroup_ekb/) most coach leaders in Russia appear to be attractive young women. They frequently appear posing on the team’s official Instagram account. While we don’t necessarily think that social media is a big focus for them, fashion and beauty clearly are. It would seem that the purpose of their having hired a model to run their team is to keep them all stylish (especially for when they host events).



<https://www.instagram.com/p/Bt6S1xzAAvV/>


RBT group (<http://rbtgroup.ru/>) is an integrated marketing communications agency whose structure includes both permanent and mobile offices throughout the Russian Federation.

Text Translation: “*Being a leader is a science. Two days supervisors and managers studied this craft. The coach wished everyone sooner or later to hear from their employees: You are the best leader I have had.*”

The Romanian Coach Leader we found seemed to be quite savvy as well (a blogger with almost 11K IG followers). She has made some youth-appealing Instagram posts, although she’s definitely less of an ambassador than some of the Romanian Coaches we’ve seen (Chiritescu 2017, 2018). Given what we normally see in Romania, this isn’t especially damning. But a fair suggestion would be that the Coach Leader’s social media specialty influences the brand-oriented postings made by her team.

Job Listing for IQOS Coach in Canada on Glassdoor (1/1/2020)

Note the differences between the job description in Italy versus Canada. Both use the term “*reduced risk products*” describe recruiting smokers to change to IQOS. In Italy it describes IQOS as having a “*lower risk of harm to smokers.*” In Canada, the more generic: “*you are genuinely interested in the needs of others.*”



Sales Representative (IQOS Coach) Apply Now Save

Philip Morris International - Victoria

Finish your profile to find jobs most relevant to you. [Finish Your Profile](#)

[Job](#) [Company](#) [Rating](#) [Salary](#) [Why Work For Us](#) [Benefits](#)

WHAT ARE WE DOING?
We are currently disrupting our industry and going through a transformation. We are looking to a new vision, one which will help all smokers lead a smoke-free future, by 2035. In doing so, we have created an RRP solution, IQOS. IQOS is different from a regular tobacco product, as it uses a technology whereby it heats tobacco rather than burning it.

We are really excited about our product, as you will be too! We are looking for a candidate who shares a passion for our vision and is looking to build a career with an international company.

THE ROLE-FULL-TIME - CONTRACTED
The focus of the role is working with and through your various networks while building and maintaining positive relationships and working within guidelines. The focus of the role is to enhance the awareness of IQOS and support Legal Age Consumers in their conversion from combustible tobacco to heat-not-burn products within a defined network and/or community.

YOU are friendly and genuinely interested in the needs of others, including the company and consumers. YOU are persuasive and love to educate the consumer about the benefits of products. YOU are very customer-centric and understand the need to provide exceptional customer service, throughout the sales cycle.

ESSENTIAL FUNCTION

- Establish and develop consumer centric relationships with Legal Age Consumer to introduce new and innovative reduced risk product category (IQOS) to the marketplace.
- Educate and inform the Legal Age Consumer of the product characteristics of reduced-risk products (IQOS) as an alternative to combustible cigarettes.
- Support the consumer journey of Legal Age Consumer as they make their transition to being smoke free. Ensure the consumer is aware of the various options and channels to be supported (Customer Call Centre, IQOS Store, IQOS Coaches, etc.). Provide superior customer service.
- Acquire and generate new leads to ensure sustainable commercialization of IQOS

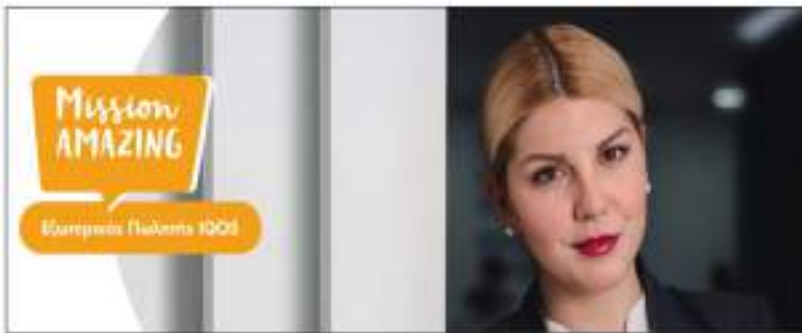
SKILLS REQUIRED:-

- Being passionate and self-motivated to drive for results
- Being outgoing, sociable and enjoying building new networks
- Listening to the customer actively
- communicating clearly with a consumer service mindset
- Being able to set priorities with good planning skills
- Bilingual; English/Mandarin, Cantonese or Korean is a strong asset

PMI job listings for IQOS coaches and brand ambassadors

PMI recruits for a variety of positions that, while bearing different names, all revolve around retail, communication with customers and potential IQOS users, and networking with prospects. We collected 53 job postings for IQOS-related sales jobs posted between May and July 2019. Nearly half (26) were located in Spain, with the rest in other European countries plus two in Guatemala and two in Canada. The positions are listed under names like IQOS coach, commercial assistant, brand ambassador, hostess (using the Spanish term *azafata de imagen*), sales representative, and sales consultant, among many others. These names sometimes appear together in one listing, like “IQOS Coach (Sales Representative)” and “IQOS Brand Ambassador / Seller,” further muddling the distinctions between the different titles. Almost all of these positions are hired through third party hiring organizations like Grupo TEMA in Spain, Maxpromotion in the Czech Republic, and Adecco in a number of countries, rather than through the official Philip Morris job board. Exceptions include two positions in Canada that were posted on the main PMI website.

Recruitment campaign for IQOS coaches in Greece, Bulgaria, UK & perhaps elsewhere is called “Mission Amazing.”



<https://papastratosmazi.gr/missionamazing/coach090519/index.html>



<https://www.facebook.com/MissionAmazingBulgaria/>

As a whole, these jobs are sales positions, as indicated by some of the names. Accordingly, job requirements include supporting and helping customers with their devices during and after the sale. Job ads stress creating, maintaining, and utilizing a network of acquaintances. Many prefer or require a driver's license, presumably to attend IQOS promotional events, which Instagram photos show many employees staffing. Payment is generally fixed with the possibility of an additional commission. Only two job ads gave a minimum age (21 years, for two listings in the Czech Republic); only one asked applicants if they were a user of IQOS.

Although many of the positions are close to the same no matter their name, there are some with meaningful differences. Several positions in Spain appear to be for positions in independent tobacco shops (not IQOS stores), where employees are to “*support the tobacco dealer in the commercialization of IQOS.*” Another listing called “Internal Sales IQOS” looks to be remote work, helping IQOS users with their devices over the phone. In several listings, the requirements note that a “*blogger with followers will be valued*” in the hiring process, seemingly connecting these jobs with social media. Especially in the case of brand ambassadors, who represent IQOS at parties and events, some listings in Spain were looking for people with “*good appearance*” or “*good personal image.*”

Russian Instagram job invitation July 8, 2019 for a "Sales Expert (brand representative)!!"



Russian Instagram job invitation April 10, 2019 for “creative sales consultants.”



"Is there an interesting job in the Urals? The one you want to come to with pleasure and get decent pay?"



<https://www.instagram.com/p/BzsWjA9Cokc/>

<https://www.instagram.com/p/BxeM5HiCtIK/>

IQOS Coach & Influencer Campaigns by Country:

Israel: LEADERS seeding campaign

PMI's IQOS Israel Influencer Program (2017) was managed for the company by LEADERS, an Israeli headquartered, multi-national company. The plan was described as a "*seeding campaign*" for the country. Over half a million "*adult smokers*" were reached organically via unpaid, organic social media. This is a remarkable penetrance as 19% of Israeli adults smoke among a population of 8.7 million of all ages with 25.5% under age 14 - meaning that IQOS reached nearly half of all Israeli smokers. 64 influencers published IQOS photos, videos, or stories. We have posted a LEADERS video on their Israeli influencers program on our SRITA website: tobacco.stanford.edu/videos/iqos.

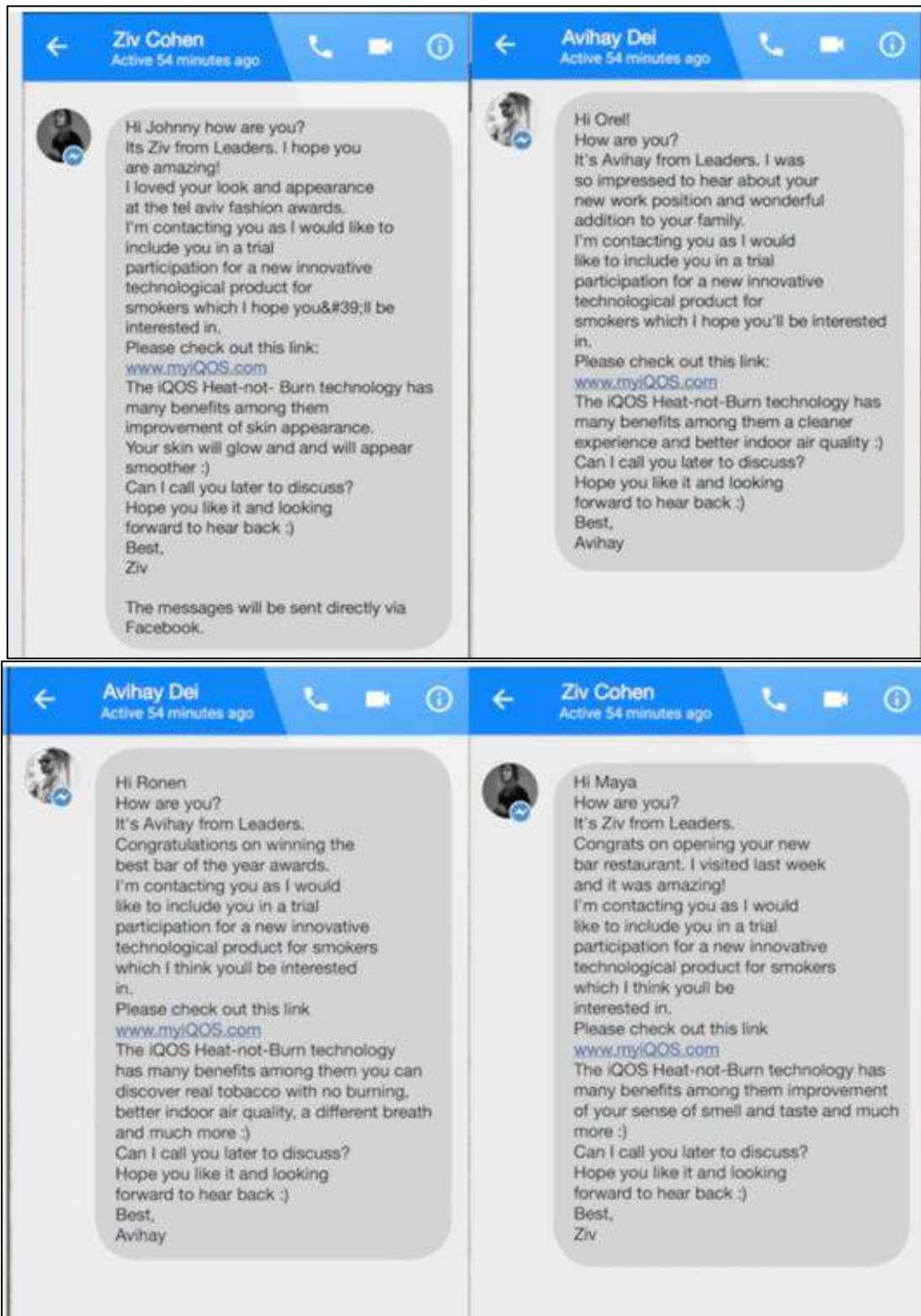


https://mediaspace.stanford.edu/media/IQOS+Adult+Smoker+Influencers+Campaign+Israel+2017/0_o5oy1y9s

STEP 1: MAPPING 100 RELEVANT ADULT SMOKER INFLUENCERS IN THE TEL AVIV AREA WITH PREDOMINANTLY ADULT FELLOWSHIPS BASE USING OUR OWN FACE RECOGNITION TECHNOLOGY	STEP 2: DIVIDE INFLUENCERS INTO 3 CATEGORIES: VANITY, SOCIAL, CONVENIENCE
STEP 6: 1 COACH WILL MANAGE ALMOST DAILY CONTACT WITH 10 INFLUENCERS	STEP 7: COACHES ARE CAREFULLY CHOSEN, EXPERT PROMOTERS WITH GREAT COMMUNICATION SKILLS AND EXPERIENCE IN MOTIVATING PEOPLE

	
RESULTS: FROM THE 148 CONTACTED INFLUENCERS, 101 HAVE ORDERED, RECEIVED AND TRIED THE PRODUCT	64 INFLUENCERS PUBLISHED PHOTOS, VIDEOS AND STORIES TO THEIR PERSONAL PAGES
OVER 523,517 ADULT SMOKERS WERE REACHED ORGANICALLY TOTAL 63,873 INTERACTIONS WERE RECORDED	110,000 UNIQUE WEBSITE ADULT SMOKER VISITORS 21,365 INTENTIONS TO ORDER

Israeli IQOS Influencer, hired by the influencer company LEADERS, soliciting fashion models and bars and restaurants owners via text messaging.



Israeli Influencers with thousands of followers promoting IQOS. The number of followers, while impressive, are much smaller than those in Eastern Europe and Asia.



Japan: Nippon Day Influencer Campaign

IQOS launched its largest known influencer campaign around April 23, 2019 in Japan, just a few weeks before PMI's suspension of its overall influencer campaign. The Nippon Day celebration, a device gifting and party for Japanese influencers, was crafted to come shortly before Japan's Golden Week, which celebrated the new monarch and the start of the Reiwa era; the holiday's theme of transition from one era to another parallels IQOS' tagline, *"this changes everything."*

Through analysis of content related to #iqosアンバサダー (#iqosambassador), our team was able to find posts from over 150 unique Japanese influencers with massive social media followings who posed with a limited-edition IQOS in red and white—traditional Japanese colors. PMI mailed the free devices to the local Japanese celebrities and invited them to the exclusive IQOS Nippon Day party, likely under the condition that the influencers post about their experiences. Each influencer wrote a post which started with the hashtags #IQOSThisChangesEverything, #IQOSアンバサダー and #IQOSJapan, and each one ended with the lines *"For more information, check the IQOS Store, the official IQOS site. This product for adult smokers is not without risk."* In the middle of the script, the influencers wrote more personal messages so long as they thanked @iqos_jp and described the limited-edition IQOS.

The accompanying photo shows attractive, well-dressed young people posing with their IQOS devices, in some cases at the exclusive IQOS event. Some of the influencers are wearing traditional Japanese clothing; all of the photos are professionally taken. None of the influencers were spotted actually smoking the IQOS, only posing with it. The influencers themselves were mostly women in their 20s; some were prominent bloggers or models, and quite a few were members of a famous Japanese Bikini Dancer group. All of the influencers had large audiences: anywhere from 12k to 359k followers. This final push by IQOS through its influencer campaign had a massive effect, with an aggregate of tens of millions of views of the product through social media platforms and accounts that weren't targeted only at adult smokers.

Nippon Day Influencer Campaign (Japan)

In late April 2019, IQOS launched an Influencer campaign unparalleled to those in other countries, enlisting 150+ influencers to attend an event and share their exclusive Nippon Edition IQOS 3/3 multi



4/25/2019
@yoyoshimi (Japan)
210k followers



4/22/2019
@cjd_naho (Japan)
88k followers



4/26/2019
@cjd_niri (Japan)
361k followers, verified

The influencers were given scripts to post in the captions of their photos as well as invitations to an exclusive IQOS Nippon Day Party

<https://www.instagram.com/p/BwtTgLLBuHV/>

South African Influencers

The Johannesburg launch of IQOS was held at The Roof in Fourways with actress Jo-Anne Reyneke was MC for the night with Fistaz Mixwell DJ. Mixwell has 90,000 Instagram followers.

Celebrities at Johannesburg launch of IQOS.



<https://city-press.news24.com/Trending/Socals/iqos-wants-to-help-you-quit-smoking-20190428>

From the magazine Afropolitan May 3, 2019.

“ The Afropolitan was invited by Philip Morris South Africa night to join a discussion with celebrated SA DJ, music producer and tech enthusiast, Fistaz Mixwell who revealed how he is making better choices while using technology to lead a better life in his 40's. **”**

“As a DJ I am on the road a lot and I am always on the lookout for tech and innovative products” said DJ Fistaz Mixwell. “It was a great experience to speak about the value of technological developments in my work and in my personal life.”

He spoke about how technology has impacted positively on his life talking about everything from headphones, to smart phones and some of his essential DJ equipment he incorporates into his life. He also mentioned how switching to IQOS, a better alternative to smoking, has helped change his life for the better.

<https://www.afropolitan.co.za/articles/powered-by-technology-and-innovation-9729.html>

In July 2019, Medical Brief, Africa’s medical media digest, published an article describing PMI’s use of influencers in South Africa, all prior to the influencer suspension. (Ref Legality of using) The article focused on Pearl Modiadie, a MetroFM talk show host whom PMI sent to Milan Design Week 2019 with all expenses covered. During her time in Italy, Modiadie posted around 20 IQOS-related photos and videos for her 2.2 million followers to see. In addition, the article claims that Modiadie is just “*one of at least five prominent social media influencers*” who have posted about IQOS this year.

Although this use of influencers in South Africa came before the influencer suspension, the campaign is still problematic in that influencer use goes against South African tobacco marketing regulation. The Medical Brief article references South Africa's 1993 Tobacco Products Control Act, which banned tobacco advertising, as well as a 2009 amendment to the act that prohibited tobacco companies from causing other people to advertise or promote their products. This is part of a more general tendency of the IQOS brand to ignore its status as a tobacco product until it is punished for doing so (other examples would be from France and Canada).



Czech Influencers at KVIFF 2018 (prior to influencer ban) and possibly KVIFF 2019 (after ban)

In July 2018, a Czech article in *Expres* reported that PMI paid a list of celebrity influencers who attended the Karlovy Vary International Film Festival in the spa town of Karlovy Vary, Czechia. (ref. Mchitarjan) The article reported on several IQOS videos from 2018 that described PMI inviting at least 20 bloggers and celebrities who were paid to promote IQOS on social media. (ref. Czech video) According to the article, some of the paid celebrities had never smoked or had previously quit entirely.

The celebrities posted IQOS-related content with the hashtag #iqosambassador, which influencer brand ambassadors used. Further, a celebrity influencer's IQOS-related post that was mentioned in one of the 2018 videos targeted a youthful audience with a question about summer vacation. (ref. Czech celebrity posts) Hejlova and colleagues identified 22 Czech influencers over 2018 to early 2019 with 10.5 to 95.6k Instagram followers. (Ref Hejlova). They described that IQOS was described: *"as a gateway to an aspirational, healthy, attractive and celebrity lifestyle."*

Czech Transvestite IQOS Ambassador.



<https://www.instagram.com/p/Bk-HA57Fwdu/>

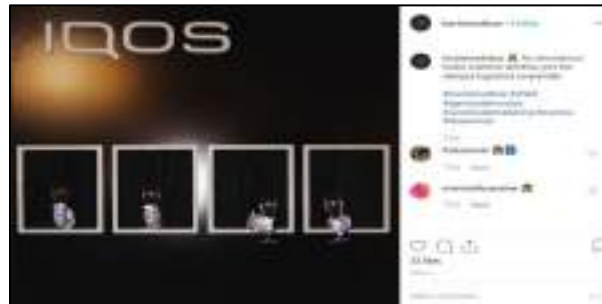
https://www.instagram.com/p/Bk_QhDElulp/

Spain

IQOS coaches in Spain follow the same mold as in many other countries. According to one coach, her job was divided between being a standard sales representative during the day and an event manager at night. In the morning, she noted, she and her team would go and hang out in public institutions such as restaurants to promote the product.

It appears that there is additional coach activity in the Canary Islands. Searching the #iqosclub hashtag, we came across a modeling team called Eventually Canarias which works both to sell IQOS devices and to host IQOS events. Some of these models are under 25, all are under 30, and the team is active on Instagram (*"A Casting Call"*).

Holding wine glasses out windows at an event.



<https://www.instagram.com/p/Bv6eQvwA54N/>

“Hostesses” performing salesperson functions (Canary islands).



<https://www.instagram.com/p/BtqU5t3otJo/>

Spain’s Got Talent winner Cristina Ramos with 73.4K Instagram followers.



https://www.instagram.com/p/Bu0wMtnoKqq/?utm_source=ig_twitter_share&igshid=1mjebk1j74u

Romania

Romanian Brand Ambassadors (BA) are part of what is likely a Romania-specific program. These BAs seem to all be women in the range of 22-26 years old. They commonly show IQOS devices used in day-to-day life, at events, and at IQOS spaces portraying the brand as an attractive, high-status lifestyle of travel and leisure. The BAs frequently attend music festivals and are also often seen with others from their coach teams.

A Romanian BA told us that it was a program only in her country, and there are negligibly few people with the title in other countries. In this program, Romanian IQOS coaches who post on social media can be selected for the title of brand ambassador. The two Romanian brand ambassadors who answered our inquiries claimed to not be paid for their online activity but rather posted as a “*hobby*” separate from their employment by PMI—a distinguishing factor from usual IQOS influencers. Further, Romanian BAs tend to have one to five thousand followers, which is fewer than IQOS hired influencers. A Romanian BA with whom we communicated said that she gets “*lots of benefits*” including gifts and event entry. Even more than with coaches, the brand ambassador position appears to be a way for IQOS to maintain a major social media presence, running what is essentially a micro-influencer program under the guise of employee posting.

The Romanian IQOS Coach program is just as flashy as that seen in Spain. The main coach team’s official name is #belikeme (<https://www.instagram.com/belikeme.ro/>). Members of #belikeme are the coaches who staff IQOS events at IQOS-affiliated locations like the Qreator and Shut-Up Beach. The team hires above the age of 19 and most of their members seem to be only a few years over. Some of them promote IQOS on their personal Instagram pages as Romanian brand ambassadors, even after IQOS’s influencer ban, in a manner analogous to influencer brand ambassadors (ref Manea).

The activities of #belikeme are extensive, and the team is hired and stylized to appeal to young people. They make overtly teen-oriented posts on their Instagram page, showing the young team members posing cheekily in boomerang-style videos popular among youth. They show up to events in ripped jeans, coordinated designer-style robes, trendy summer outfits, and letter jackets. Most of them are highly active on social media and frequently post about their IQOS adventures. The majority appear to be under the age of 25, and the vast majority seem to be under the age of 35. Even their name is youth-targeted: “*be like me*” echoes the “*Be Marlboro*” campaign in that, in order to be as cool and trendy as the models, teens need to use tobacco just like them.

Romanian IQOS Coach program (Ref #belikeme).



Russia

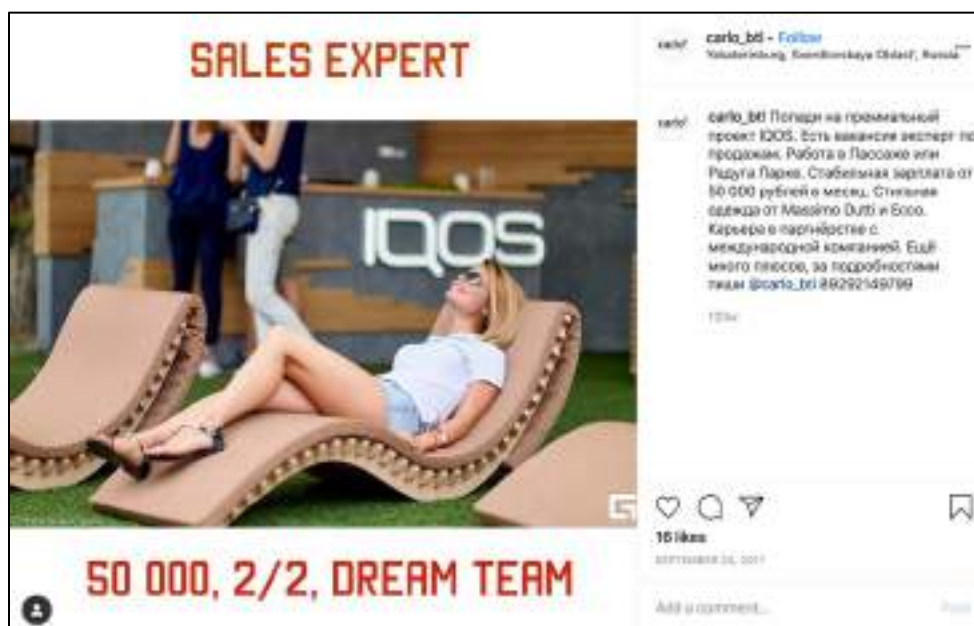
Russian IQOS coach teams are composed of young, attractive women similar to the Romanians teams. Coaches have been explicitly hired on the basis of their being young, tall, and attractive. They've also been hired if they have a nice car which is then outfitted with IQOS decals.

The two Russian coach teams we found were recruited by the hiring agencies BTL Carlo and RBT Yekaterinburg. The first agency, BTL Carlo, is interesting for a number of reasons. One is their past use of Tiffany Blue. Coaches were, for a several month period, outfitted and photographed in trendy Tiffany blue overcoats and vests, one of the more direct uses of the color we've seen by the brand. Another thing to point out about BTL Carlo is their having worn very youthful outfits at some events

BTL Carlo Russian coaches.



<https://www.instagram.com/p/BbKaGDyg36H/>



<https://www.instagram.com/p/BZbY5eugBcZ/>

BTL Carlo Russian coaches.



RBT Yekaterinburg (RBT Group) Russian Coaches.



<https://www.instagram.com/p/BvLZdKOAdId/>

<https://www.instagram.com/p/BrahO4qgAtj/>

The second agency, RBT Yekaterinburg, seems to have similar hiring practices to BTL Carlo and often adopts the same aesthetic. The leader of their team is also a model and a designer. Perhaps the most relevant of their activities is dressing up in designer racing tracksuits at Formula 1 Events.

France

IQOS salespeople in France seem less centralized given that the coach function is distributed through two third-party organizations, CPM France and GR Groupe International (from IQOS under the LinkedIn Employees tab for these companies). The function of coaches in France seems to be more limited. In a conversation with IQOS Sales Representative in France we were told: *"This is basically what we're allowed to do: We're obligated to wait for clients who are recommended by a partner tobacconist, if a client approaches us at the store and asks for information, we can then tell them more. But I can't, for example, speak to a client who simply walked in and didn't address me. That's the limitation: I can respond in full, but I can't engage customers on my own."*

In March 2018, an article in Le Monde reported on a complaint by 13 former PMI employees who worked promoting IQOS that they were manipulated by the company. The article reported that the employees had to sign a secrecy agreement about their activities and that their assignment was: *"Each person is then responsible for convincing smokers among friends, family members and acquaintances to buy IQOS during meetings at a partner café."* The article reported that such indirect tobacco advertising was illegal in France. (Ref. Treize anciens salariés portent plainte contre le cigarettier Philip Morris)

Italy

In Italy, as in other countries with more stringent regulations, coaches act as traditional sales reps, often working in IQOS stores. They can organize events and work locally and through their personal networks. Italy's IQOS coaches seem largely centralized, meaning that most list themselves as working for PMI rather than an outsourcing company.

Ariana Dimatteo 47.7K followers



<https://www.instagram.com/p/BtOcN6JBTGA/>

Fashion model Sara Finizio has 45.4k followers



<https://www.instagram.com/p/BhhEsdnZV2/>

Coach leaders and coaches are “cool.”



(“Alternativa alla sigaretta...,” 2018)

Ucupcake has 243k followers



<https://www.instagram.com/p/BuWmqChlRVH/>

Adalberto Carlitos (right) has 10.2k followers



<https://www.instagram.com/p/BQ1DRBphcuD/>

IQOS World Revealed by British sculptor Alex Chinneck in collaboration with Philip Morris International at Milan Design Week 2019. Chinneck works largely on abandoned architecture as his canvas. *"IQOS weren't trying to take that away any creative freedom. It was a fantastic opportunity as the partnership has facilitated an artwork that otherwise wouldn't exist. Their presence is more about brand and a new product, they weren't trying to force themselves into my work. It was a genuine dialogue. They've been great partners in terms of their commitment."* (ref Bokhina)

"Chinneck's IQOS world exhibition is expected to be visited by more than 50,000 people and is on view at Spazio Quattrocento on Via Tortona in Milan until April 14, 2019 as part of Milan Design Week."



<https://fadmagazine.com/2019/04/11/iqos-world-revealed-by-alex-chinneck-at-milan-design-week-2019/>



<https://mymodernmet.com/alex-chinneck-milan-design-week/>

According to a PMI official: *"The collaboration between Chinneck and Philip Morris International aims to present an artistic expression of the future. It seemed an obvious partnership to EU Region President Frederic de Wilde: "PMI is leading the transformation of the tobacco industry – one that is based on science and innovation," he explains. "Our aim is to create a future where smoke-free products like IQOS replace cigarettes to the benefit of society. It is precisely this thought, aimed at revealing an alternative vision of the future, which naturally guided our collaboration between IQOS and Alex Chinneck."* (ref IQOS World Revealed Schon).

According to the artist Alex Chinneck, as stated in multiple interviews: *“By taking familiar materials and architectural forms and making them behave in extraordinary ways, we are working with IQOS to change visitors’ perceptions of what is possible.”* (ref IQOS World Revealed Schon, Tuohy) The artist used phrases such as “change” and “*perception of what is possible*” both of which are drawn directly from the PMI IQOS marketing portfolio.

Indonesia

IQOS is relatively new to Indonesia (launched April 2019), and accordingly, the coach program does not appear to be fully developed. According to one coach in the country, coaches are already running events and facilitating the IQOS Club rewards program. Coaches are working closely with a select few customers, paired with them one on one, trying to build up a loyal product fanbase before mass activation (*“Terms of Use for Digital Touchpoints”*). The Indonesian IQOS site is locked unless you have an account which requires a coach to contact you.

While the IQOS community is small in the country, there is evidence of an extravagant rewards program there. The linked evidence shows expensive balloon centerpieces to be sent to just the first nine club members as an exclusive gift.

Indonesian invitation to IQOS Club with promise of contact by an “IQOS Expert.”



<https://www.instagram.com/p/Bu-8le0IOLY/>

United Kingdom:

Gabriele Gzimailaite is a full-time blogger about fashion who is also a compensated Instagram influencer (gabrielegz) with 119k followers. In February 2018 she joined a team of influencers and IQOS marketers at the London Fashion Week. Below is her description:

“During London Fashion Week, IQOS (heated tobacco technology) were kind enough to host me and a plus one at the Rosewood Hotel in London and try out Rosewood's IQOS friendly rooms which I actually didn't know were available in a hotel like Rosewood.

The first thing I have to note is that I was expecting the smell of tobacco in the room. Let's be honest, smoking/vaping inside can really make the place smell bad but my room was fresh from the minute I arrived to the minute I left the next day. That is a huge deal for me because I really dislike that 'I just had a cigarette smell' but of course IQOS doesn't smell anyway so that was all good. Also, we had hair and makeup artists come into our room in the morning so that meant we were ready for the day.

We also had drinks with the IQOS team in an IQOS friendly bar and a few other bloggers and influencers in the evening so it was really nice to chat about fashion week, Instagram and all things Iqos."



<http://iamgeorgwhite.com/a-night-at-the-rosewood-with-iqos/>

<https://www.toularose.com/2018/03/05/london-fashion-week-x-iqos-rosewood-hotel/>

<http://www.gabrielegz.com/2018/03/a-night-at-rosewood-with-iqos.html>

Stefan-Pierre is a London model, described as a supermodel with appearances in Vogue and GQ with 171k followers on Instagram. He claims on his Instagram account: *"I'm The Most Right Swiped Man on Tinder dating app."*



IQOS Use of Celebrity influencers

PMI uses the age-old strategy of using celebrities to drum up enthusiasm for its products. Studies have shown that celebrity endorsements add value and significantly increases positive attitudes towards the brand. The effect is particularly strong among adolescents between the ages of 12 to 18 years. The proliferation of images of celebrities attending and using IQOS on social media platforms such as Instagram targets young people, including non-tobacco users, and exposes them to tobacco marketing that they otherwise would not have been exposed to. IQOS use of celebrities was observed in Romania, Czech Republic, Russia, Italy, and Spain although this is undoubtedly only part of the story. As a general observation, the celebrity endorsers of IQOS are not “A-List” but rather more of the “B-list” variety. For example, Monica Cruz rather than Penelope Cruz.

At the launch of its IQOS 3 device in Spain, it held a spectacular event at the Cibeles Palace in Madrid that was attended by a number of prominent celebrities including Monica Cruz, Paz Vega, Alberto Amman, Joaquin Reyes, Topacio Fresh and others. Jamiroquai front lined the event that was attended by more than 600 guests.

IQOS 3 Presentation Madrid, Spain February 2, 2019.



<https://www.hawtcelebs.com/monica-cruz-at-iqos-3-e-cigarette-presentation-in-madrid-02-13-2019/>

IQOS 3 Presentation Madrid, Spain February 2, 2019.



<https://www.hawtcelebs.com/paz-vega-at-iqos-3-e-cigarette-presentation-in-madrid-02-13-2019/>



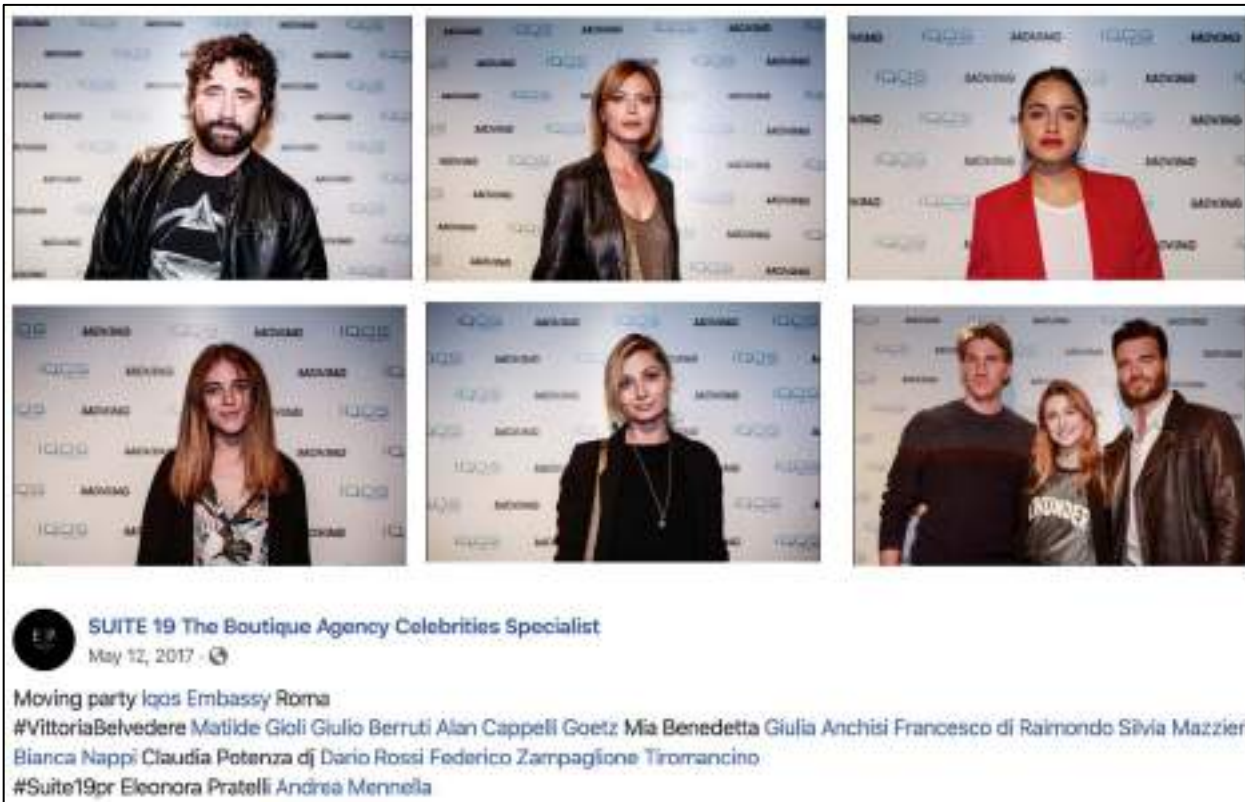
<https://www.hawtcelebs.com/macarena-gomez-at-iqos-3-e-cigarette-presentation-in-madrid-02-13-2019/>

Celebrities at the German premiere of IQOS 3 at the Museum of Hamburg History November 14, 2018.



<https://www.aedt.de/photos/20181125-til-schweiger-stellt-seine-neue-freundin-francesca-dutton-vor-medienpreis-der-kindernothilfe-2018-mit-natalia-wrner/1>

“Moving Party” at IQOS Embassy Rome by Suite 19. The boutique agency are celebrity specialists. (May 17, 2017).



<https://www.facebook.com/Suite19pr/videos/1350392388375263/>

Bambi Awards, Germany most prestigious media awards, Baden Baden, November 21, 2019.



<http://www.zimbio.com/photos/Naomi+Watts/IQOS+At+Bambi+Awards+2019/STsqSbMOxgj>

<http://www.zimbio.com/photos/Nastassja+Kinski/IQOS+At+Bambi+Awards+2019/NlhowK7vVMf>




<http://www.zimbio.com/photos/Frauke+Ludowig/IQOS+At+Bambi+Awards+2019/B0CrfunZP-O>

An IQOS promotional event in Madrid at NuBel space , the restaurant of the Reina Sofía Museum, attended by many young Spanish celebrities.

WE'RE GOING TO THE IQOS PARTY

WE CHAT WITH JOAN KORTAJARENA, ANA FERÁNDEZ AND MACARENA GARCÍA
ANA MACÍAS | PARTIES, FESTIVALS & EVENTS



♡ f t

We have gone to the IQOS presentation event . Thus, only with the name you may have no idea what we are talking about. We will give you a hint: it is an electronic device that they say has already conquered Asians and Europeans. You still don't know what we are talking about? We solve now! It is a device that heats tobacco without burning it, so there is no smoke or bad smells. What a relief for everyone who is bothered by the smell of tobacco! In addition, it has a minimalist and very attractive design. It looks like a mobile charger or an advanced technology machine.

At the party we were talking about **IQOS** and other things with Alba Gálchiz, Ana Fernández, Verónica Echegui, Hiba Abouk, **Macarena García**, Nerea Barros, Eduardo Casanova , Fernando Andina ... And above all, we were chatting with the model and actor **Joan Kortajarena** who led A singing voice at the event.



An article in *Celebrity News* (<https://capelino.com/>) described a Moscow celebrity video promotion of IQOS. Look in both: IQOS shot mini-series with celebrities.



Short videos of the Moscow celebrities tell the story of one day's work and share tips on how to make saturated everyday life much more comfortable.

Recently innovative brand IQOS, an alternative for adult tobacco users, introduced a series of rollers IQOS Stories, starring the Moscow celebrities. In each story, we are talking about a working day of the famous professionals of Moscow. For example, the makeup artist Andrey Shilkov creates a thumbnail image when the frame unexpectedly, it turns out that part of the creative process, which usually journalists and photographers silent, as DJ and stylist Sasha Fedorov shares his candid memories about moving from St. Petersburg to Moscow and tells how changing her routine of IQOS device. From the movie with producer Daria Yastrubitsky viewers learn how actually it works and rests. Soon a series of IQOS Stories will complement the long-awaited story on video of the President of the festival "Silver mercury" Mikhail Simonov. "Time Smoking in the kitchen and the stairs went. Now XXI century – the era of new technologies, allowing us to enjoy the comfort, focusing on the main thing", – says the hero of the project in his story.

<https://capelino.com/look-in-both-iqos-shot-mini-series-with-celebrities/>

Alina Ermia, a Romanian actress and singer, holds a gold colored IQOS in front of a Christmas tree. (December 29, 2018). She has 1.4M Instagram followers and her IQOS post has 44,685 likes.



<https://www.instagram.com/p/Br-UzF7gOj/>

Kati Varnava is a very popular Russian actress and comedian with 6.4M Instagram followers. Her IQOS post garnered 91,956 likes.



<https://www.instagram.com/explore/tags/iqosambassador>

Lukerya with 502k Instagram followers. . Her IQOS post garnered 6,662 likes.



<https://www.instagram.com/p/BV6220Ah-aE/>

Czech actress movie actress wit 387k Instagram followers. Her IQOS post garnered 7965 likes.



<https://www.instagram.com/p/BkvcgFug1yo/>

PeeetaaaTV a YouTube star with 497 videos has 114k Instagram followers and his IQOS posts garnered 25,637 likes.



<https://www.instagram.com/p/BkK5LSqAqGL/>

Media articles critical of IQOS use of celebrities: Translated from Czech



https://www.lidovky.cz/noviny/celebrity-inspiruji-deti-ke-koureni-nahrazka-cigarety-se-stala-hitem-socialni-site.A180827_203013_In_noviny_seb



<https://www.seznamzpravy.cz/clanek/cigarety-bez-koure-sdileji-celebrity-na-socialnich-sitich-je-to-na-hrane-zakona-rika-pravnicka-76546>

SECTION 6. IQOS RETAIL

IQOS Stores

IQOS stores are designed to reflect the company's desired image as modern and change-making. Much in the style of Apple stores, IQOS stores are sleek, full of light, and open, with a minimalist focus on technology. Assertive colors give the stores vibrancy, while uncluttered furniture and decor deliver a balance of visual cleanliness and comfort. IQOS spaces are designed to encourage smokers to linger and spend time "*discovering*" the product or connecting it with indulgences like coffee and chocolate. The frequent use of natural but manicured elements such as wood and artificial foliage contributes to a trendy aesthetic and serves as a breath of fresh air in what may otherwise feel like a more dull, traditional, and confining tobacco shop.



Further, the spaciousness creates a comfortable experience for customers taking their time in the stores. Thorstein Scheib, Director of Marketing for PMI in Munich, explained, "*Many adult smokers are interested in IQOS and want to get to know, touch and try this innovative product. In addition to taste, the consumption of tobacco products has a lot to do with touch and ritual - the interest is correspondingly high - and accordingly we need a lot of space in our boutiques. The time customers spend in our boutiques and pop-up stores is very long.*" (ref Burkert, 2017) Accordingly, IQOS stores offer ample seating and even cafés to encourage lingering and occupy customers while they wait for service.

To complement the open spaces, floor-to-ceiling windows let in natural light and serve to connect the stores to the outside world. These windows, one of many features mirroring Apple stores, serve to enhance the space inside the stores, invite passersby to enter, and increase public awareness of IQOS—the products inside are highly visible from the outside.

IQOS has made use of pop-up stores in various countries, which abide by many of the principles in this section, albeit on a smaller scale. Apparently, it favored this approach in Germany, as Retail Insider writes that "*While Parent company Philip Morris International launched permanent storefronts in Canada, its strategy in Germany involved launching pop-up boutiques which allowed them to introduce the product quickly to a large number of smokers.*" (ref???)

Examples of IQOS store fronts:





Some IQOS Stores are called “Boutiques”- to connote high end and fashionable merchandise.



IQOS Store Interiors

Lighting

In addition to natural light, IQOS stores utilize both bright white lighting and warm, soft lighting depending on their overall schemes. Those stores with cooler, harsher lighting seem more energetic and edgy, fitting in with IQOS’ modern theme, change narrative, and claims of cleanliness. Those stores with more warm, natural light, which tends to accompany light wood and other natural elements, appear more welcoming and connote nature, air, and health. A few stores feature small quantities of blue lighting to complement the IQOS logo and create a futuristic atmosphere. In some stores, spotlighting from above or below draws attention to the products in a manner resembling jewel cases or a museum exhibit.

Colors

At the center of the IQOS store palette are blue and white. In parallel with IQOS’ logo and most of its basic advertising, stores feature white walls accented with, among other designs, the IQOS logo and slogans in blue. GM Stand Design, which designed an IQOS exhibition stand, wrote about how the basic IQOS color scheme embodies *“light mist and freshness – the main associations with the vape,”* implying the IQOS aerosol is closer to water vapor than cigarette smoke. (2018)

Completing the green-to-blue color scheme found in many iterations of the IQOS logo, many stores feature green elements, with plants being the most common. This fake foliage is accompanied in its natural theme by the extensive use of light wood. In stores that emphasize natural elements, the

overarching color palette includes earthy beige tones, light and dark green, warm off-white light, and saturated colored accents in hues such as red and green.

In addition to cool modern elements and warm, natural colors, IQOS stores use pointed, bold colors to draw attention to individual products. Maybe even more than JUUL, IQOS takes the idea of a jewel case to heart and highlights small numbers of its metallic devices in well-lit museum-like displays on light wood tables. Specially designed holders exhibit rainbows of interchangeable caps and carrying cases, which glimmer in pinks, navies, and reds. Shelves at graceful inclines are built into walls or freestanding dividers, which allows employees to arrange HEETS cartons in mosaic-like patterns of orange and yellow. Simple color schemes for individual products—like the basic lime and white for the HEETS Green Label flavor—emphasize the cleanliness and modernity central to all IQOS branding. The bright colors of the products and wall signage are sometimes backgrounded by black to exaggerate the color contrast and balance out the stores' lighter shades.

Two findings, the IQOS Talkbox and an article from the Italian IQOS news site, suggest that IQOS store designers' color choices have to do with intended mood. The latter knowingly states that [translated]: *"Color conditions and interacts with human emotions...According to the psychology of color, in fact, every shade has a different influence on a given feeling. For example: red can infuse courage and security, blue conveys peace and serenity."* While the exact color choices of the designers are harder to decipher, it's clear that they use color choice in an attempt to influence customer mood and attitude toward the store. The designers are aware that people smoke with the intention of feeling a certain way, and colors can help induce those feelings. Creating this connection between IQOS devices and the positive mood experienced while in the store leads the customer to believe that using IQOS will have a positive effect on mood or that the device should be used when in a good mood. The designers' intention is in line with cigarette advertisements that advise people to smoke either for a *"lift"* or to better one's *"disposition."*

Natural materials

IQOS stores and spaces incorporate a wide range of natural materials. In addition to the clear message that IQOS is healthy and sustainable, each material holds several additional unique meanings.

First, extensive use of wood (e.g., paneling and craft benches) produces a sense of craftsmanship and promotes relaxation through an association with domestic environments. High-quality walnut paneling throughout the stores helps to maintain a modern aesthetic without making the environment seem artificial or cold.

Next, tropical leaves and plants bring to mind themes of paradise and pleasure. Tropical plants such as ferns, which often surround IQOS signage, vividly call to mind the outdoors and beaches in particular—potentially a nod to IQOS' beachfront parties.

In contrast to the lush tropical aesthetic, IQOS stores sometimes make use of light green grasses, mosses, and grass bulbs, which almost look extraterrestrial. These decorations are a light, natural element that doesn't break continuity with the futuristic aesthetic.

Shapes

IQOS stores at times utilize unique geometric shapes in their displays, walls, and decorative elements. The IQOS exhibition stand designers at GM Stand Design explained that they *"used acute and moderately aggressive shapes to demonstrate the fast development of the products and the dynamics of*

the company." While the shapes used in current IQOS stores are usually not as sharp-edged, the same sense of speed and lightness is evident in their streamlined forms.

Another repeated feature in IQOS stores is the pattern of interlocking hexagons. In addition to being sharp, appealing shapes, hexagons may have several significances. When made from wood, the hexagons resemble beehives and combined with the warmth of the wood, they may connote honey and sweetness. They also may represent the ends of rolled and stacked HEETS. Additionally, they convey a sense of connection and harmony while maintaining IQOS' geometric style.

A persistent visual theme in IQOS stores is a lack of bulkiness. Large elements are often broken up into pieces and painted with light colors. As IQOS designers have noted, these delicate and light visuals are an intentional style choice: *"To emphasize the weightlessness of the design we're only using either the transparent furniture or the variations of wire chairs. All of the elements are united by the idea of air and lightness that are at the core of the product."* This emphasis on weightlessness is also a proxy for harmlessness and a lack of smoke.

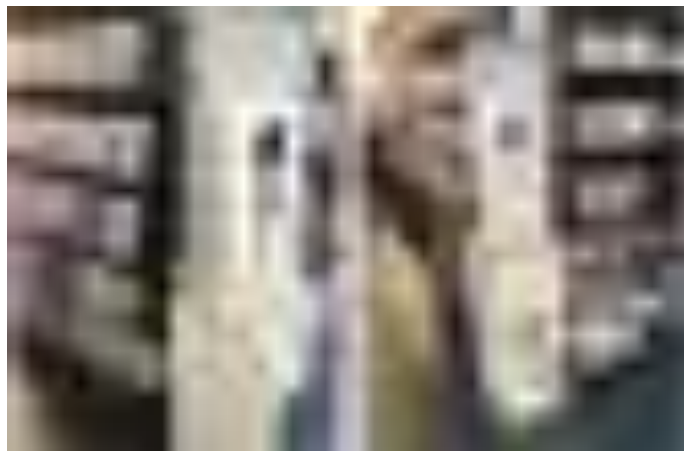
Wall text

IQOS stores often feature slogans on at least one wall in addition to the IQOS logo text. IQOS' main slogan, *"this changes everything,"* appears most frequently. Other slogans featured in stores include *"hello happiness," "enter a new beginning,"* and *"A burning problem. A new found inspiration. And now a solution."* One campaign has city-specific slogans reading *"your Munich will change,"* for example. In other cases, the text is a single word such as *"discover," "pleasure," "air," "taste," "heat,"* or *"clean."* Some text is more informational, such as *"heat not burn technology,"* and *"real tobacco."*

Technology

Along with the IQOS tech on display, IQOS stores make heavy use of technology as part of their branding. Video screens are used to display ads in many stores. In some, users can use touchscreens to browse products and learn more about the development and components of IQOS. Other stores feature VR headsets, like some of those in Japan, which run a video called *"Dynamically IQOS."* While it is unclear exactly what this video is, another IQOS VR video shows that at least in some stores, the VR programming is just advertising. There are also some one-off tech items, like the case designer in the Tel Aviv store, where customers can design their own IQOS case on a large touch screen display (complete with youthful, emoji-like stickers) that will then be printed from a specialized machine right then and there.

IQOS display adjacent to children's videos.



<https://twitter.com/tselengidis/status/1210671800654413825/photo/2>

Interior of IQOS Stores.

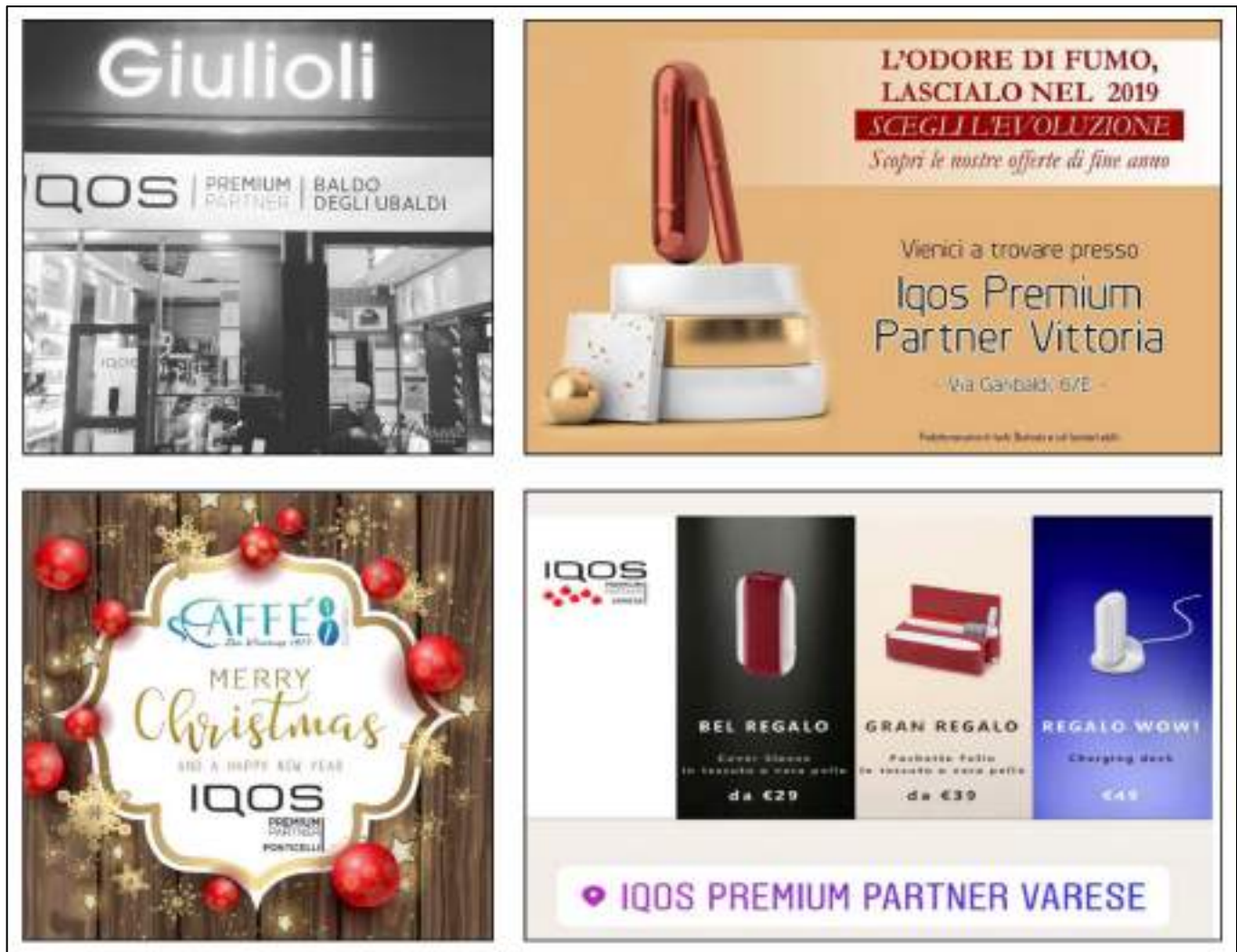




IQOS “Premium Partner” Program is an arrangement with selected retail outlets, especially in Italy.



IQOS “Premium Partners” – apparently favored independent vendors.



Sampling in Stores:

It is clear that at least some IQOS stores allow customers to use the device then and there. This is most clear in Japanese IQOS stores: in them, customers can choose and take from a tray of HEETS and HeatSticks to try, allowing them to find a flavor they want. Videos of events in stores also appear to show attendees trying IQOS. However, other than informational signs encouraging testing that accompany the trays in Japanese stores, there has been no documentation found that explicitly allows for flavor sampling.

Sales people explain the IQOS system, demonstrate its use, and offer potential customers to try flavors.



The pathway to profitability for IQOS is via repeated sales of its tobacco consumables. IQOS stores prominently feature cartons of HEETS equivalent to a carton of cigarettes.



A variety of IQOS Accessories are sold in some IQOS stores.



Seeking to differentiate IQOS from cigarettes, IQOS places feature no smoking, but yes IQOS signs.



Laboratory demonstrations in IQOS Stores.



https://geo.pro/reportage/18182-zagolovok-iqos-provel-v-orenburge-vecherniy-literaturnyy-kokteyl/?photoid=1045100&sphrase_id=175845

At the IQOS store in Tel Aviv, customers can design their own custom case, complete with bright colors and youthful stickers like those seen on messaging apps like Facebook Messenger. The machine attached to this screen prints the cases right then and there with a specialized printer. Designed by the Visualaid design company as seen here: <https://www.visualaid.co.il/portfolio/philip-morris/>



When Health Canada informed IQOS that law prohibited the name of any tobacco brand on a store front, the company changed the name to “Q-Lab.”



<https://www.retail-insider.com/retail-insider/2019/3/iqos-announces-new-name-after-health-canada-bans-storefront-signage>

While permanent IQOS stores are located in prominent “high street” locations, temporary “pop up” stores appear in shopping centers and other high traffic location with the goal of introducing the product to a wide audience.



Not surprisingly, IQOS places displays within tobacco shops.



IQOS store- Czech shopping center in front of a toy store. IQOS colored cookies (macarons): mall kiosk.



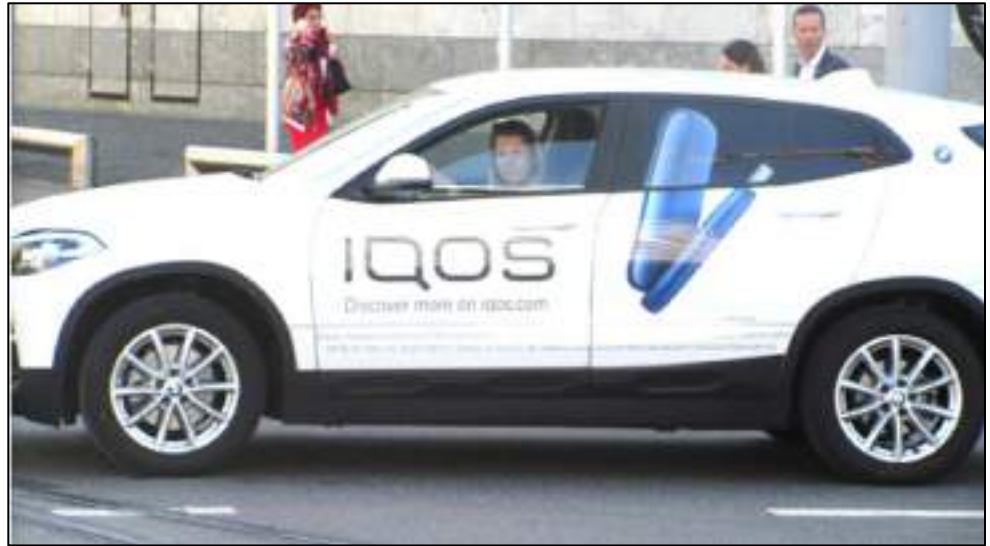
<https://koncept6.com/our-work/iqos-pop-up/>

Race car game in IQOS store.

Santa Domingo, Dominican Republic.



IQOS decorated BMW in Switzerland.



https://www.google.com/maps/uv?hl=en&pb=!1s0x8eaf895313c39fc3%3A0xafac59bf24bc92b713m1!7e115!4shttps%3A%2F%2Fh5.googleusercontent.com%2Fp%2FAF1QipOpFXaueAc1dTS1VYwGMI6SpcEW3fuca2HWU3EQ%3Dw172-h174-n-k-no!5s%22iqos%20boutique%22%20-%20Google%20Search!15sCAQ&imagekey=!1e10!2sAF1QipPAQzZsRVQH3BAsqyPI6gzsguBiKr_NzkuD1iu

<https://www.google.com/maps/uv?hl=en&pb=!1s0x479aa14c30932817%3A0x18ba103cedf7fa31!3m1!7e115!4shttps%3A%2F%2Fh5.googleusercontent.com%2Fp%2FAF1QipPpne18UCUwOxGE2fRN14vy7mzAmwuYlqfklUmo%3Dw172-h174-n-k-no!5s%22iqos%20boutique%22%20-%20Google%20Search!15sCAQ&imagekey=!1e10!2sAF1QipMGAE4I03I6T77jtd1KptxnteBAKVqqnWOzsyag>

Salespersons in IQOS stores are typically young and attractive.



https://geo.pro/reportage/490482-4-vkusa-vesny-vstrechayte-novye-khity-ot-iqos/?sphrase_id=17469

https://geo.pro/reportage/476769-literaturnye-chteniya-glavnogo-redaktora-zhurnala-maxim-aleksandra-malenkova-vo-flagmanskoy-butike-i/?sphrase_id=174677

Salespersons in IQOS stores are typically young and attractive.



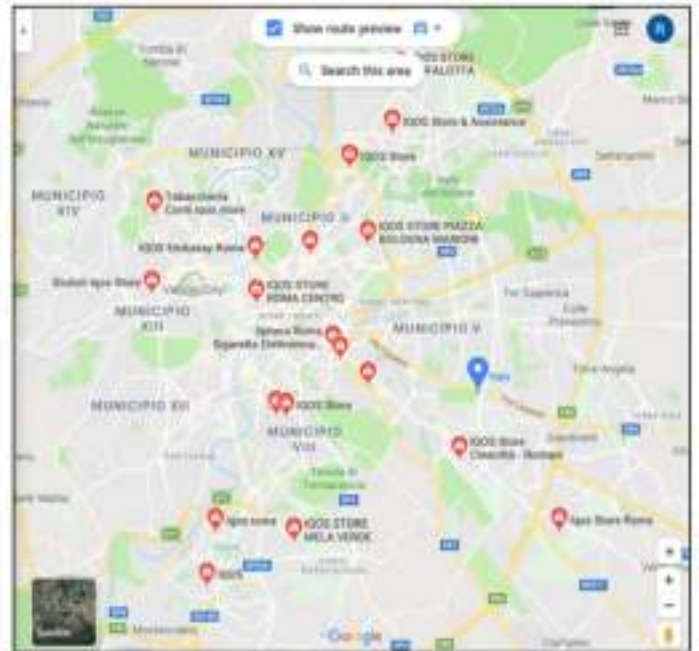
https://geo.pro/reportage/464152-iqos-festival-ulichnoy-edy/?sphrase_id=175845

IQOS retail locations are quite numerous.

IQOS Stores in Germany



IQOS stores in Rome



Locations in France and Spain selling IQOS products illustrating the nationwide penetrance.



https://www.google.fr/maps/d/viewer?mid=1ruj4o-79Shlij5_AiC9meYN97hs&hl=fr&ll=46.82283133750002%2C1.0912754003808232&z=7



https://www.google.com/maps/d/u/0/viewer?mid=1UfTx4qyb55C6sXG1lOcvrlos_sg&ll=39.97598115578458%2C-2.3107619499999146&z=7

DUTY Free Stores

Duty free stores emphasize luxury brands to their relatively wealthy clientele. IQOS is sold in a number of prominent international airports around the world, with displays sometimes located adjacent to Marlboro cigarettes. In some airports, large LED screen display IQOS advertisements.

IQOS in airport duty free.

Beirut



Dubai



Seoul



Osaka



Dubai



Moscow



IQOS display in a duty free stores. Note the adjacency of PMI premier products Marlboro and IQOS including the iconic red chevron.



"Traveller Exclusive" Duty Free version of IQOS 3 in "Radiant Red."
IQOS on sale adjacent to its heated tobacco competitor Glo (British American Tobacco Company).



A 2018 design folio from GM Stand Design, evidently for a trade show exhibit emphasized: “Freshness, nature, wings, geometric shapes.” (ref. GM Stand Design)



The following is a summary of the key findings from the research conducted for the IQOS trade show exhibit. The research was conducted in 2018 and focused on understanding the needs and preferences of the target audience for the exhibit. The findings are as follows:

- The target audience for the exhibit is primarily composed of individuals who are interested in the IQOS brand and are looking for information about the product.
- The exhibit should be designed to be visually appealing and easy to navigate, with clear signage and a logical flow of information.
- The exhibit should include interactive elements, such as touchscreens and video displays, to engage the audience and provide a more immersive experience.
- The exhibit should be located in a high-traffic area of the trade show to maximize exposure and engagement.
- The exhibit should be designed to be flexible and adaptable, allowing for changes to be made as needed during the trade show.



SECTION 7. IQOS FRIENDLY PLACES

IQOS friendly spaces are designated spaces in which IQOS users are free to use their device where cigarette use would not be allowed. Such places are designated restaurants, public spaces, clubs, cafes, bars, and beaches and have numerous international locations. In order to become a designated IQOS friendly establishment, either IQOS reaches out to the establishment for partnership inquiries (usually) through a third party agency, or restaurants and bars apply for IQOS friend space license through the IQOS website. These extensions of IQOS into public spaces is a way for IQOS to expand their branding reach to the general population and other lifestyle followers. Additionally, the branding of IQOS exposes the device to younger audiences as restaurants and beaches are not restricted by age, and children with families will be able to see the sleek branding of IQOS.

With the growing number of IQOS Friendly places worldwide, these locations create an opportunity for IQOS to continue to associate and pair their device with mundane things like eating, lounging, food, and alcohol. Having IQOS branding just like a beer brand on the store promotes the likeness of IQOS to food or beer and reinforces the message that IQOS is meant to be enjoyed habitually like food and drink.

An “IQOS Spot” is a location where smoking is prohibited but IQOS use is permitted.



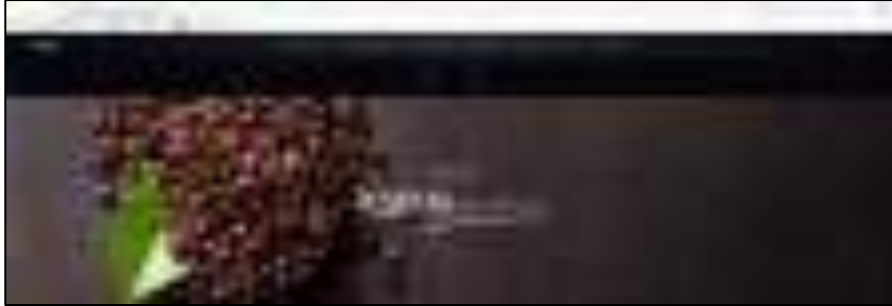
Underlying the IQOS Friendly Places program is the concept PMI promotes that IQOS is “unsmoke” and thus does not lead to harmful secondhand exposure from the exhaled plume. As illustrated from the pictures below (IQOS Boutique in Odessa, Russia) IQOS use is associated with a substantial exhaled volume of aerosol containing nicotine, glycerin, and combustion products from smoldering tobacco leaf. The goal of the Friendly Places program is to undermine regulations which forbid indoor smoking. This allows smokers of regular cigarettes an alternative way of smoking when in bars, restaurants, etc. Such dual use, common among IQOS users, closes nicotine exposure gaps during the day and actually deepens addiction.



https://geo.pro/reportage/454695-taki-da-iqos-uzhe-v-odessa/?sphrase_id=175845

IQOS Cafes

IQOS Cafes are coffee shops that are centered around IQOS and run by the company. They focus on the connections between IQOS and coffee and provide a space where people can comfortably use and buy IQOS products. The cafes resemble IQOS retail stores, with a modern and minimalist aesthetic and a heavy reliance on light natural wood. They're heavily branded with IQOS mugs, napkins, coasters, and thermoses. Additionally, customers are encouraged to pair coffee flavors with corresponding HEETS flavors. IQOS cafes promote a sense of comfort, relaxation, and ease with respect to device use. They also send the underlying message that IQOS is as benign an addiction as coffee and a tasteful consumable product that pairs well with food.



IQOS Café on wheels, Romania.



https://www.instagram.com/p/BOAHX_YDVfl/

<https://www.instagram.com/p/BN4y59bDya3/>

Co Lab Café in Madrid, Spain



<https://www.instagram.com/p/BkkroF4I-TV/?hl=en>

IQOS Café. Brno, Czech Republic



<http://m.tabakhouska.com/album/fotogalerie-iqos/kavarna-0003-jpg/>

IQOS Signature Café, Tokyo.



<https://mobiledesign.com/index.php/2018/04/06/iqos-heets/>



IQOS Signature Café, Vietnam.

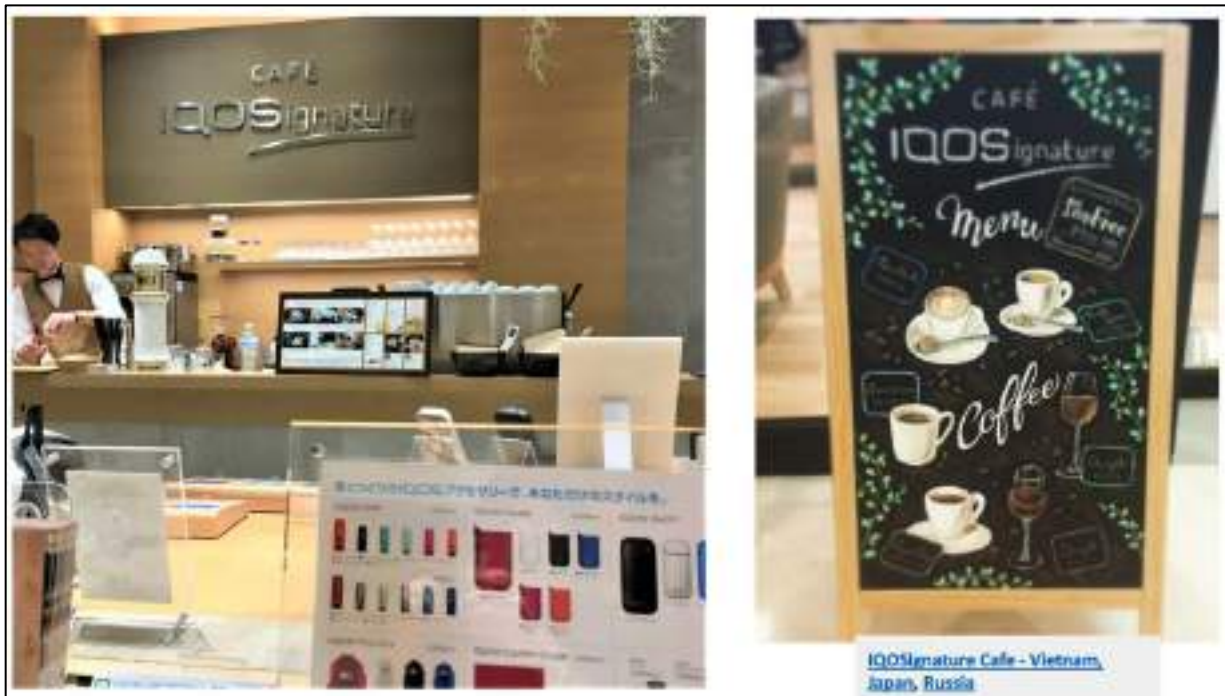


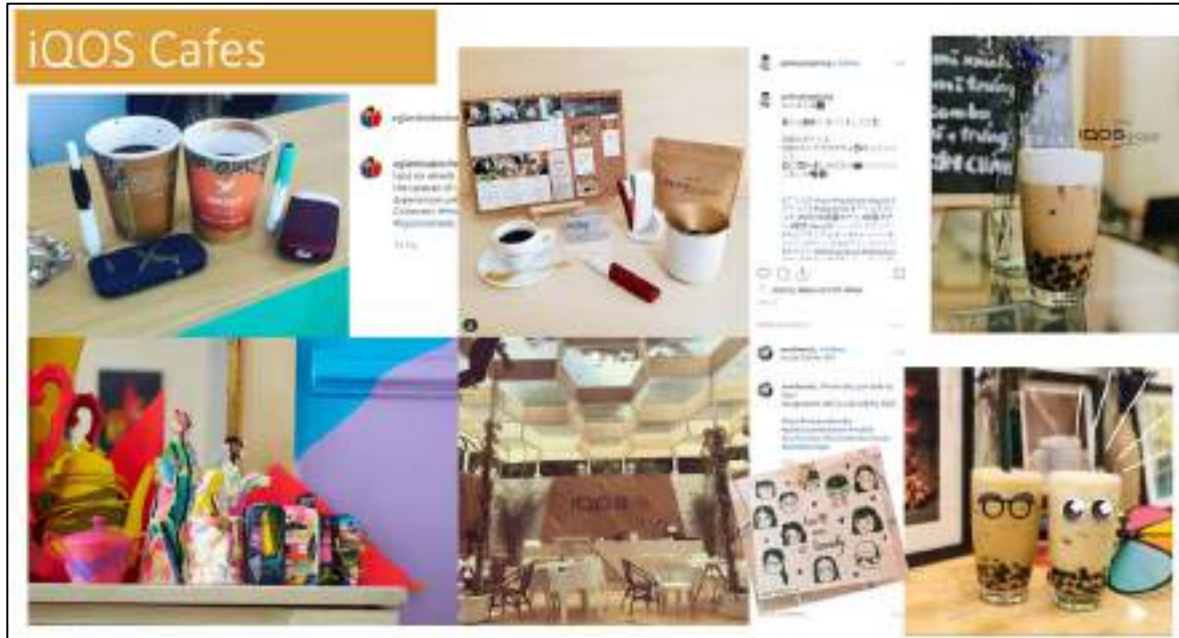
<https://www.facebook.com/iqoscoffee/>

IQOSignature Cafe

IQOSignature Cafe has the most locations out of all the IQOS cafes. It seems to be a chain with a few locations in Japan in Ginza, Sapporo, and Nagata-chō; one store in Vietnam; and another in Russia. They advertise “*IQOS x Coffee Marriage*” with a menu that guides users to a coffee that matches the taste of a specific HEETS flavor. Similarly, they’ve paired macarons and chocolates with different HEETS. At the Sapporo location, a customer wrote a review on their Facebook page explaining how IQOS users get one free cup of coffee every day, free Wi-Fi, sometimes free cleaning sticks, and a free drink of alcohol after 5 pm. Since these perks are most likely exclusive to IQOS users, this is problematic because it rewards IQOS users for their smoking. These deals and free rewards incentivize IQOS users to continue smoking and lure non-IQOS users to join the community.

IQOSignature Cafe: <https://www.facebook.com/iqoscoffee/>





This campaign was a collaboration with patissier Sadaharu Aoki (left). It was intended to evoke the flavors of IQOS HEETS through food: the “Chocolate Marriage” campaign matched six chocolates with six flavors of HEETS, and the macarons were meant to mirror the flavor of the newly launched Tropical Menthol HeatSticks. The drink on the right is IQOS Odessa, Russia.



<https://www.instagram.com/p/B09-FrkgBYm/>



https://www.instagram.com/p/Bt_FwkWF_GU/





We have posted an IQOS cafe videos on our SRITA website: tobacco.stanford.edu/videos/iqos.

IQOS and Co.

IQOS & Co., which used to be called IQOS Co_Lab Cafe in 2018, is located in Palacio de Santa Barbara in Madrid and is much bigger than the other IQOS cafes. This revamped restaurant is restricted exclusively to people over the age of 18 and is a temporary establishment that opens for the summer and early autumn months in collaboration with Larrumba Group. The restaurant is described as being an “open, cosmopolitan and eclectic space” with different areas, including a terrace to enjoy food and drinks, an IQOS store where people can customize the product, and a space to compare the technology of IQOS and the combustion of a cigarette. Additionally, the space features a series of workshops that showcase lifestyle trends to target IQOS users. It is evident that the restaurant’s complex design and numerous areas are branding IQOS as a refined product to those who are interested in the latest trends and value deluxe items. The description of the restaurant on their website uses very elevated language and makes IQOS seem like a product of high innovation and the perfect pair to a luxurious meal in an exclusive lounge setting.

In addition to food and drink, IQOS & Co. has promoted the restaurant as a creative coworking space in which people can experience an active, fun social environment that encourages collaboration between teams. Oftentimes, the restaurant will hold events and invite bands for performances or artists for exhibitions. IQOS goes above and beyond to brand this location as a relaxed and open space where people can enjoy high-class food, company, and IQOS, rather than a restaurant that is simply “IQOS Friendly.”

IQOS & Co.

<http://iqosandco.es>

IQOS & Co. Menu**IQOS Friendly Spaces**

IQOS friendly spaces are designated spaces, like restaurants, clubs, cafes, bars, and beaches, in which IQOS users are free to smoke their device while cigarette smokers are not. In order to become a designated IQOS friendly establishment, either IQOS reaches out to the establishment for partnership inquiries, usually through a third party agency, or restaurants and bars apply as IQOS friendly space through the IQOS website. For instance, in Japan, there is a website where restaurants and other establishments can apply to receive IQOS friendly certification. There is no advertised fee for establishments to become an IQOS friendly space. The website provides a list of benefits that come with

being an IQOS friendly space, such as *“differentiating with other stores, bringing in new customers, and improving corporate attitudes and impressions.”* The biggest benefit to establishments to being IQOS friendly appears to be advertising, as the IQOS friendly establishment will be promoted to IQOS users through official IQOS websites and apps. For example, the Czech Republic’s website advertises their large number of IQOS friendly establishments through articles about community acceptance of the device as well as an extensive map of all such locations. Such maps are also accessible through the IQOS Connect app, a mobile app that allows users to change settings on their IQOS devices as well as locate the nearest IQOS friendly establishment.

As IQOS continues to reach out to restaurants, bars, and other establishments, we are finding that IQOS has continued to extend its brand far past tobacco. In fact, many Ukrainian, Czech, Japanese, and Russian magazines have already picked up on the trend. These articles that feature stories such as *“Top 5 IQOS Lounges/Restaurants”* are reaching many of the top trendy lifestyle magazines, which possibly reach younger audiences. These articles may be sponsored by IQOS, though that relationship is not disclosed if it exists. If IQOS is sponsoring the articles, it is an indication that the brand is putting substantial resources into extending itself through the friendly space partnerships. Additionally, friendly spaces with IQOS branding expose the device to younger audiences. Affiliated restaurants are not necessarily restricted by age, so children eating with their families will be exposed to an IQOS smoking environment.

Lastly, the increase in IQOS friendly locations creates an opportunity for IQOS to continue to associate and pair their device with mundane things like eating, lounging, food, and alcohol. Having IQOS branding just like a beer brand on the store analogizes the two and reinforces the message that IQOS is meant to be enjoyed habitually like food and drink.

Signs for IQOS Friendly Places.



Romanian IQOS Friendly Beach that heavily promotes IQOS and throws parties that are sponsored by IQOS. In Romania (2015), the Romanian Parliament adopted a law banning smoking in public areas. The law, that came into effect on March 2016 forbids smoking in any closed environment for public use, defining a closed environment as one having at least two walls. The beach is family friendly and allows kids to be around this public space where IQOS is allowed.

IQOS Friendly Beach in Cartagena allows users to use their IQOS and even get special deals if they are IQOS users. In Colombia, the law extended its existing tobacco control regulations by requiring all indoor work places and public places be immediately smoke-free; prohibiting tobacco advertising, promotions and sponsorship. This beach is likely sponsored by IQOS, and since IQOS is a tobacco product, this *“IQOS friendly beach”* could be breaking laws.

Shut up Beach Romania July 30, 2018

<https://www.instagram.com/p/BI3QhUGBIYW/>

Purple Beach Club January 10, 2019

<https://www.facebook.com/pages/category/Bar/Purple-Beach-Club-Cartagena-2087258818033864/>



<https://www.instagram.com/p/Bmvtko8gpx8/>

<https://www.instagram.com/p/BzJLkhJhJW1/>

A wedding at IQOS Shut up Beach event. An infant the event – note the children's swing.

<https://www.instagram.com/p/BlgXDx2Bx2v/>

<https://www.instagram.com/p/BlIm-RhDstQ/>

<https://www.instagram.com/p/BYB1KuOgNM6/>

Balloon rides and movie night at IQOS beach events.



<https://www.instagram.com/p/BwzoKZeAoDv/>

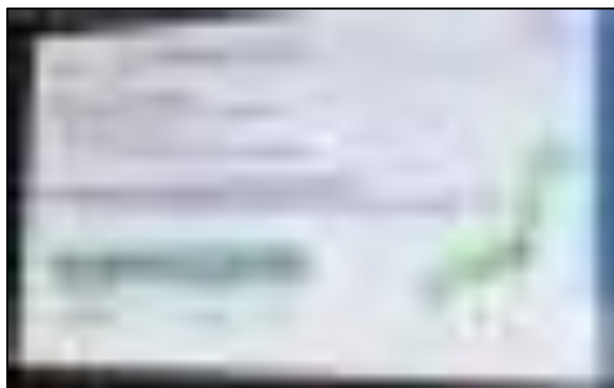
<https://www.instagram.com/p/Bml2yjWBxDz/>

<https://www.instagram.com/p/BXX90rUgZ8o/>

IQOS Friendly places in Bristol, England.



PMI lobbies intensively to enable use of IQOS in smoke free locations. An article in UNIAN in December 2016 quoted a PMI official on achieving permission for IQOS to be used in smoke free zones in Japan "We made more than 10 thousand meetings with government officials. As a result, one after another prefectures in Japan began to remove restrictions on the IQOS use in public places that became as an additional incentive for smokers to give up conventional cigarettes." (ref. A farewell to smoking). The PMI official added: "Employers realize how beneficial it is – if a person does not spend every hour going on a smoke break, time to get to the smoking room and return to the workplace, and began to encourage smokers to switch from cigarettes to IQOS."



<https://www.unian.info/society/1695492-a-farewell-to-smoking.html>

IQOS Friendly Places: Bars.

Rock Bar Bourbon Odessa, Russia



FULL Bar in the BARVY restaurant , Kiev, Ukraine



https://od.vgorode.ua/news/dosuh_y_eda/359946-IQOS-Friendly-top-6-zavedenyi-v-odesse-dlia-bar-kroulynha
<https://cf.ua/news/news-cf/5-prichin-pochemu-zavedeniyam-nuzhno-byt-iqos-friendly&prev=search>

PhoeniX Bar. Dnipro, Ukraine



Cubo Bar Quinta Do Lago, Portugal



<https://www.instagram.com/p/Bj68oDGhea2/>

<https://www.instagram.com/p/BS1jdCahFt8/>

IQOS Friendly Places: Restaurants.

Sushiandmore Restaurant, Vinovo, Italy



Meatandburger Restaurant, Lviv Oblast, Ukraine



<https://www.instagram.com/p/BI7pjWRhXbs/>

<https://www.instagram.com/p/BsLhs0A4dS/>

IQOS Friendly Places: Nightclubs.

Kaiser 53 Czech nightclub

The Addison's Nightclub, Toronto, Canada



<https://www.instagram.com/p/BkylTaugOd7/>

https://images.squarespacecdn.com/content/v1/5b87add212b13f89f26221ec/15356272306100FK9ARR7XG2MK553CQCA/ke17ZwdGBtoddI8pDm48kEAaxpLObXaNeg5HPwE_KI17gQa3H78H3Y0txjaiv_ofDoOvxcMmMKkDsyUqMSsMWxHk725yiiHCCLfrh8O1z5QPOohDlalelJMHgDF5CVIOqpeNLCJ80NK65_fv7S1Uf5vlu45_0A1UYqXAYmr5DijTQG9P1oDxRbwF4UsWjPxdLwnFH5Fwykx4_DJJxhXw/IMAG2837_1.jpg?format=500w

IQOS Friendly Places: Barbershop, nail salon, beauty parlor, clothing store.

Yourspace beauty parlor Kiev, Ukraine

Black Lion Barber Shop Moldova.

Laque Nail Salon, Khariv, Ukraine



<https://www.instagram.com/p/BrFv4j4HO1t/>

<https://gramho.com/media/1820363633328070408>

<https://www.instagram.com/p/BxRePOrnJv>

Gridress showroom clothing store, Kharkov, Ukraine. IQOS and Tripadvisor!



<https://www.instagram.com/p/Budq9y-B3lw/>

<https://cf.ua/news/news-cf/5-prichin-pochemu-zavedeniyam-nuzhno-byt-iqos-friendly&prev=search>

Map of the impressive density of IQOS friendly places in the Czech Republic. As you can see, there are innumerable establishments that have allowed IQOS in their space.



https://www.my-iqos.cz/Kde-muzete-pouzivat-IQOS-seznam-IQOS-Friendly-restauraci-a-provozoven-na-mape-A_6508

2286 Places where IQOS can be used in the Czech Republic. Note that 38 places lie within 1 km of a map point in central Prague.

 A screenshot of a web application displaying a list of 2286 IQOS-friendly places in the Czech Republic. The list is organized into several columns, including place names, addresses, and contact information. The text is somewhat blurred but the structure is clear.

<https://www.mapotic.com/iqos-friendly-cz/places?lat=50.07653192285462&lng=14.447021484375002&zoom=10>

IQOS Lounges

IQOS Lounges allow use of IQOS, but not cigarettes, and often serve food and alcoholic beverages. "Visitors have the opportunity to learn from the sales experts about the latest IQOS news and events and benefit from the cleaning and charging service of their device."

IQOS Lounges



[IQOS Lounge Andorra](#)



[IQOS Lounge Menu - Andorra](#)

IQOS Lounges



[IQOS Lounge Milan](#)



[IQOS Lounge Riccione](#)



[IQOS Lounge Barberino](#)



[IQOS Lounge Andorra](#)



[IQOS Lounge Rome](#)

Mountainside IQOS Cocktail Lounge and restaurant (gastropub) Grandvalira, Andorra. “The terrace offers a lounge with hammocks for you to relax as you enjoy the ambiance created by our DJs, a restaurant with a wide range of cuisine and cocktails, and an IQOS store offering a variety of products and accessories.”



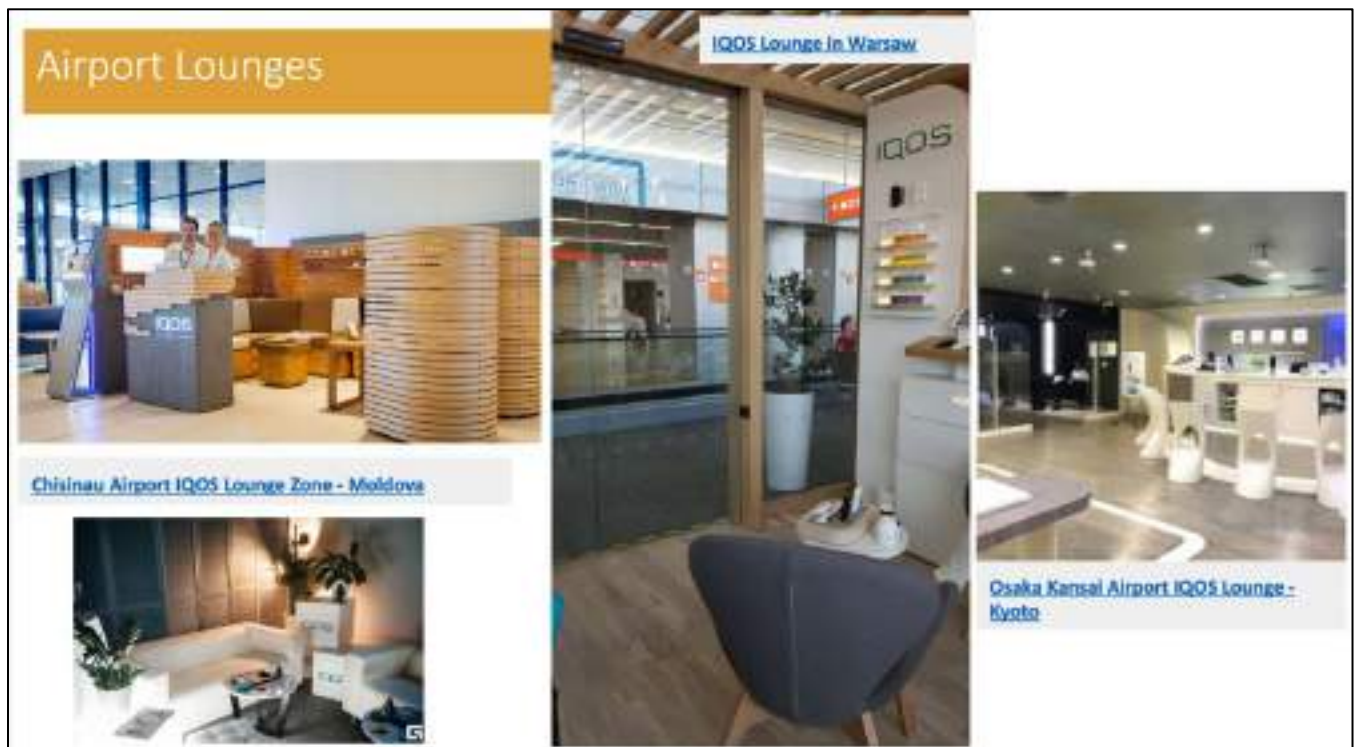
<https://www.grandvalira.com/en/iqos-terrace>

DJ Booth IQOS Andorra





<https://www.studiograssidesign.it/en/portfolio/iqos-lounge>

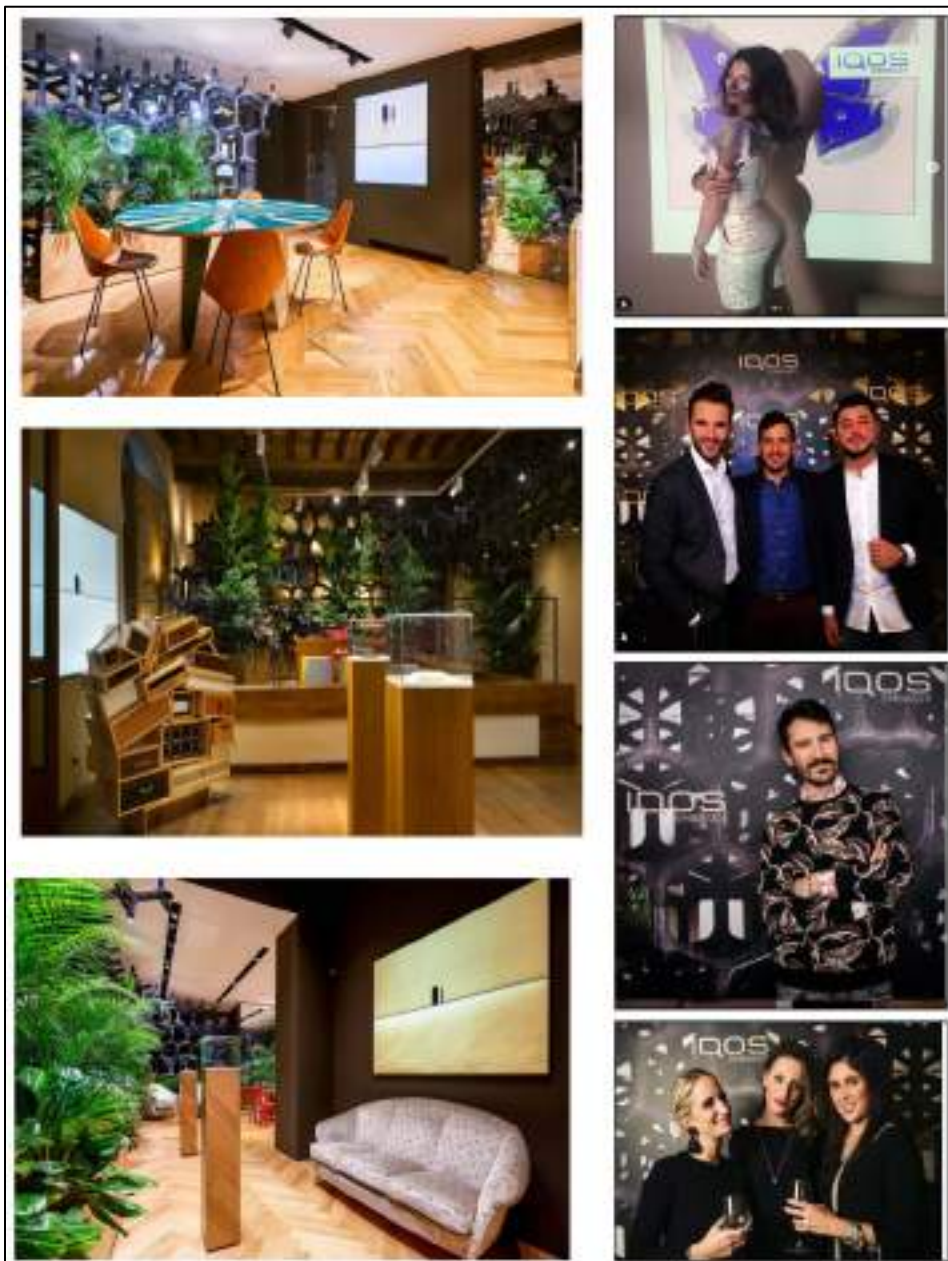


IQOS Embassies:

Description by Sartoria Communications. (<https://sartoria.com/work/iqos-embassies-launch/>)

“All Embassies are furnished with objects whose design is unusually innovative and ingenious, with pieces designed in the 20th century by internationally renown authors. The selection includes the great masters of Italian design, such as Ettore Sottsass, Vico Magistretti, Franco Albini, along with the best names of the contemporary scene. IQOS’s commitment to innovation and sustainability is as well reflected in the Embassies’ luscious greenery and the Tetrapod system, specially developed by Arthur Huang from recycled waste including IQOS HeatStick butts.” “December 2015 and April 2016 in Turin, Rome, Modena, Bologna and Mila IQOS Embassies have been cultural platforms that support the most innovative talents and places to experiment new solutions and push the boundaries of creativity.”

IQOS Embassies.



SECTION 8. IQOS EVENTS

IQOS events are parties, concerts, exhibitions, presentations, and store openings that Philip Morris International holds to cultivate loyalty, a sense of exclusivity, and public interest in the brand. Also in this category are PMI-sponsored events such as art and fashion shows, talks, concerts, and IQOS booths or spaces at larger events like festivals and fairs.

We were able to identify 270 events of varying type and size that start in August 2015 and continue all the way through events planned for August 2019. 1 took place in 2015, 30 in 2016, 67 in 2017, 50 in 2018, 120 so far in or planned for 2019, and 2 unknown. These events are concentrated in Russia (53) and Romania (61) but have taken place in at least 27 countries across four continents. We have posted videos from many IQOS events on our SRITA website: tobacco.stanford.edu/videos/iqos.

We organized the events into IQOS-hosted events (121) and IQOS-sponsored events (146). For 3 events, we are unable to categorize because we did not have sufficient information. IQOS-hosted events were those directly organized by the company or held in an IQOS store, whereas IQOS-sponsored events were those sponsored by IQOS and other companies or where IQOS had a presence like a booth or trailer at a larger event. Additionally, we categorized by type of events as follows in descending order of frequency: party/concert/performance (125), networking events (71), music festivals (29), art installations/show (16), store openings (7), food and wine festivals (7), film festivals (4), sports events (4), and other (7). For list of IQOS events, see supplemental table following the reference section.



The events radiate a sense of elegance and luxury. Many are invitation only, with celebrities and major influencers on the guest list, which contributes to a sense of exclusivity. These kinds of parties are likely to appeal to young adults, who may be attracted to the trendy party venues and private concerts with artists like Jamiroquai and Jason Derulo. A video of the April 2019 launch party at the Royal Court in Tirana, Albania, shows champagne served from behind velvet curtains by gloved hands, projections of famous paintings and the IQOS device, and an elaborate performance including an acrobat-violinist and a dancer using an IQOS device on stage. (Landmark Communications, Youtube 2019) The video also appears to show a guest sampling the IQOS and another receiving one in a bag. The devices are laid out on a display table for attendees to view. April 2019 events in South Africa boast “...four different drinking experiences including, a Gin foraging bar, Jet Chill Shooters, Liquid Nitrogen ice cream cocktail and cocktails in Spherical ice balls, that guests cracked open with hammers.” (Thirst Philip Morris, 2019)

This image is from the Albanian launch event in April 2019, marking the first time IQOS devices were available in that country. The event, for business partners and other guests of Philip Morris, featured video projections on all four walls; singing, dancing, live music, and acrobatics; and champagne served by gloved hands from behind velvet curtains, as well as tables showcasing IQOS devices. This image shows a performer in an elaborate costume using an IQOS on stage during a longer musical performance.



A video of the event can be seen here: <https://www.youtube.com/watch?v=KIBF8S0hxQY>

Youth oriented popular music is common in IQOS events.



The Czech Trinity Party from December 2018 was one of their most elaborate. Held in an “industrial palace” in Prague, the party opened with a dance and acrobatic performance in which ballet dancers revealed an IQOS device on a pedestal. Other performances included a brass band and drumline, rappers (during which the crowd chanted “We Will Rock You”), and live DJs and a light show. The gala served spring rolls (likely because they are “cooked without combustion”), ice cream cones, and cake pops, along with alcohol. The party is associated with the hashtag #IQOS3nity, which was seen on the branded DJ booth.



A video of the event can be seen here: <https://vimeo.com/322569674>

This is another photo of the Czech Trinity Party showing a band playing in front of a large cartoonish mural with the phrase “heat not burn” in large letters. While this is the best image of the mural available, the video of the event shows that the murals are extensive, covering huge amounts of wall space: <https://vimeo.com/322569674>.



<https://www.audiolightservice.cz/en/references/308-introduction-of-the-new-iqos-3/>

IQOS appears to have a standing relationship with Playboy; the Playboy Colombia magazine, for example, has written articles about the brand. Here, IQOS sponsored a Playboy party/awards ceremony in Germany, where bunnies can be seen in front of the IQOS logo and using the device. They also apparently gave out free devices to attendees.



<https://www.thomaspail.com/playboy-rockt-baden-baden-veronika-klimovits-ist-playmate-des-jahres/>

Playboy-IQOS website in Czech Republic.



<https://www.playboy.cz/tema/iqos>

Image from a photobooth at the Yerevan Wine Days festival in Armenia (March 2019). At the IQOS booth, attendees could choose from a variety of signs such as: "I smell the wine with IQOS," "Unsmoker & wine lover," and "wine fixes everything" Photos and videos of the event show young children in attendance.



<https://kamoblog.tv/blog/post/wineiqos>

MANIC MONDO 2.0. January 4, 2020: A showcase of the best of Malaysia's independent music scene.



“Unexpected You” IQOS 2019 event in Tokyo Ginza

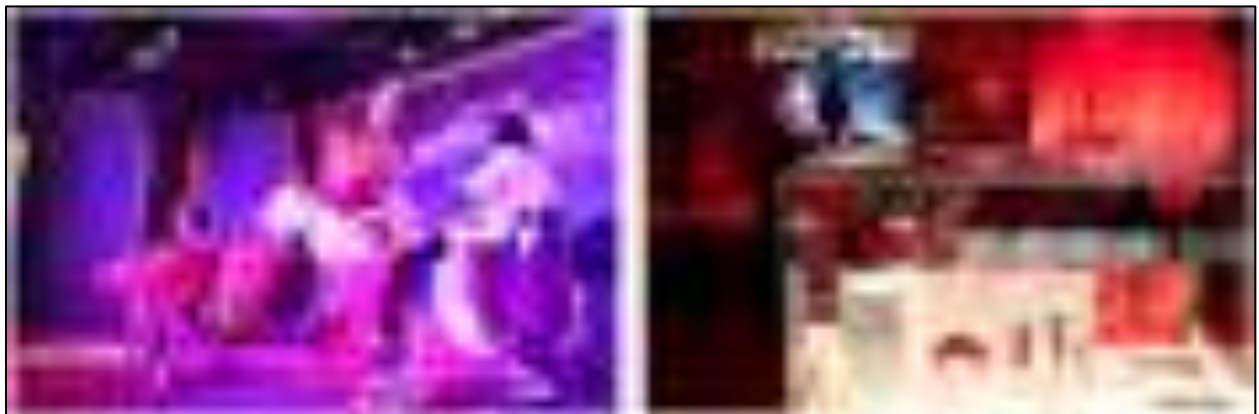


<https://www.picburn.com/p/2086288436339532071>

Influencers at IQOS Celebration night, Tokyo Ginza, April 19, 2019. The screen resembles the IQOS package insert.



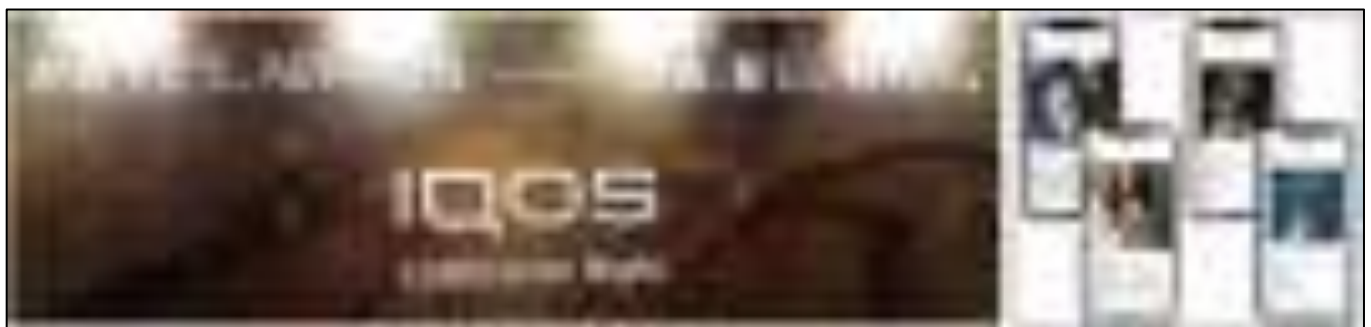
https://otakei.otakuma.net/archives/2019042206.html/iqos_celebrationnight_maindisplay



Influencers at IQOS Celebration night, Tokyo Ginza, April 9, 2019.



<https://www.ad-comm.com/portfolio/iqos>



IQOS Festival Estereo picnic Bogota, Colombia March 2017



<https://pbs.twimg.com/media/C7orTAKWkAluJH0.jpg>

Youth Oriented Events

In Romania, a group called The Brunch Affair hosted over 30 events for IQOS from February 2017 to July 2019, many of which were co-sponsored by alcohol companies and which had a more uninhibited feeling than the Albanian launch party. For example, the Facebook description for their November 2018 White Noise party read: *“Be aware! Heavy drinking and dancing may be involved! Add this to the feeling of nostalgia you may have in regards to this place and you have the recipe for #love! Love on the dance floor! The most dangerous one!”* (Facebook White Noise, 2018) The Brunch Affair events were open to anyone 18 and over who had a free membership card with the group. In addition to IQOS, the White Noise party was co-sponsored by alcohol brands Campari and Peroni and seltzer brand Schweppes.

Not all events attended by IQOS are parties. IQOS representatives have run booths at larger events like public park days and street food fairs in Russia. In 2017, IQOS sponsored a booth at Festival Estéreo Picnic, a huge music festival in Bogotá. After hearing a presentation about IQOS, attendees could go into a small booth lifted up by a crane and see the festival from above. (Enter.co, 2017) At the same time, musicians like The Weeknd, Glass Animals, Cage the Elephant, and Deadmau5 played, all of which are highly popular among youth. IQOS has maintained a presence at the festival, appearing again in 2019.

Besides open air festivals, many events are IQOS store openings, which are less formal but still lavishly catered with macarons, champagne, and sushi. For World No Tobacco Day in 2017, the Toronto IQOS store hosted an event in which *“smokers who are aiming to quit cigarettes were invited to trade in their last package of combustible cigarettes in exchange for an IQOS;”* almost 500 did so, receiving an essentially free device. (Snapd, 2017)

Although many of the events are limited to attendees above 18—the legal smoking age in most countries—some are more youth-oriented, open to youth under 18, and even intended for college students. Even those events that are appropriately age-restricted are often still youthfully themed, with trendy decorations and entertainment. Photos from the events unfailingly flood youth-oriented social

media sites like Instagram. One event celebrating the launch of the IQOS 3 and IQOS 3 Multi in Hamburg, Germany, featured Jason Derulo, an artist highly popular among youth.

IQOS was one of the main sponsors of the 2017 Cosmopolitan Summer Party in Russia, with a whole zone to themselves. These photos were taken in various photo-op areas at the party. These different areas - the “directions” sign, the Cosmo cover, and the trampoline - are all highly youth-oriented, emphasizing a carefree summer and trendy design. Importantly, the extensive IQOS branding in these spaces means that when these made-for-social-media images spread, IQOS’ name goes along with them, reaching an audience far beyond partygoers.



<https://geo.pro/reportage/466876-iqos-zone-cosmopolitan-summer-party/>

2019 Malaysian festivals - Youth oriented cartoon motif sponsored by IQOS DISQOVR.



The Summer Sonic Music Festival in Japan is an IQOS-sponsored concert series. In 2018, IQOS was a major sponsor; accordingly, the festival sported IQOS service and rental stations, where attendees could try IQOS devices and HeatSticks, along with smoke-free IQOS spots in place of cigarette smoking areas. These IQOS spots can be seen on the map of the festival above. Musicians in 2018 included highly youth-popular groups like Chance the Rapper, Shawn Mendes, Portugal. The Man, and Billie Eilish. The event is open to minors, and children are even encouraged to come along, as in 2018, the festival provided a “Kids Club” zone (directly to the right of Rainbow Stage) with circus performers and kid-focused DJs. The partnership will continue in 2019 and will continue to include “IQOS booth and trials spots” and “a free rental service for those who do not have IQOS” as well as an even more extensive Kids Club.



The 2018 map on this slide is from this page: <https://iqos-summersonic.jp/>.

Information about the 2018 Kids Club can be found here: <http://www.summersonic.com/2018/news/431/>.

Even more colorful maps from the 2019 festival can be seen here:

http://www.summersonic.com/2019/info/access_tokyo.html and

http://www.summersonic.com/2019/info/access_osaka.html.

Information about the 2019 sponsorship can be found here: <http://www.summersonic.com/2019/news/1023/>.

Information about the 2019 Kids Club can be found here: <http://www.summersonic.com/2019/attractions/kids/index.html>.

Events with youth presence

A sizeable minority of IQOS events are open to children. 38 of the 270 definitively allowed children, while 115 did not. For 117, it was unclear whether or not children were allowed. Many of the non-age-restricted events were those where IQOS had a sales booth at a family-friendly event, like a fair or festival. These festival-type events attract thousands of visitors, including children, and they subsequently cause large amounts of youth exposure to the IQOS brand. A few of the events open to children where IQOS had a presence include the Bocao Food Fest in the Dominican Republic and the ShortsUp Film Festival and Picnic in Romania. IQOS also holds many events at Shut-Up, Beach!, a beach and beachfront bar in Romania sponsored by the brand. Their sponsorship is evident from the brand elements, slogans, and colors that decorate the bar. Shut Up, Beach! is family-friendly; many photos from the location show children and families spending time there, and those children are likely exposed to a smoking environment as well as promotional materials from IQOS. Most of the IQOS events at Shut Up, Beach! seem to be over 18. However, one image from their Facebook page shows a child and family at a nighttime event.

The Summer Sonic Music Festival in Chiba and Osaka, Japan, is another IQOS-sponsored event open to and advertised for children. In 2018, IQOS was a major sponsor; accordingly, the festival sported IQOS service and rental stations - 7 spots where people are allowed to use their IQOS, 2 service stations, and 3 rental stations. At the rental stations, concert attendees could try IQOS devices and HeatSticks, and they could make use of smoke-free IQOS spots in place of cigarette smoking areas. (Summer Sonic, 2018) Musicians at Summer Sonic that year included highly youth-popular groups like Chance the Rapper, Shawn Mendes, Portugal. The Man, and Billie Eilish. Brightly colored maps of the festival show designated children's areas with circus performances and kids' DJs while also highlighting the IQOS stations. The festival is set to be much the same in 2019, with high-profile sponsorship, dedicated IQOS zones near child- and family-friendly areas, and youth-friendly musical groups.

Further, IQOS has attended at least one event intended for college students: Tel Aviv University's TLV Student Day Event. This May 2019 music festival, held on Tel Aviv University's campus, was co-hosted by a variety of Israeli universities and open to anyone above the age of 16 with identification. There, young, female IQOS employees staffed a pop-up tobacco store, which displayed IQOS devices and appeared to have allowed sampling. This event reveals that PMI has no issue with boldly marketing to youth under the age of their declared target consumers and at events with youth under the legal smoking age. Further, the event is strikingly similar to other big tobacco companies' techniques of hosting college parties and using college students as brand ambassadors to spread their products through college social networks.

In July 2019, IQOS had a booth at the Hannover Street Mag Show. Though it took place in Germany, this was an American car show, with prizes for the best of the 2500 mostly American cars there. Along with a vehicle presentation on the main stage, the event featured a *"Show'n'Shine competition, dragster, lowrider show, rock 'n' roll live music, sexy car wash, aftershow party and American food."* The event was explicitly family-focused, saying it was a *"Great children's paradise! The automotive cult event for the whole family;"* providing a bouncy house, face painting, and toy cars to ride on, and offering a discount for family tickets. (Street Magazine, 2019) Although this is not the only IQOS-related event to invite children, it is one of very few that is not focused on high-class living or fashion.

Young attendees at an IQOS press brunch with Alena Doletskaya former editor in chief of Vogue Russia. Ruski Restaurant on the 85th floor of the Moscow OKO building. 3/23/2017



https://geo.pro/reportage/450840-press-branch-iqos-s-alenoy-doletskoy/?sphrase_id=174677

The Tel Aviv University Student Day event is an annual music festival put on by the students of Tel Aviv University. The event has a clearly youthful audience of university students, and attendees as young as 16 are allowed entrance. This year, in 2019, IQOS had a booth at the event, where it appears they sold IQOS to the students in attendance. Attendance at an event like this connects IQOS with fun, music, and even teenage rebellion. When a company promotes itself at an event for those in their late teens and early 20s, it is clear they're not targeting middle aged smokers.



<https://vimeo.com/345660725>.

The Lollipop Affair is one of a series of 36 parties hosted by event planning organization The Brunch Affair between February 2017 and August 2019. These parties are almost always sponsored by other companies along with IQOS; in this case, Campari, Schweppes, and Miller were also sponsors. Each party has a theme, like “Let’s Play Outside,” “Endless Summer,” and “Girls Do It Better.” In this case, the theme was candy, as seen in the invitation image on the left, so guests were served lollipops and the outdoor event space was decorated with streamers of larger-than-life hard candies. Brunch Affair events are open to adults who have a free membership card to the organization. However, as the smoking age in Romania is 18, there are very young attendees like those in the right hand image.



<https://www.facebook.com/events/458324838064638/>.

<https://www.facebook.com/1535683496722572/photos/gm.458324954731293/2141120612845521/?type=3&theater>

https://www.facebook.com/The-Brunch-Affair1535683496722572/photos/?tab=album&album_id=2160868164204099.

IQOS event at the Bono Beach club in Odessa, Russia. The Instagram accounts of both young women contain several IQOS posts suggesting that they may be brand ambassadors.



<https://www.instagram.com/p/Bk6UraJAe2Y/>

<https://www.instagram.com/p/Bk7PjUqnEaM/>

IQOS's presence at the Hannover Street Mag Festival. The festival, an American car show in Germany, featured more than 2500 cars, live music, a lowrider show, and American food, among other attractions. The event was explicitly family-focused, with a bouncy house, face painting, and toy cars for children to drive, along with family ticket deals. The style of the festival is very distinct from the infinitely sleeker IQOS parties and music festivals; it is unclear what target audience PMI sought at an event like this. It also raises the question of how many other smaller scale local events IQOS has a presence at.



A longer video of the event is available here: <https://www.youtube.com/watch?v=b28Pvh29IEM>

DISQOVR

Music and Dance Events:

DISQOVR is a PMI program promoting IQOS which we identified in Malaysia and South Korea which primarily sponsors rock music events, attended predominantly by youthful audiences. At these events IQOS is demonstrated and samples are provided. The name DISQOVR contains the characteristic tobacco leaf shaped letter "Q" which permeates IQOS marketing.



The name of PMI's DISQOVR promotional events closely resembles "Discover", a contraction of the word discover, which is the name of a number of entities including a popular Apple iOS music app, a consortium of national labs, a biofuels group, and also companies selling speakers, immersive learning

technology, etc. PMI's DISQOVR marketing program for IQOS, which emphasizes music events, appears to be a derivative of the Discover music app with the "c" replaced by a tobacco leaf shaped "Q."

Many of PMI's DISQOVR events are well documented on Instagram and Facebook. Posts on DISQOVR Instagram hashtags as of January 9, 2020 include: #disqovr (1986), #disqovrmusic (1203), #disqovroriginalmusic (35), and #disqovrspokenword (36). The earliest DISQOVR we encountered was held in late February 2019 in Malaysia a few months after IQOS first appear on the local market in November 2018.

Many events were held in a trendy event venue called The Gasket Alley, which describes itself as: *"the best of Malaysian self-expression, creativity, and zest for life"* and *"A promising lifestyle hub."* (<https://thegasketalley.com/about/>). In April 2019, "DISQOVR X Musika" saw IQOS partner with a record label to hold a Record Store Day sale in a music store at The Gasket Alley. While it was only for those over 18, the event capitalized on the vinyl revival popular among young people and featured live performances and DJ sets. IQOS branding was prevalent; a sign told guests to enter the event *"to DISQOVR the true taste of music,"* and a decorative display paired fake cymbals and guitars with real IQOS devices and cases. Around the sales and performance space were posters of famous album art, like that from Joy Division and Pink Floyd, edited to carry the DISQOVR name. As part of the sale, the Musika label released a *"DISQOVR X Musika"* record series in which they released exclusive cassettes from five local bands sold only at the event.

Manic Mondo was a highly publicized DISQOVR event, also held at The Gasket Alley in May 2019 and likely named for the teeny Bangles song "Manic Monday." It was primarily organized by the Hikari Riders, a fashion brand that *"sells love for custom motorcycles, music and local brands."* The founder of Hikari Riders, Noh Salleh, is a famous singer and musician with 369,000 followers on his main Instagram account, where he has promoted Manic Mondo and other Disqovr events and used Disqovr hashtags. More recently, his main account posted an image that included an IQOS display. (The smaller Hikari Riders account, still with a sizeable 21,600 followers, posted a video that includes IQOS product shots and repeatedly shows Salleh using the device on May 11, 2019, right as the influencer ban was coming into effect.) The event itself included live performances by five bands with rowdy crowds, street food, screenprinting, and a release of new Hikari Riders apparel, along with areas where it appears one could buy or at least view IQOS.

From DISQOVR event at Malaysia's The Gasket Alley's Manic Mondo featuring the band Hikari Riders, January 2020: note the youthful character of the attendees.



The April 2019 “DISQOVR X Musika” record series with exclusive cassettes from five local bands sold only at the event was reserved for those 18+. The May 2019 DISQOVR branded Manic Mondo was: “kids friendly and Free Entry for anyone.”



Note that Gasket Alley event space, locus of DISQOVR events, appears to host an IQOS store.



On July 13, 2019 at Capital City Mall in Johor Bahru, Malaysia, DISQOVR hosted Southern Indie Night featuring rock bands.



More photos can be seen on Facebook

https://www.facebook.com/media/set/?set=ms.c.eJxFtkNBDEMqJta~_T76b2w1ZML8lvOMScxatyakzEPTfwahdjary~_YVOvwRcpXC2oqs5iuMNBhTdyLtESz0CpMQhNDxhzHdI2EGwYc5EMyFwaYRzPcyBJZNQkWPwAnFlo27pX0gmF3BBsHq3tLdyMFrR2GZoEURzOZrTABtuZZehVEMZoUJD24xdJrB8wMV1hc9TvTixIEuoYvoynyG7LOWDFtsWZZcaKzJmDjQJjRx~%3Bsp3voLBx~_48jTmFASP5ciOIPsnv0ArL1~%3BriBw1bHz8Wo6WOsPUHPOiK2Q~-.bps.a.2271966429567684&type=1&__tn__=HH-R

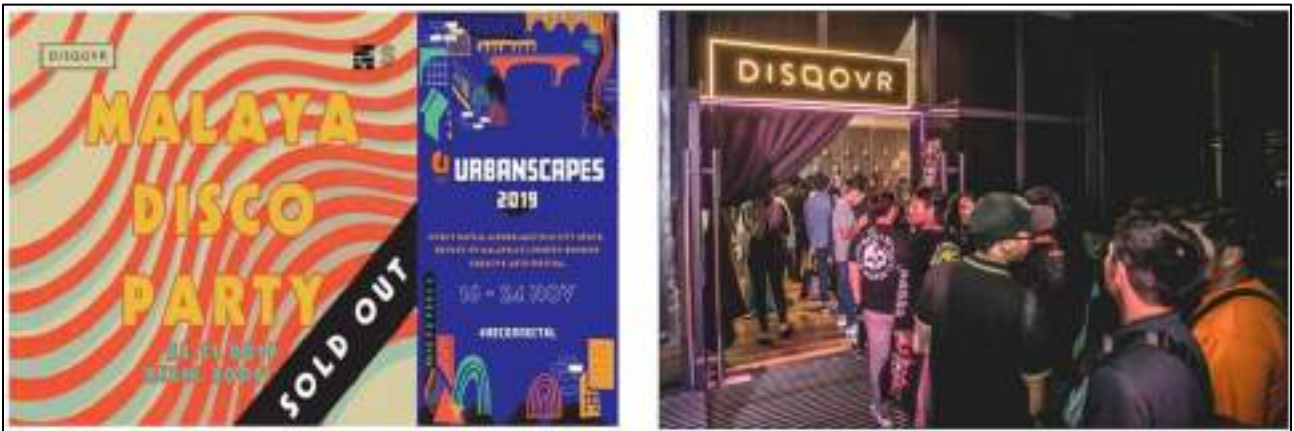
DISQOVR sponsored Tapau Fest celebration of indie culture in Malaysia (October 2019). Note that the partnership statement placed by PMI does not mention that it is promoting a tobacco product.



<https://www.tapaufest.my/partners>

In November 2019, DISQOVR hosted a Malaya Disco Party described: *“The idea is to push the disco agenda; a genre forgotten by many young listeners who can only identify disco by the usual common suspects: Abba, Bee Gees, Earth Wind & Fire and many other cheesy groups; and wow them by making them think.”*

DISQOVR Malaya Disco Party in Malaysia (November 2019).



<https://www.facebook.com/events/rexkl/disqovr-presents-creativelabs-malaya-disco-party/1390015174507268/>

Additional DISQOVR concerts by LUST in South Korea (September 2019), while in Malaysia concerts by Airliftz and Astro Bunny, a Chinese rock group, were held in August 2019 and January 2020.



Automotive Events:

On June 22, 2019, DISQOVR sponsored the Speed Junkies Drift Showdown, held at the Elite Plus Speedway in Subang Jaya, Malaysia. This event was an automotive race that was family friendly, as children can be seen in images of the event. At the race, DISQOVR had a large tent; inside was a DISQOVR-branded car with the quote *"imagine all the people living life in peace"* on the side, Daytona USA racing video games, a cold brew food truck, and stands where it appears attendees could buy IQOS. Additionally, the DISQOVR name was prominent on promotional signage and on some of the racing cars. There was even a Marlboro car at the event, although DISQOVR and Marlboro weren't connected in a noticeable way beyond their shared ownership through PMI.

DISQOVR promotion at auto races.



DISQOVR Lounge at a retro car show Retro Havoc at the Sunway Depot in Malaysia (March 30, 2019).



Two days after the Speed Junkies drift event, on June 24, one of the racecar drivers, Tengku Djan Ley, posted a photo of the IQOS 3 Multi and a pack of HEETS, writing that *"Its [sic] the perfect heated tobacco system for smokers who are looking for a cigarette alternative"* and encouraging his 38,700 followers to "Give it a try!" Ley had also promoted the event itself a day before it occurred.

Race car driver Tengku Djan Ley promoting the race and IQOS.



<https://www.instagram.com/p/By9I3-TgLa7/>



<https://www.instagram.com/p/BzF2Uqkg7Eu/>

Along with these posts and the promotional ones from Noh Salleh, there have been several influencer-like posts related to DISQOVR. Prior to the influencer ban, there were multiple posts by likely influencers from the clothing brand OVATION's pop-up store sponsored by DISQOVR. Additionally, members of bands sponsored by IQOS have posted images that are highly reminiscent of influencer posts. Irfan Iskandar, member of the band Toko Kilat, has posted promotional photos multiple times after the influencer ban, including photos of Toko Kilat-branded IQOS devices and pictures of himself in front of the IQOS store and holding one of the devices. His bandmate, Edwin Raj, also posted an image of an IQOS device and a box of HEETS on August 1, 2019, and the main Toko Kilat account posted a branded IQOS on August 7. While it is unclear if these accounts are paid directly for their Instagram posts, their band's sponsorship by the company makes it hard to divorce their posts from the compensation they receive for touring.

Cultural Events:

DISQOVR Sponsored art festival in Malaysia November 16-24, 2019. Urbanscapes is Malaysia's longest running creative arts festival.



*Sketch of DISQOVR at the
Urbanscapes PMI sponsored art event*



*Fortune telling at the Tiffin Food Court
DISQOVR August 2019*



Food and Beverages

PMI's DISQOVR promotional program for IQOS also features food and beverages. These have their own Instagram hashtag: #disqovrtaste with 111 posts as of January 10, 2020. The marketing message of the DISQOVR palm reading is that IQOS is in your future.

Branded food and beverages at the DISQOVR Lounge at the Tiffin Food Court in Malaysia.



<https://m.facebook.com/tiffinevent/>

SECTION 9. IQOS BRAND EXTENSIONS

IQOS uses brand extensions, or items that carry the IQOS name but are not the device itself, to expand its marketing reach outside of tobacco and associate its devices with fashion, art, and status. Its most extensive program, the “*Qollection*,” is a fashion line run through the IQOS “*Qreator Space*” in Romania. New clothing and accessories from this program are released every one or two months, and they vary from refined and elegant to brightly colored and patently youthful. Another Romanian program partners with artists to make high end items, like leather automotive gloves and streetwear sweatshirts patterned with a smoky iQOS design, which are then promoted on Instagram. In both of these programs, iQOS stresses its “*support for creators*,” making its art-based advertising seem altruistic while targeting fashion-minded young people. Another standout Romanian extension is its hummingbird-patterned heels. Promoted on social media with the hashtag #iqosonheels, the shoes were a gift to VIPs in the IQOS rewards program, making them an exclusive and desirable status symbol.

These chocolates are still being served, apparently - an Instagram post from 8/9/2019 shows someone having them in an IQOSignature Cafe in Japan.



These heels appear to have been gifts to higher ups in the actual PMI company and/or in the IQOS Club rewards system - it's a little unclear. However, they were definitely meant as a status symbol.

#iqosonheels: IQOS heels designed by Romanian shoe designer Mihaela Glavan - July 2017



From the Qreator space in Romania, which has a full line of clothes and accessories. This is one of the sleeker, slightly less youthful items in the “Qollection,” although it’s still sleek and fashionable. Note the emphasis on the letter ‘Q.’



<https://translate.google.com/translate?sl=auto&tl=en&u=https%3A%2F%2Fwww.qreator.ro%2Fqollection%2Fqollection-summer-edition-pentru-o-vara-plina-de-culoare>



From the Qreator space in Romania, which has a full line of clothes and accessories. This is one of the more youth-oriented projects from the “Qollection,” showing bright colors and a man in a Super Mario t-shirt.



<https://www.qreator.ro/qollection/qollection-summer-edition-pentru-o-vara-plina-de-culoare>



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An artistic endeavor by Contoli may, or may not, have been sponsored by the company. .



<https://www.susannacontoli.com/iqos-perfume>

We have a number of Qreator videos on our SRITA website: tobacco.stanford.edu/videos/iqos.

SECTION 10. IQOS SPONSORSHIPS AND PARTNERSHIPS

Along with collaborating with artists, IQOS has sponsored several art and fashion shows that help associate the brand with high culture and generate publicity for the brand even among those who might not otherwise have heard of IQOS, including non-smokers and young people. IQOS collaborations often support “promising young (over 18) designers, favoring the exchange between innovation and creativity.” (ref Vogue)

This is a more recent collaboration with the brand Antifashion, which according to their website specializes in bags for music festivals. IQOS covers made by architect and designer Karim Rashid for Mercedes Benz fashion week in Milan. “IQOS will present a limited collection of kidney bags at the Pohoda Festival in cooperation with one of the most prestigious Slovak fashion designers Fero Mikloško, A very exclusive, yet affordable and up-to-date kidney bag carries the designer's handwriting while also being practical to use with IQOS and having a great wear comfort.”



Romania, 07/23/2019



Czech Republic, 07/12/2019

<https://www.antifashion.ro>, <https://www.instagram.com/p/B0QNod3BZAY/>

<https://sk.iqos.com/en/iqos-na-pohode>



<http://www.fashionrepublik.com/weekend-five-karim-rashid-iqos-cases-hotels-lollipops/>

A fashion show sponsored by IQOS, which had a booth at the event. As can be seen in the photo, children took part in the show. Two of the models in the Polish fashion show have over 100k followers on Instagram.



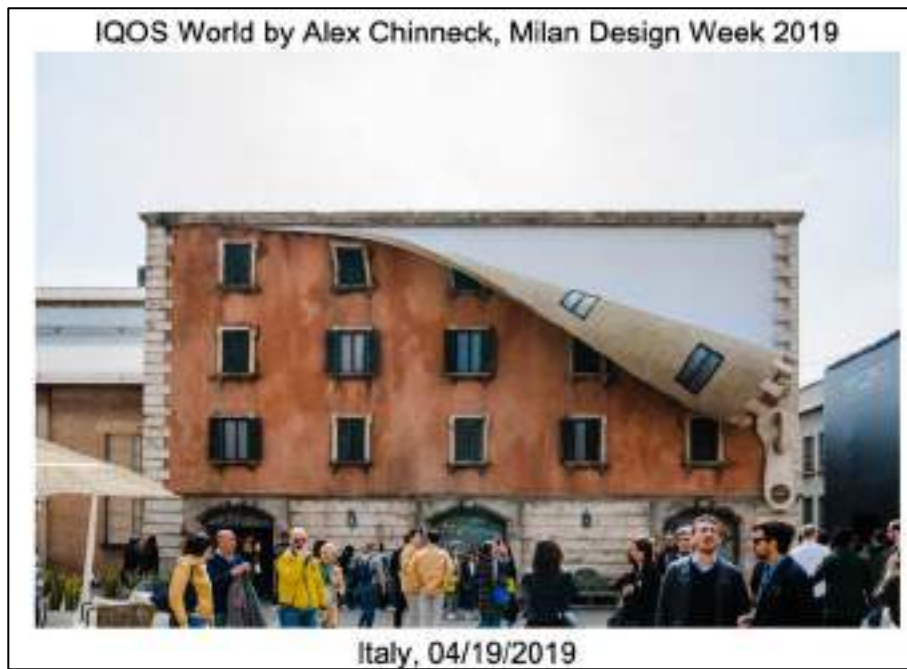
<https://goeventos.es/we-love-flamenco-viva-desfiles-casino-exposicion-sevilla/>



Left: https://www.facebook.com/pg/TOMAOTOMO/posts/?ref=page_internal

Right: <http://www.shemag.pl/trend/tomaotomo/>

An art project commissioned by IQOS for Milan Design Week.



<https://rhiannamay.com/2019/04/milan-design-week-2019-rast-los-geloest>

Invitation to apply for a 1 minute idea that's meant to inspire metamorphosis a TED X in Bucharest, Romania November 1-15, 2019. The theme is aligned with IQOS marketing emphasis upon change.



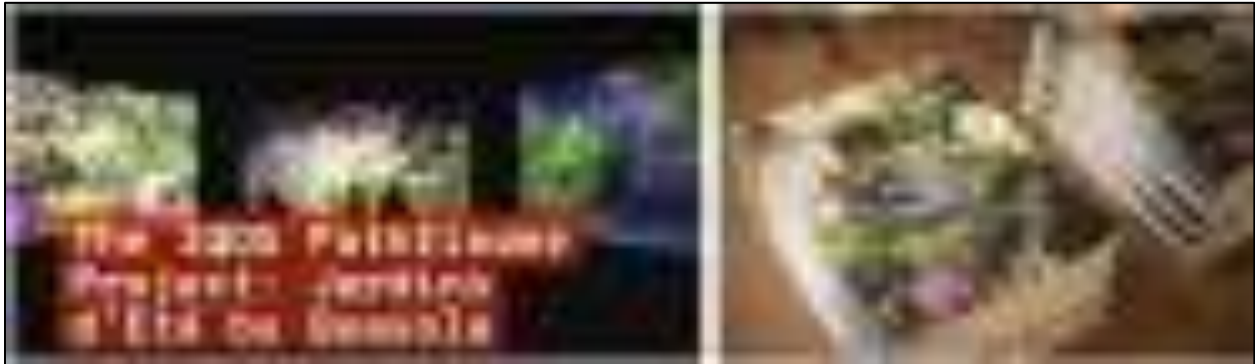
<https://tedxbucharest.ro/qreatemetamorphosis-special-campaign-for-all-tedsters-is-on/>

IQOS Pathfinder Project

IQOS Pathfinder Project is described by PMI in thoroughly overblow rhetoric. In one installation, it is described as: *“an international cultural platform, dedicated to the promotion of the most innovative creative talents: artists, musicians, designers, architects, filmmakers, united by the desire to experiment in terms of languages, of codes, of style.”* (ref Artribune) In another description, PMI calls the IQOS Pathfinder Project as: *“a global cultural platform that supports the most innovative creative talents, in pursuit of new ways of thinking, feeling, hearing, tasting and seeing. The IQOS Pathfinder Project*

supports projects that reveal a particular way of living in the world without preconceived notions, triggering positive change. While the past cannot be changed, the future can be redesigned through creativity and innovation.”(ref. Jardins d’Été). Description by PMI in yet another project: “Culture drives change: the projects presented for IQOS reveal the common strength in going beyond the boundaries of traditional thinking, changing the most classic ways of thinking and seeing the world. The imaginative use of technology helps deepen our sensory perceptions and make us think differently about what we thought to be unchanging, if not impossible.” (ref. Panter & Tourron)

Jardins d’Été by the artist Quayola is an immersive video installation: a series of digital video paintings in ultra-high-definition inspired by French Impressionism and the later works of Claude Monet.



https://www.internimagazine.com/last_news/news_agenda/the-iqos-pathfinder-project-jardins-dete-by-quayola/

NIGO is a famous Japanese streetwear designer who has collaborated several times with IQOS. On the left is the Purity Collection, a set of accessories in a style influenced by traditional Japanese art. On the right is a more high profile collaboration called the Camo Collection of camo print IQOS devices, which seems to have been heavily promoted at IQOS stores. The design features tobacco leaves hidden among the other patches of color and seems like a way for the brand to target men, judging from their ads for the campaign.



Purity collection: <https://hypebeast.com/2017/10/nigo-iqos-vape-pathfinder-project>

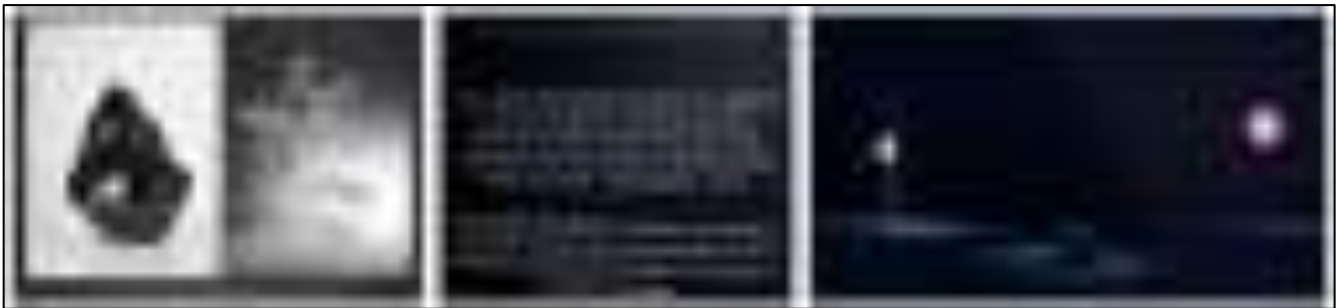
Camo collection: <https://hypebeast.com/2018/4/nigo-iqos-camouflage-vaporizer>

IQOS Pathfinder Project: Nigo is a Japanese “fashion designer, DJ, record producer, and entrepreneur.”



<https://garigari-studio.com/iqos-nigo>

Two IQOS Pathfinder Project installations symbolizing divergence (left) and heat (right).



<https://www.tribune.com/progettazione/design/2017/04/milano-artribune-salone-del-mobile-arte-design-the-iqos-pathfinder-project/>
<https://www.lsglobal.com/news/article/21133/milan-salone-2017-thermal-transitions>

Art partnerships and brand extensions

A major part of IQOS branding is presenting itself as the cutting edge of art and fashion. Accordingly, IQOS has partnered with and funded artists in various ways. Most prominently might be the Qreator Space in Romania, which provides studio and event space for artists and musicians, along with the “*Qollection*” fashion line. The brand has also worked outside of the Qreator Space to make physical products both for their VIPs and general IQOS users, and it has funded a wide range of artists and art shows. From our count, IQOS has created 21 brand extensions and has sponsored artists without creating a commercial item 18 times. The very earliest of these occurred in 2016, and the most recent was in July 2019.

In April and May of 2019, IQOS partnered with three different artists to create limited edition accessories for IQOS users. IQOS partnered with automotive photographer Ervin Boer to make leather driving gloves; bridal couture store Katerini Mou to make flowy, leaf-shaped earrings; and street fashion brand Blana to make a special sweatshirt, which featured the Blana logo and a pattern showing IQOS users and smoke. (ref Boer, 2019; Katerini, 2019; Blana, 2019) Each was available at one IQOS store for about a month and was promoted on the Instagram pages of each artist with post captions reading “*IQOS supports creative communities and gives a voice to talented artists by creating unique collections inspired by the IQOS universe, exclusively for you.*” Each also had a promotional video, which for Blana involved young IQOS employees in Blana sweatshirts running around with pool toys and a rainbow kite (ref Blana, 2019).

Even more recently, in July 2019, IQOS partnered with the handbag company Antifashion to make three brightly colored bags available in IQOS stores. (Ciulea, 2019) These bags are branded with both the Antifashion and IQOS logos. Antifashion as a brand is heavily aligned with festivals; its website boasts that it is the “*world’s backpack of choice for: music festival [sic], university, school, work/corporation*” and says to “*enjoy the festival with #antifashion.*” There’s even a gallery of festival photos featuring Antifashion bags. (Antifashion.ro) This cements IQOS’ own association with festivals, having sponsored many, and aligns the brand with an aesthetic that’s more spunky and youthful than the sleek and sparing designs seen in other countries.

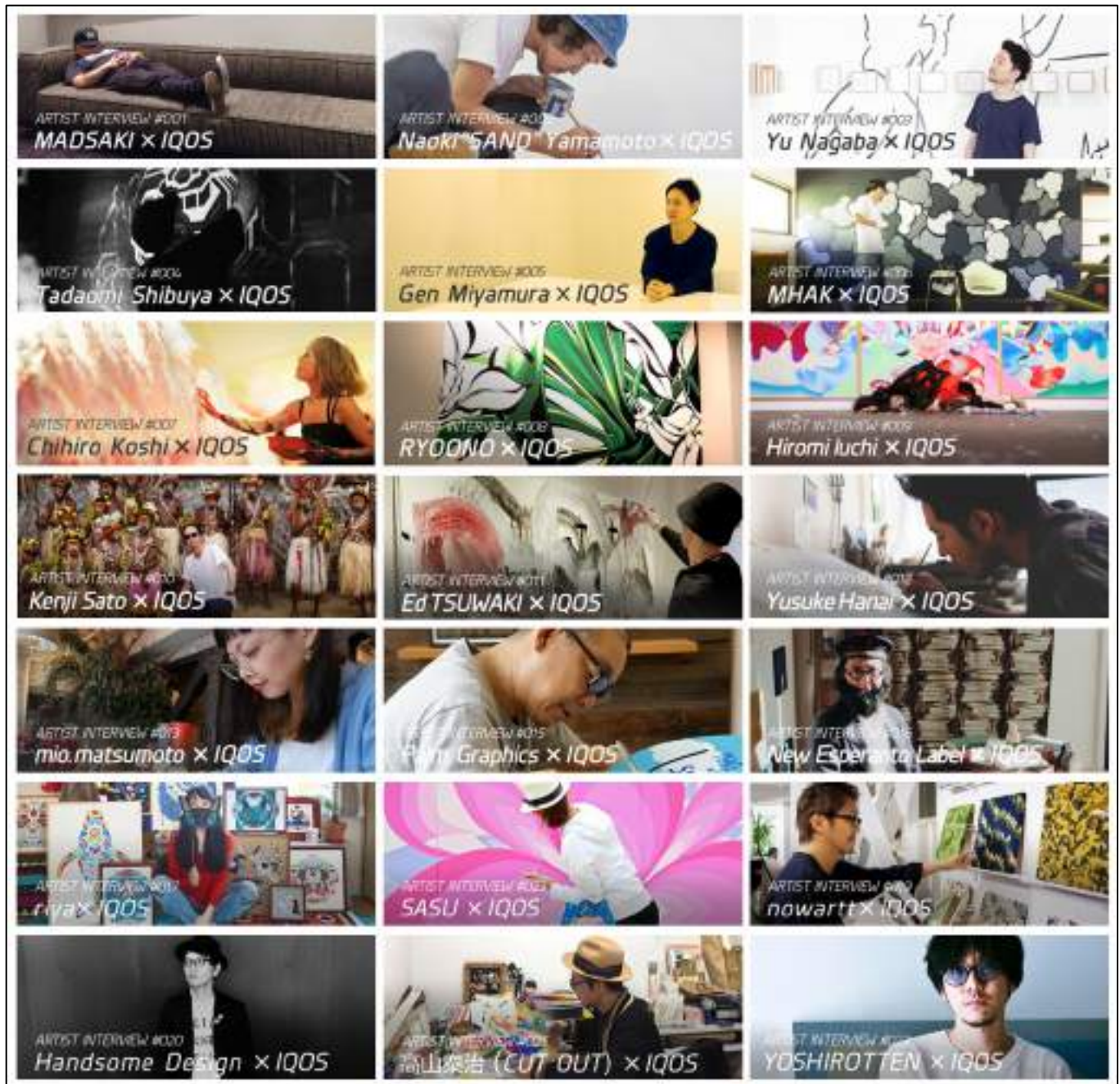
IQOS has sponsored additional brand extensions in which fashion items are explicitly IQOS-branded. For example, they partnered with Miklosko Fashion Design to produce an IQOS x Miklosko bag along with a Moschino-like belt for the Slovak Pohoda music festival. (Bacikova, 2019) They also partnered with Romanian shoe designer Mihaela Glavan to create turquoise heels. The shoes featured an IQOS hummingbird design on the back of each heel and were distributed to VIPs and high-ranking club members with the accompanying hashtag #iqosonheels as a way of creating an exclusive and desirable reward. (IQOS on Heels, 2017)

The “*Qreator Space*,” along with offering physical space for artists, runs an extensive brand extension campaign called “*Qollection*” with the tagline “*collection pieces for a unique style.*” Roughly every two months, the Qreator Space partners with a different artist to create exclusive and Qreator Space-branded fashion items. For example, in June 2019, Qreator partnered with Maria Palaria to create an exclusive hat in three different colors, and in February 2019, Laura Olaru made Q-shaped bags for the space. Just like the in-store brand partnerships, the Qollection items are accompanied by promotional videos. A recent extension called the Summer Collection is highly youth-oriented, using colorful patterns and including items like an external phone battery. (ref Qollection, 2019) Additionally, the promotions for the collection are very youthful: a video advertisement shows a man in a Super Mario shirt with a Qollection bag, and he and his friends load up into a van to take a summery outdoors trip. (ref Philip Morris International, 2019)

Five of IQOS known partnerships involve specially designed cases for the IQOS device. These have included the NIGO Camouflage Collection, one of three IQOS collaborations with the famed streetwear designer, as well as the 2017 Master Style Collection, a collaboration run through and advertised in Vogue Italy. (Dike, 2018; Vogue Italy, 2017) Both of these case sets advertise to and attract audiences who aren’t necessarily IQOS users or smokers: the youth-skewed streetwear fanbase and Vogue readers.

Along with collaborating with artists to make a salable item, IQOS has sponsored a number of art and fashion shows. For example, IQOS was a sponsor of Spanish artist Okuda San Miguel at the Urvanity Contemporary Art Fair in 2019 and commissioned Lithuanian artist Agne Kisonaite to create a “Mirror Lips” sculpture made out of colorful IQOS caps. (ref Urvanity, 2019; Kisonaite) (The Urvanity Instagram account used #IQOS in a post promoting the event, which garnered 1,637 likes from its 21,500 followers as of 08/21/19. [Urvanity Art, 2019]) IQOS also has an affinity for fashion shows, sponsoring the Polish Tomaotomo “LaDorothee” and Armenian Petoor collection fashion shows in 2018 and 2019 respectively. (ref Mar, 2018; Tovmasyan, 2019) While these events do not create products that IQOS can then sell, it is able to attach its name to them, associating the device with high culture and generating publicity among those who might not otherwise hear of IQOS, including non-smokers and young people.

Japanese artists commissioned to produce design concepts for IQOS cases.



IQOS Vogue Master Style (September 2017). Another example of PMI commissioning artists to design decorative IQOS cases for sale in IQOS retail locations.



<https://www.vogue.it/en/vogue-talents/contest-opportunities/2017/09/08/iqos-master-style-philip-morris-call-for-action-finalists/>
<https://www.vogue.it/en/vogue-talents/contest-opportunities/2017/06/08/iqos-master-style-philip-morris-vogue-talents-call-for-action/>

The goal of the project was to create limited edition accessories line for IQOS. The five winning designs were sold at IQOS Embassy stores in Milan, Rome, Turin, Bologna, and in the IQOS Boutiques across Italy. Among those on the judging panel were Vogue Italia's Editor-in-Chief Emanuele Farneti; Vogue Italia Deputy Editor-in-Chief, Head of Vogue Talents Sara Sozzani Maino, Vogue Deputy Editor-in-Chief Alan Prada; and a representative of Philip Morris Italia.



<https://www.vanityfair.it/fashion/news-fashion/2017/10/27/iqos-master-style-vincitori>

IQOS CELEBRATE Art for Life Tenku Museum, Tokyo. July 01, 2017. “Ad-comm was brought on board to help launch the brand, creating and optimizing the brand’s appeal in Japan through an art and design centric lifestyle positioning element, and innovative digital augmentation activities.” “Local artists, all trendsetters, were selected and engaged to design a signature IQOS device sleeve accessory and inject their vision and appeal into the brand. A series of “art sleeves” were successfully launched, establishing IQOS’ presence in the realm of art, design creativity and innovation.”



<https://www.ad-comm.com/portfolio/iqos/>

Original art work adjacent to themed IQOS covers



<https://instagrammernews.com/detail/1548946548503058504>

<https://instagrammernews.com/detail/1549238266547718534>

An IQOS sponsored exhibit by Spanish artist Okuda San Miguel during URVANITY, a Spanish Fair in Madrid dedicated to new contemporary art. (Feb-March 2019)



<https://urvanity-art.com/proyecto-especial-okuda-by-iqos/?lang=en>

Composition in the IQOS Co-Working space in Madrid by Anna Taratiel is a Spanish artist – note the stylized IQOS cases in the picture frame and on the tabletop.



https://urvanityprojects.com/en/projects/iqos-co_lab-cafe/

Artist Miss Van sponsored by IQOS



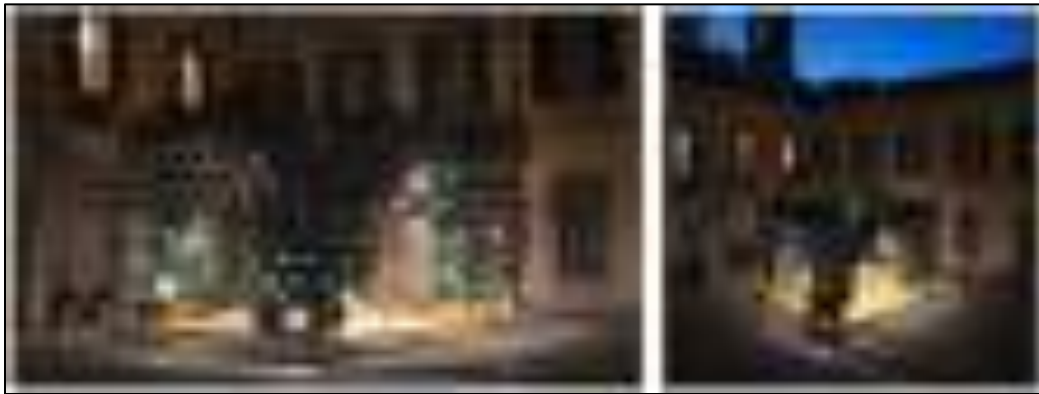
<https://urvanity-art.com/solo-shows-by-iqos/?lang=en>

Created by artist Agne Kisonaite for the opening of the largest IQOS store in Lithuania, this lip shaped work of contemporary art was fashioned out to 2400 IQOS colored caps.



<https://agneart.com/portfolio/contemporary-art-object-mirror-lips/>

IQOS commission a sculpture named “Anything Butts” which may be intended to convey the opposite meaning “anything but bitts.” Designed by Miniwiz, “an engineering and manufacturing company whose mission is to transform waste into extraordinary and high performance materials.” After Milan, the was also exhibited in the iQOS Embassies of Rome, Turin, Milan, Bologna and Modena.



<https://sartoria.com/work/anything-butts/>

Photographer Antoine Le Grand was commissioned by PMI to create a gallery of still life compositions of IQOS products for its display in its IQOS Embassies in Rome and Turin.



<https://panottica.com/project/antoine-le-grand-x-iqos/>

“Colours of Malaysia” described as personal composition so the Malaysian flag reproduced on IQOS boxes.



<https://www.nawwarshukriahali.com/projects/iqos-x-bono-stellar>

Sensual Body Art IQOS event in Bulgaria.



<https://m.facebook.com/133225803378016/posts/iqos-bulgaria-body-art-mishel-valcheva-assistant-gergana-mitevamishel-mishelart-/1754114304622483/>

Undoubtedly many cultural events and art festivals have been offered sponsorship funding by PMI on behalf of IQOS but have declined to participate. One well documented case was the August 2019 New Zealand Fashion Week. (Refs. Slade, Sweetbro)

Sports partnerships

Motorsports

Philip Morris International has been a sponsor of Scuderia Ferrari in Formula 1 since 1984 and Ducati in MotoGP racing since 2003. After the ban of tobacco advertising in F1 racing in 2006, PMI has resorted to rule-bending tactics to evade the ban and promote their products. Before the launch of IQOS, this subliminal advertising took the form of a barcode design on Ferrari car liveries and racer outfits, which was designed to remind viewers of the Marlboro logo. Taking a page out of their own book, in 2018, PMI announced that a PMI-created initiative called “*Mission Winnow*” would be used on Ferrari liveries (as well as the liveries of Ducati in MotoGP racing). Branded as a global initiative “*to create a better future through science and innovation*,” Mission Winnow is actually a proxy used by PMI to remind F1 spectators of the IQOS smoke-free mission and advertise tobacco through more subliminal means.

Although PMI does not explicitly advertise IQOS when they talk about Mission Winnow, they have in the past used IQOS branding in their VIP lounges at F1 and MotoGP events. Invited members get perks at races, such as exclusive invites to preferential seating areas sponsored by PMI. In 2015 and 2017, VIP guests at the Monaco Grand Prix received Ferrari-branded IQOS devices and cases, though it is unclear if these were given as gifts or bought by attendees. At the 2017 and 2018 Japanese Grands Prix, VIP members were invited to an IQOS Lounge, where they could hear Ferrari drivers speak. These events were heavily branded with IQOS signs and included employees selling IQOS.

At the 2018 Monaco Grand Prix, IQOS had a strong presence due to a large group of young women who worked as promotional staff hired through the Exhibition Girls agency. IQOS hired women to advertise their product and accompanied their guests on “*the largest cruise ship at Monaco Hercules port*.” In the same year, IQOS also released a limited motor edition that was incredibly difficult to purchase. Although there was no explicit connection between the IQOS motor edition and F1 racing and motorsports, it targeted a similar audience and was branded to be an exclusive and luxurious version of IQOS, being priced around 300 euros.





Philip Morris Ignites Formula 1 Ferrari Habit With IQOS

All: ANDERSON / FEBRUARY 27, 2018 / NEWS & MEDIA

2020 Tokyo Olympics

While motorsports seem to be the sport with the greatest IQOS presence, the Olympics have also become a point of controversy for the brand. Due to the adverse health effects of smoking and second-hand smoking, the 2020 Olympics in Tokyo are set to ban smoking; however, as of January 2020, this ban does not include IQOS, other heated tobacco devices, or medical vaping. Currently, PMI claims that IQOS has no second-hand smoke, thereby working around the smoking ban.

Clearly, PMI is angling to offer IQOS at the 2020 Olympic Games. In October 2018, PMI CEO Andre Karanapolus was quoted as saying: *"At least during the Tokyo Olympics, we should and should be able to achieve zero cigarettes. In a few years, I think Japan will be the first country in which the majority of cigarette users will transition to heated tobacco."* (ref. Nishiyama)

Tinder

In a talk given to an audience of Philip Morris Kazakhstan employees sometime in 2019, senior VP for Communications for PMI Marian Salzman made reference to an upcoming partnership with the dating and hookup app Tinder. (ref Vimeo Salzman) According to Salzman, the company is in the process of creating a global campaign with the app in which users can mark themselves as either a *"smoker"* *"non-smoker"* or *"unsmoker"* (someone who uses *"vaping products or heating products"* and doesn't use *"combustible smoke"*). In an earlier interview, Salzman had praised dating apps like Tinder as a new frontier for advertisers, saying *"dating platforms are incredibly important as media. People go to the app and check it fifteen, twenty times a day."* A report from a student at Victoria University, in Wellington, New Zealand, described encountering IQOS promotion via Tinder. (ref McKensie)

PMI's intent to use Tinder as an advertising platform is revealing of a youth targeted strategy. According to Statista, in 2015, 39% of global Tinder users were 16-24, and 41% were 25-34; in the US, those numbers were 48% (18-24) and 32% (25-34) respectively. Also, PMI has had something of a connection with Tinder before through Stefan Pierre, also known as *"Mr. Tinder."* Pierre received media attention for being the *"most right-swiped man on Tinder,"* essentially a demonstration of his attractiveness. In 2017, Pierre posed with an IQOS background in a post that reads as though it is sponsored, seeming to be a part of a larger influencer campaign for the IQOS Shoreditch store. This is not only one of many examples of IQOS' use of influencers—as of August 2019, Pierre has 170,000 followers on Instagram—but also a desire to appeal to consumers through the youth-based connotations of Tinder.

This appears to be a proposal from the Ogilvy Agency. We are not sure if it was implemented, but it does reveal what PMI was considering for its IQOS brand.



<https://www.katemonsterross.com/#/iqos>

SECTION 11. IQOS CLUB, REFERRAL PROGRAMS, & DISCOUNTS

There are two primary IQOS referral and rewards programs: IQOS Club and IQOSphere. The first, IQOS Club, is the most widespread, standard program. Its features vary by country but almost always include community-building events. The intent is to keep people excited about IQOS, providing a vibrant community around the smoking device. As was stated by the founder of the club: *“The idea is to always make the community experience lively to bring together like-minded people in search of an alternative not only to the traditional cigarette but also the electronic one”* (“*Nasce IQOS Club...*,” translated). This also seems to be the case for the extravagant IQOSphere, a program based in Japan. As a member of IQOSphere, one is allowed to enter into regular lotteries to win IQOS devices and free trips to luxury destinations. This alluring, random reward system could be said to abet one’s smoking addiction by giving them a reason to put off quitting. More generally, both IQOS Club and IQOSphere seem to foster a culture of smoking by offering intensive rewards for brand loyalty and promotion. In addition, there are several other IQOS referral and rewards programs, though most are small and their features overlap with those of IQOS Club.

IQOS Club

IQOS Club is the foremost referral and rewards program for IQOS available in multiple countries. Through the Club, users can not only win prizes for being loyal to the brand but also stay up-to-date with what’s going on in the IQOS World. The Club has a direct affiliation with the company and provides a centralized channel to keep people interested in and energized about what’s going on with IQOS. In countries where IQOS Club is available, you’re given the option to sign up after purchasing an IQOS device. Easy access helps give PMI a large, standardized list of people through which to distribute information about the brand.



There are three different levels in IQOS Club: Silver, Gold, and Platinum. When members sign up, they are automatically placed onto the Silver level. As expected, being a Silver Member does not seem to be especially rewarding. However, all IQOS club members, including Silver members, can get “invitation[s] to VIP events” as well as unspecified *“benefits from the brand and partners”* (ref *Nasce IQOS Club*, see below).

Access to IQOS events still varies based on one’s level in the club. Smokers are rewarded for continued use of the product. In fact, as the Italian IQOS website states, *“IQOS Club was not created as a*

place...to quit smoking...Instead, it was created to offer its users a different, unique, and complete experience, in the name of the authentic taste of heat-not-burn tobacco” (translated) (“Nasce IQOS Club”).



<https://iqosclub.sk/pravidlaidqosclub2eng.pdf>

Progressing within the club revolves around the number of people a user gets to buy the IQOS device (*“IQOS Club”*). Though there are multiple ways to earn points toward the level-up, in most countries, referral seems to be the only way to earn a substantial amount. In Russia, for instance, to get to platinum status, users essentially have to refer about 5 people; other methods for getting points are not very rewarding. (Possible IQOS Club Rewards) The rewards for IQOS Club are vague, perhaps intentionally. Each level specifies access to events, but it’s not clear what those events are. One could suppose that this would be beneficial to the brand. By making their club and its rewards exclusive, with a few hints that the rewards are of especially high quality, people will want to join and progress more than they would if the rewards were fixed. Secrecy also helps keep the IQOS community dynamic so that users stick around to see what’s next.

We have posted an IQOS Club videos on our SRITA website: tobacco.stanford.edu/videos/iqos.



The Three Different Levels in IQOS Club and Their Associated Benefits

<p>Silver</p>	<p>Russia: “CARE PLUS services will surround you with care and support from the first day with IQOS: 24/7 customer service, free replacement of the device in case of a breakdown for any reason, international support and many other benefits from the brand and partners.”</p>
<p>Gold</p>	<p>Russia: “Special offers for devices and accessories, delivery of an order at our expense and many offers from partners.”</p> <p>Italy: “those who have achieved the Gold badge will be able to access what we call ‘premium events,’ from football matches to special events in the IQOS Embassy.”</p>
<p>Platinum</p>	<p>Russia: “Maximum conditions for all offers from the brand and partners, access to closed limited edition series, additional guarantee for replacing the device in case of failure for any reason.”</p> <p>Italy: “For those who reach the Platinum level, then, we have thought of some VIP events, truly exclusive appointments and enriched by the presence of very special guests.”</p>

We do also know that there are private sales for Gold and Platinum club members (*“IQOS Club Private Sale”*). It’s not clear where these happen, though, or what’s being sold. Something else worth noting about IQOS Club is that they handle loyalty rewards, often on a case-by-case basis. Some people report that IQOS told them, from the start, that if they remained loyal for a year, they’d get a gift (unspecified in advance) (*“IQOS Club”*). In a way, this seems like clear encouragement to *not* stop using

the device. Additionally, as is described in the “*IQOS Coaches*” document, there’s evidence that coaches give luxurious gifts to early club members so as to generate a loyal, tight-knit fanbase. These members also get invited to private, high-class events (“*An Invitation to an IQOS Club Private Sale...*”). Aside from rewards and loyalty, IQOS Club also features “*informative*” quizzes and a sort of IQOS social network (“*Nasce IQOS Club*”). The quizzes are equivalent to a sort of self-indoctrination service where you learn about the safety of IQOS products.

IQOSphere

IQOSphere is the Japanese analogue of IQOS Club. However, as Japan is IQOS’s first and strongest market, IQOSphere is much better developed and far more rewarding. Most importantly, its prize system is luxurious - if not addictive: one can win extravagant prizes such as special edition IQOS devices and trips to spas through entry into a monthly lottery. This doubles as a brand promotion tactic since, to win entry, you are encouraged to post about IQOS on social media (“*Qoins*”). Additionally, IQOSphere functions as a creative hub, allowing people to design graphics for their device. To join IQOSphere, all you need is a valid Japanese ID or driver's license. But to start accumulating points, you need to actually register your IQOS device or enter a code from a pack of HEETS. Instagram #iqosphere has 10,111 posts as of February 1, 2020.



<https://iqosphere.jp/>



Rewards and lotteries

IQOSphere has reward system designed to keep users excited about the brand. In fact, there are two distinct lottery systems in which one can participate, both of which require “Qoins,” the equivalent of points in IQOS Club. The first lottery is a monthly raffle with a wide range of prizes. Some are basic, such as IQOS color caps and gift cards, and some are much more desirable. For instance, you can win one of several custom and designer IQOS devices as well as expensive gadgets such as the Lenovo Tab 4. Additionally, the brand distributes some of its promotional materials through its monthly lottery. Sadaharu Aoki’s “Coffee Gift” and a macaron-related prizes for some time during the Aoki Campaign. Both appear to be continuous with the IQOSignature brand where coffee, macarons, and chocolate (by Aoki) are often paired.

Next, the other kind of lottery is an “experience” lottery which gives entrants the chance to earn invitations to exclusive “limited events and famous facilities.” It’s not totally clear what these include. The only reward we’ve seen posted on social media is a trip to a spa (“An Email from IQOSphere”). That being said, the allure is similar to that of IQOS club: users are promised big and exclusive rewards for active

participation. Use of terms within both IQOSphere and IQOS Club such as “limited,” “VIP,” and “exclusive” make it seem like you’re an esteemed member of the IQOS Community. Basically, you’re made to feel special for promoting IQOS.

Along the way, by continually buying IQOS products and posting about them, you’re receiving random prizes every month. The reward system seen here is essentially the same as that used in many video games, now being called out by US senators as a common mechanism for habit formation in children (Ref Game Studios). Regardless of whether or not one wins huge prizes, the regularity of the rewards given keeps people coming back to the product community. This isn’t to say that loyalty programs are addictive themselves. Rather, what we would suggest is that by offering the chance for big wins including designer goods and free trips to luxury locations, PMI is making it much harder for people already addicted to nicotine to quit. Always on the verge of a score, it’s never unjustifiable to put off the challenge even longer.



Previous lottery rewards

Trip to a Spa (Link)
IQOS 2.4+ Camo Device (Link)
IQOS 3 Multi Nippon Device (Link)
Custom Art IQOS 2.4+ Device (Several Collections)
IQOS 2.4+ Motor Edition
Lenovo Tab 4
JBL Bluetooth Speaker
Canon SX620 Camera (Link)
Quo Gift Card (Link)
Seasonal Vegetables
Various T-Shirts
IQOS 3 Door Covers
IQOS 3 and Multi Color Caps
Ejoica Gift Cards (Link)
'Coffee Gift' by Steve Aoki (Link)
Macaroon Gift by Steve Aoki
Stylized IQOS + Heats Case (Link)
IQOS Camo Collection Gear (Link)

Reward Schedule

In registration	
IQOS 3 QAP product registration	200 coins +
Kit product registration	300 coins +
Single holder product registration	150 coins +
IQOS 7 days / 14 days support email	80 or 100 coins +
IQOS survey	50 coins +
In the store	
Visits to IQOS stores, etc.	75 coins +
This way of saving	
Join IQOS flat-rate plan	50 coins +
Friend Referral Program	
Introducing IQOS to your friends	100 coins +
With pack code	
Convert pack code to coins	0-150 coins +
LINE / Instagram	
Add friend to IQOS LINE official account	75 coins +
Follow Instagram account	75 coins +

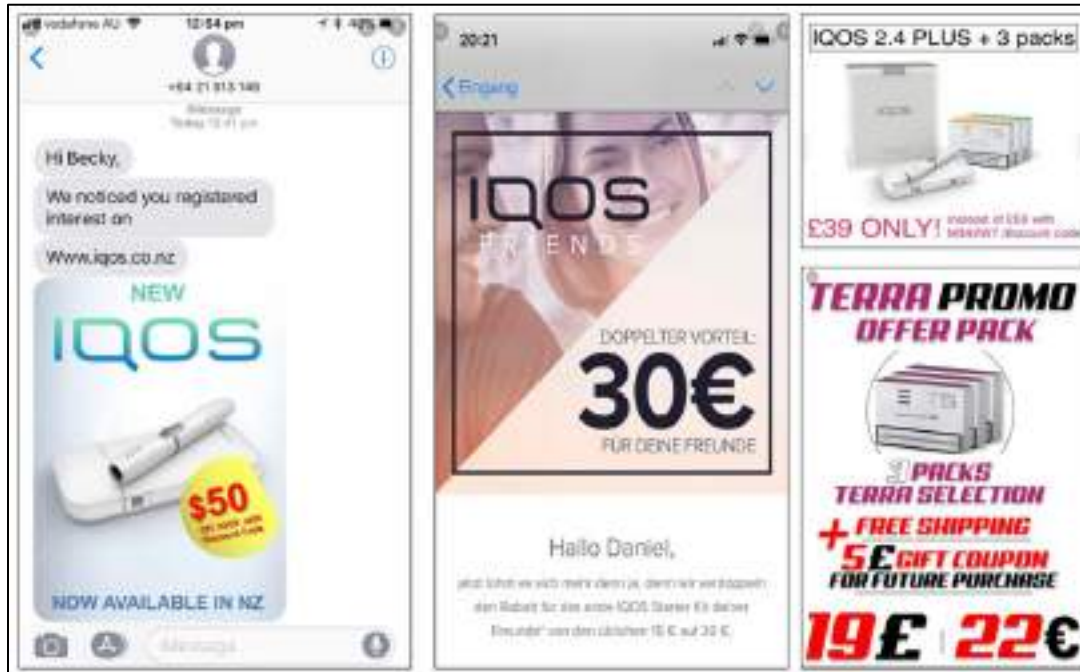
Creative aspect

In addition to IQOSphere's lottery program, there is an emphasis in the community on creativity. The title for the creative program is simply "IQOSphere CREATE," and it's based around making designs for the IQOS device. Its most basic feature is the ability to paint an IQOS logo for your device using Coins. These paint designs can be shared on the IQOSphere network for other users to view, although they're relatively simple. More elaborate designs can also be found on the network (presumably created and uploaded by users, though we don't know). It appears that these custom-designed devices can be ordered from the website. Some users collect these devices, encouraged by the brand which gives away new, professionally designed IQOS devices to current users (e.g. the IQOS camo device). The apparent goal is to encourage attachment to the brand and turn smoking into a sort of hobby.

Discounts

The business model of IQOS is analogous to razor blades or inexpensive computer printers: get the device into consumer's hands so that they will repeatedly buy the consumables. Discounting the device helps to recruit new users of the product's consumables. Addiction is a splendid business model as customers feel compelled to be repeat purchasers. In an addictive product, discounting "starter packs" helps to recruit new customers.

\$30 (New Zealand) €30 and £20 discount offers for IQOS.



Purchase IQOS on the installment plan: "We offer to purchase an iQOS device in installments for 3, 6 or 12 months."



<https://www.instagram.com/p/B228w5qBpf/>

Solicitation by IQOS New Zealand of a SRITA researcher on January 20, 2020. The low price may reflect clearing inventory of earlier generation devices.



Refer a Friend

IQOS's "Refer a friend" program is designed to entice users to act as members of their sales team by offering gifts or cash rewards from recruiting family and friends.

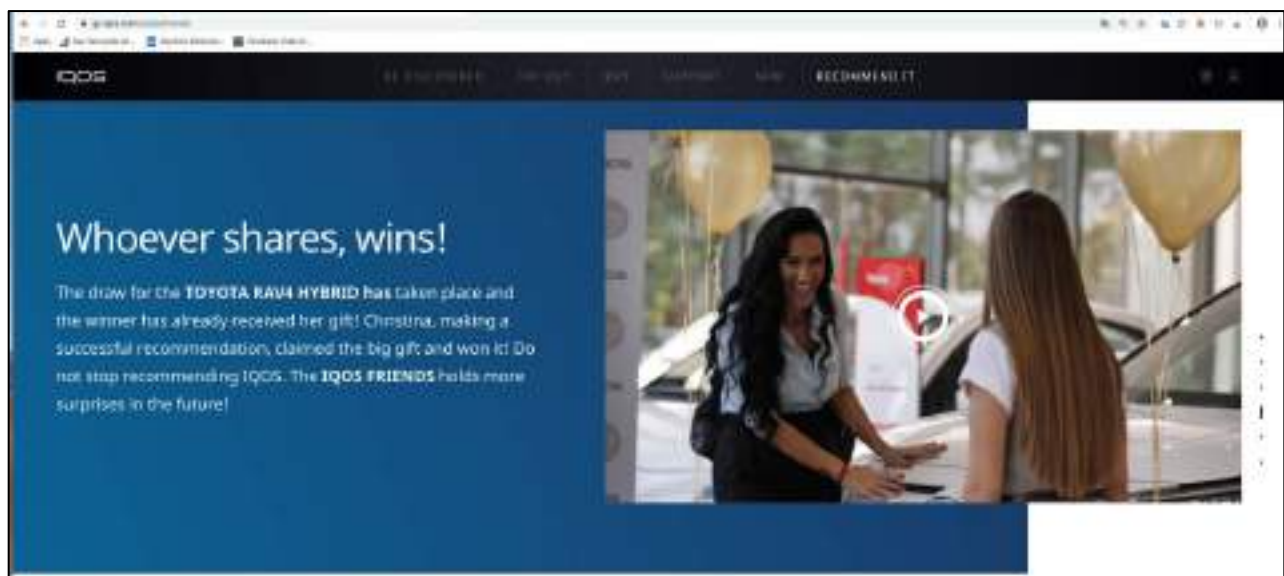
Refer a friend from the IQOS Canadian website.



Refer a friend from the IQOS USA website.



Refer a friend rewards from the IQOS Greek website- Offering a Toyota Rav4 hybrid.



Refer a friend rewards from the IQOS Ukrainian website.



Refer a friend rewards on the Greek IQOS website refers to “IQOS Friends.” This establishes a company link to Instagram #iqosfriends.



IQOS rewards programs, of which there are many, abet a culture of tobacco use. At face, they seem valiant, justified under the mission of rapidly reducing smoking risk. Yet when one actually looks at these programs, it becomes apparent that they substantially over-reward loyalty in a manner uncharacteristic of most companies. It seems problematic that an e-cigarette manufacturer would put such a large focus on status attainment (IQOS Club) and gamification (IQOSphere). When a referral program turns into an exclusive, high-class community, and when ‘rewards’ comes to mean playing a lottery every month for designer goods, all of which is used to keep people smoking, we’ve moved well beyond loyalty and perhaps into abetting addiction. Most people *want* to quit smoking -- PMI has done all it can to ease that desire by making smoking luxurious, an entry-point into a world of reward (ref Babb et al. 2017)

SECTION 12. Philip Morris International “Smoke Free World Campaign”

In September 2017, Philip Morris International (PMI) launched what it dubbed a *“Foundation for a Smoke-Free World.”* The company pledged to spend \$1 billion over a 12 year period, \$80 million per year, purportedly to support tobacco harm reduction by accelerating research into alternatives to cigarettes. While the company claims that the Foundation is free from PMI’s control, critics have been pointed out that the corporation maintains substantial control. Incongruous slogans such as *“A tobacco company that actually cares about health,”* which headlined a full page Wall Street Journal advertisement in January 2019, are revealing. They also featured advertisements with the slogan: *“Our New Year’s resolution – We’re trying to give up cigarettes.”* It seems clear that PMI’s *“unsmoke campaign”* is not focused upon smoking cessation, but rather legitimizing and promoting alternative nicotine delivery – i.e. its IQOS product.

As PMI remains active in undermining policies intended to reduce cigarette use, many public health advocates believe that the company created the Foundation as a public relations measure to burnish its image while promoting its IQOS brand. While it should be obvious, it should be emphasized that if PMI were serious about achieving a “*smoke free world*,” it would halt its aggressive worldwide marketing of Marlboro and its other heavily promoted cigarette brands.

Wall Street Journal Jan 22, 2019

A TOBACCO COMPANY THAT ACTUALLY CARES ABOUT HEALTH. HOW DID THAT HAPPEN?

Amos L. Hughes, CEO of Philip Morris International, wants his company to stop selling cigarettes.

Philip Morris International (PMI) is a tobacco company that is also a health company. In 2018, PMI announced that it would stop selling cigarettes in the United States by 2025. This is a significant commitment, as PMI is one of the largest tobacco companies in the world. The company's CEO, Amos L. Hughes, has said that this decision is part of a broader strategy to focus on developing and marketing alternative products that are healthier for smokers. PMI has already introduced several such products, including IQOS, a heated tobacco product that heats tobacco without burning it. The company also markets Nicorette, a line of nicotine replacement products. PMI's commitment to health is reflected in its research and development efforts, which are focused on creating products that are both satisfying and healthy. The company has also invested in research to understand the health risks of smoking and to develop ways to reduce these risks. PMI's commitment to health is a testament to the power of corporate responsibility and the importance of protecting public health.

OUR NEW YEAR'S RESOLUTION WE'RE TRYING TO GIVE UP CIGARETTES

Philip Morris is known for cigarettes. Every year, many smokers give them up. Now it's our turn.

Our ambition is to stop selling cigarettes in the UK. It won't be easy.

But we are determined to turn our vision into reality. There are 7.5 million adults in the UK who smoke. The best action they can take is to quit smoking. Many will succeed.

But many will continue to smoke. That's why we want to replace cigarettes with products such as e-cigarettes and heated tobacco, which are a better choice for the millions of men and women in the UK who would otherwise not stop smoking.

So far, we have invested £2.5bn on research and development. And it's making a difference. We've introduced new products in many countries and millions of adult smokers have abandoned cigarettes and switched to better options.

No cigarette company has done anything like this before. You might wonder if we really mean it. We do – and we're therefore making these commitments for 2025:

- 1. Launch a website and campaign to provide smokers with information on quitting and on alternatives to cigarettes;
- 2. Offer to support Local Authority cessation services where smoking rates are highest;
- 3. Seek Government approval to insert, directly into our cigarette packs, information on quitting and on switching;
- 4. Expand the availability of new, alternative products in the UK.

Never starting or quitting is always best. For those who would not otherwise stop, there are better alternatives than continuing to smoke. You can find out more about quitting and about alternatives to smoking at www.smokefreefuture.co.uk

PHILIP MORRIS INTERNATIONAL



Philip Morris International's "Unsmoke" campaign is part of its Smoke-Free World public relations effort. Their description "no smoke" rather than "no tobacco" makes it clear that their intention is to preserve their customers by transitioning them to other nicotine delivery systems in their product line.



Philip Morris "Hold My Light: Campaign" – United Kingdom:

Hold My Light:

"Hold My Light" is UK based PMI program aimed at smokers becoming "Smoke-free with a little help from your friends" by adopting "A new way to smoke." (<https://smokefreefuture.co.uk/hold-my-light/#introduction>) This program is clearly a thinly veiled IQOS promotion. "Hold my Light" was designed by Lisa Taylor. (<https://creativebylisa.com/Hold-My-Light>). The UK newspaper Daily Mirror maintains a series of what they describe to be "advertorials" (<https://www.mirror.co.uk/all-about/hold-my-light-campaign>).

Cancer Research UK characterized as “a staggering hypocrisy.”



HOLD MY LIGHT

STOP SMOKING WITH A LITTLE HELP FROM YOUR FRIENDS

START MY JOURNEY →

← SHARE

HEATED TOBACCO

7 out of 10 smokers using heated tobacco report using cigarettes "less frequently"

The British Heart Foundation (BHF) has published a report showing that smokers who use heated tobacco products (HTPs) are less likely to smoke cigarettes frequently.

The report, based on data from the BHF's 2018 survey, shows that smokers who use HTPs are less likely to smoke cigarettes frequently. This is a significant finding, as it suggests that HTPs may be a safer alternative to traditional cigarettes.

The report also found that smokers who use HTPs are more likely to quit smoking. This is a positive outcome, as it suggests that HTPs may be a helpful tool for smokers looking to quit.

Overall, the report provides strong evidence that HTPs are a safer alternative to traditional cigarettes. It also suggests that HTPs may be a helpful tool for smokers looking to quit.

For more information, visit www.bhf.org.uk

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For more information, visit www.bhf.org.uk



DAILY Mirror
YOUR PAPER IS INSIDE

HOLD MY LIGHT

A NEW WAY TO GIVE UP CIGARETTES

www.holdmylight.co.uk

Philip Morris
"Hold My Light"
IQOS Promotion

October 2018
Wrap around
Daily Mirror UK

HOLD MY LIGHT

A NEW WAY TO GIVE UP CIGARETTES

www.holdmylight.co.uk



Smoke-free with a little help from your friends.

HOLD MY LIGHT

www.holdmylight.co.uk

SECTION 13: IQOS EMULATION OF THE OTHER POPULAR PRODUCTS

IQOS emulation of Apple Design, Packaging, and Retail Environment

IQOS clearly sought to emulate the look and feel of the exceptionally popular Apple line of products. The name IQOS with the lead “i or I” is a clear reference to Apples product lines: iMac, iPad, iPod, and iPhone. The IQOS systems is housed in a rounded rectangle, a universal design feature of Apple products. Even the packaging of IQOS is reminiscent of Apple as are the spectrum of its colors.

IQOS emulation of Apple’s rounded rectangle design and packaging.



IQOS emulation of iPhone’s popular rose gold color.





IQOS stores mirror many of the design elements of Apple stores. The two are fundamentally similar in their use of open spaces, airiness, and light. Both are product focused, with central table displays that feature their main products in evenly spaced, minimalist arrangements. This similarity associates IQOS with cutting-edge technology. The tables on which the devices lie are unmistakably similar in their light wood material, floor arrangement, and design. In addition to their central products, the stores arrange accessories in similar ways. iPhone cases and IQOS cases line the walls of their respective stores in neat, colorful rows. Some diagonally oriented displays of Apple accessories also have a striking resemblance to the mosaic-style HEETS displays on the walls of IQOS stores. Both stores break up their contained spaces and add color with plants, which often cover an accent wall in both brands' stores. Also on the walls, both stores sometimes feature digital displays with large, minimalist, and high-quality photos or videos of their devices. In echoing Apple's store design, IQOS may be attempting to replicate Apple's success in commercializing an elite, expensive device to a wide market.

Comparison of glass fronted Apple and IQOS store fronts.



Wooden display table in Apple and IQOS stores. Note the loose arrangements of the products on the tables and similarity of the wall displays.



Similarities between the wood backed wall displays of iPhones and iQOS devices.



Similarities between Apple and IOQS store shopping bags.



IQOS emulation of the Tiffany and other prestigious luxury brands

IQOS as a brand places a large emphasis on being 'exclusive' and treating its top customers like 'VIPs.' They've been known to send out custom invitations to events in a robin's egg blue color, adorned by a white ribbon, strikingly reminiscent to a Tiffany gift box. The intention is to associate the brand with luxury and high society, perhaps part their effort to attract young creators and influencers. Coloration similar to Tiffany's distinct shade of blue also appears in IQOS's logo, its hummingbird, and even its retail store bags.

Tiffany robin's egg blue invitations to an exclusive IQOS event Romania (08/31/2016) compared with a Tiffany gift box. Note the Tiffany coloration of the IQOS shopping bag.



<https://www.instagram.com/p/BJxuQYhBLwm>

Russian IQOS coaches, IQOS high heel, and IQOS cupcakes in Tiffany blue.



Co-branding of IQOS with prestige brands Gucci and Louis Vuitton and with Mercedes Benz at the 2019 Bambi Awards.



https://www.instagram.com/p/BojM1j1C_9R/

<https://www.zimbio.com/photos/Viktoria+Rader/IQOS+At+Bambi+Awards+2019/ZhKF1xQoEW8>

Co-branding of IQOS with Mercedes Benz Fashion Day, St. Petersburg April 1, 2017.



<https://geo.pro/reportage/451955-mercedes-benz-fashion-day-st-petersburg-novye-imena-v-dizayne-ot-sobaka-ru-novye-imena-v-dizayne-pri/>

Co-marketing of IQOS with high end cognac Rémy Martin and luxury watch maker Baume Mercier at the May 2019 Playboy Playmate of the Year event at Casino Baden Baden.



<https://www.burda.com/de/news/playboy-kurt-veronika-klimovits-zur-playmate-des-j/>

IQOS Pink Party IQOS Lounge Riccione, Italy July 2018. IQOS is promoted as a high end, luxury brand. In these images, the product revealed by uncovering a transparent jewelry box, evocative of a museum display, from its elegant pink silk drape.



https://www.facebook.com/pg/WhiteEventSrl/photos/?tab=album&album_id=2257337977821612



https://www.facebook.com/pg/WhiteEventSrl/photos/?tab=album&album_id=2257337977821612

SECTION 14. IQOS MAGAZINES

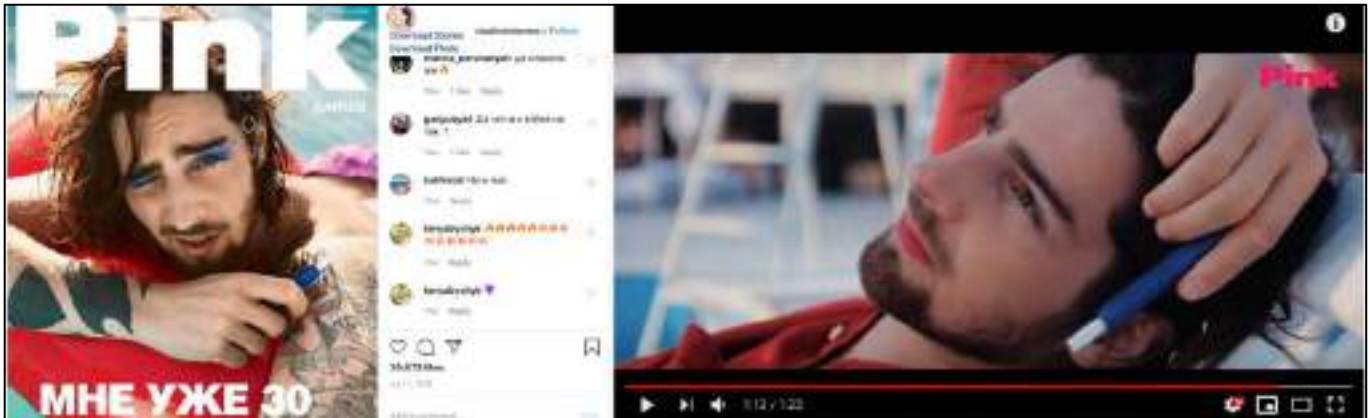
Ukrainian magazines

Philip Morris' IQOS advertises in a number of different Ukrainian magazines. Seemingly, sponsored posts have appeared in Bigmir.net (a general audience media site), Focus Magazine (for wealthy people in cities), MPort (a men's magazine), and the automotive magazine Driving Ukraine. There are also a large number of IQOS-related articles in the Ukrainian editions of Vogue, Marie Claire, and Harper's Bazaar. While some of the articles clearly indicate being sponsored by IQOS, the relationship in other articles is not as clear. Many of these articles fall into one of three categories: the editor(s) of the magazine try IQOS for a week, IQOS is listed as one of several gift ideas for a holiday, or the article reports on the launch of the IQOS 3 in Ukraine. The vast majority of the articles include a link to the Ukrainian IQOS website (either iqos.ua or iqos.com.ua), and some give additional information as to where to buy IQOS in person.

An eye catching example of this kind of promotion is IQOS advertising in PINK Magazine. PINK is a Ukrainian pop culture magazine that covers the *"latest news from the world of fashion, beauty, shopping, and the life of stars."* (<https://pink.ua/>) The front cover of PINK's July issue is singer and TV contestant Vladimir Dantes lying in a pool and holding a bright blue IQOS. A video of the photoshoot focused heavily on the IQOS, showing Dantes using it and being handed a pack of HEETS (the mandatory warning label is covered by his hands) The cover image posted by Dantes on his personal Instagram handle, where it garnered 39,673 likes from his 538,000 followers (numbers as of January 2020).

We have posted a PINK Magazine IQOS on our SRITA website: tobacco.stanford.edu/videos/iqos.

Pink magazine featuring model Vladimir Dantes holding an IQOS.

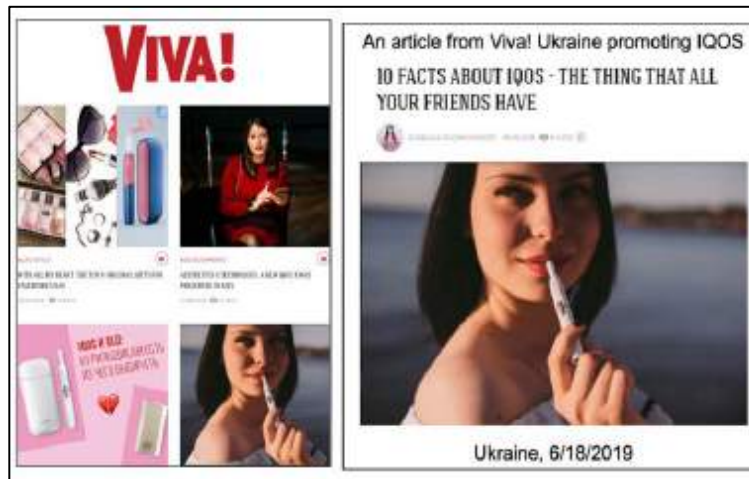


Pink website: <https://pink.ua/>

Video of photoshoot: <https://youtu.be/48bnlegRoL8>

Instagram post from Vladimir Dantes: <https://www.instagram.com/p/BzXYRo4nkL4/>

Ukrainian Magazine Viva with 372K followers on Instagram targeting a youthful all-your-friends-are-doing-it audience.



<https://viva.ua/lifestyle/3469-10-faktov-ob-iqos-toy-shtuke-kotoraya-est-u-vseh-tvoih-znakomyh>



Vogue Ukraine: <https://vogue.ua/article/fashion/tendencii/luchshie-aksessuary-v-zolotom-cvete.html>

Marie Claire Ukraine: <https://marieclaire.ua/lifestyle/redaktsiya-testiruet-gadzhety-dlya-nagrevaniya-tabaka-iqos/>

The Vogue article highlights IQOS cases created by five young fashion designers as part of a contest run by IQOS. Unlike many IQOS articles, this one is marked as sponsored.



<https://www.vogue.it/vogue-talents/news/2017/12/19/regali-di-natale-creativi-design-iqos-mater-style-cover>

Cosmopolitan Russia

Cosmo's Chief Editor recommends: *"breakfast – makeup – IQOS."*



<https://www.cosmo.ru/lifestyle/stil-zhizni/odin-den-iz-zhizni-glavnogo-redaktora-sosmoru/>



<https://www.cosmo.ru/tag/iqos/>

IQOS ZONE & Cosmopolitan Summer Party Cosmopolitan “gathered all the fashionistas.” August 20, 2017.



<https://geo.pro/reportage/466876-iqos-zone-cosmopolitan-summer-party/>



Marie Claire event at the IQOS space at the Afimall Shopping Center, Moscow October 18, 2016.



<https://geo.pro/reportage/430118-otkrytaya-diskussiya-puteshestviya-kotorye-menyayut-zhizn/>

Interview Magazine event September 27, 2016. "From September to December, Interview together with IQOS will conduct a series of open interviews with Alena Doletskaya with the main Moscow trendsetters to talk about contemporary art, fashion and media. Each of the four events of the project "It's All About Changes" will be dedicated to changes that will very soon turn our ideas about the world upside down. The first character is Andrei Saveliev, creative producer of the evening Urgant show, co-founder of Sobaka.ru magazine, the first editor-in-chief of Time Out in Russia and an artist."



<https://geo.pro/reportage/427482-it-s-all-about-changes-public-talk-s-alenoy-doletskoy-i-andreem-savelevym/>

Elle Magazine Ukraine/IQOS Summer Party at the Odessa Restaurant Park Residence July 14, 2017.



<https://geo.pro/reportage/463812-elle-summer-party-zona-iqos/>



IQOS-SLEEK Magazine Very Kinky Valentine's Day Party Clärchens Ballhaus in Berlin on February 14th, 2019. SLEEK Magazine (<https://www.sleek-mag.com/>) describes itself as "Europe's leading voice on art, fashion and photography." SLEEK celebrated Valentines Day "Berlin style" with guests "donning lace, leather and latex, danced until the early hours."



<https://www.sleek-mag.com/article/sleek-valentines-party/>

VICE Media

In March 2019, PMI made a \$6.5 million agreement with Vice Media to promote IQOS. (Refs Hancock, Voshart) The Vice Magazine Media Kit describes it as the *“Fast growing, #1 youth media company in the world.”* (ref Vice Media Guide) The PMI sponsorship appears to be having an effect on the VICE content. In January 2018, VICE ran an article about IQOS whose content covered the main points of the IQOS marketing department. (ref Hicks) In February 2019 (ref. Jensen) in an article titled *“Smoking Is Bad, But So Is Everything Else”* opined: *“In a better world, we'd reject the moralizing instinct to deem some people worthy of dignity—and others, not—based on how they choose to cope with the circumstances of their lives”*. In September 2019, an article titled *“Teens Use Tobacco as Much as They Vape—But, OK! Ban Flavored Juul Pods!”* opined: *“. . . trying to ineffectually ban something instead of actually trying to address the root causes of the problem in the first place.”* (ref Walker) Another article opined: *“Banning Flavored Vapes Might Be Good for Teens. It Also Might Be Racist.”* (ref Norcia) Of note, VICE Magazine chosen by JUUL to carry its first ads in print, part of its infamous *“Vaporized”* campaign, during JUUL's launch in the summer of 2015. (ref Jackler JUUL) The senior author of this paper was contacted by production company inviting participation in a VICE documentary on emerging tobacco products, but declined to when PMI sponsorship was revealed.

In April 2019, eight national and international health organizations urged The Walt Disney Company to require its partner network, VICE, to terminate its relationship with Philip Morris International. In May 2019, due to VICE's poor performance in the media marketplace, Disney wrote down \$353 million of its investment. (ref Palmiri). It is ironic that both a tobacco company and Walt Disney would make an affiliation with a media empire named *“VICE,”* a word which the Merriam-Webster dictionary defines as: *“moral depravity or corruption.”*

Vice Magazine Media Kit describes it as the “Fastest growing, #1 youth media company in the world.”

Smoking Is Bad, But So Is Everything Else

In a better world, we'd reject the moralizing instinct to deem some people worthy of dignity – and others, not – based on how they choose to cope with the circumstances of their lives.

By **Brandy Jensen**





Feb 25 2019, 9:44am  Share  Tweet  Snap

PHOTO BY NASIR YISAR VIA STOCKSY.

My years as a smoker have involved a lot of time spent doing two things: looking cool and lying to people about how I plan to stop soon. In the latter case, I've met many concerned questions about whether I'm going to quit with a shamefaced, breathless “oh I know it's awful I really do intend to stop” or “I know, it's the worst, I'm absolutely giving it up.” Lately, though, I've taken to responding, “Why would I?”



https://www.vice.com/en_us/article/43zqjj/quitting-smoking-cigarettes-essay



Banning Flavored Vapes Might Be Good for Teens. It Also Might Be Racist

It seems awful strange to some experts that the feds are rushing to ban menthol e-cigs even as deadly menthol cigarettes remain on the market.

https://www.vice.com/en_us/article/8xw5n3/banning-flavored-juul-vapes-might-be-good-for-teens-it-also-might-be-racist



VICE and Philip Morris: Partners in Crime

Philip Morris continues its century-long campaign of deception with the help of Vice Media



Daniel Voshart [Follow](#)
Mar 21 · 15 min read

Disclosure: I'm a former documentary filmmaker now specializing in the uses of Virtual Reality in Architecture. I do forensic consultation and write in my spare time. I don't smoke.

WARNING: This blog contains impolite language and disturbing imagery

DISCLOSURE TO YOU BY THE DEPARTMENT OF REVENUE TECHNOLOGY

<https://notvice.com/vice-and-philip-morris-international-partnership-c0cd977738df>

Health Organizations Call on The Walt Disney Company to Terminate Vice Media Partnership with Philip Morris International

Deal puts youth at risk and undermines Disney's commitment to reducing youth tobacco use and exposure to smoking imagery



<https://www.prnewswire.com/news-releases/health-organizations-call-on-the-walt-disney-company-to-terminate-vice-media-partnership-with-philip-morris-international-300838092.html>

The Hill:

The Hill is a Washington DC based periodical which describes itself as: *“the premier source for policy and political news.”* The Hill is distributed for free in newspaper boxes around the U.S. Capitol building and mailed directly to all congressional offices. *“The Hill's Sponsored content program is designed to allow your company or association to promote itself and the issues it cares about within the flow of our award-winning journalism.”* (<https://thehill.com/sponsored>)

In January 2020, PMI sponsored “The Hill” with a series of pop up advertisements lobbying congress for regulation favorable to IQOS.



<https://thehill.com/policy/cybersecurity/overnights/479838-hillicon-valley-wyden-calls-on-nsa-to-investigate-white-house>



Older news articles retroactively adorned by PMI Popup advertisements.



<https://thehill.com/policy/healthcare/440284-philip-morris-starts-uk-life-insurance-firm-offering-discounts-to-smokers>
<https://thehill.com/policy/healthcare/462965-altria-philip-morris-call-off-potential-merger-amid-vaping-crackdown>

IQOS Mag

IQOS Mag is a source of information about IQOS, some practical tips and reviews, but consistently championing the device. It claims to be independent of the company, but the hand of the company seems unmistakable. IQOS Mag appears in multiple languages (iqosmag.de, .uk, .it, .sk, cz, .pl, .hu, etc.)



IQOS Mag claims that it is independent of PMI.

Our Facebook · About website · Techlive · myNokia · mBarzin

IQOSmag.com is an independent magazine. Philip Morris Products S.A. did not authorize, take over the patronage, or otherwise approve it. You should know that the healthiest thing is not to smoke at all.

Made by IQOSmag.com © 2019

By entering the site, you agree to store your cookies to view the appropriate ads, which is the only source of finance for your business.

IQOS “spreads like an avalanche.”

IQOS MAG Search for iqos, cigarettes, cigars... P f i English +

IQOS · WHAT IS IQOS · REVIEWS · TIPS AND TRICKS · HEETS · ACCESSORIES · PRICES AND SALES IQOS

Independent magazine. Philip Morris Products S.A. did not authorize, take over the patronage, or otherwise approve it.

How to see your IQOS among friends or family at first sight? Mark it or you are without a guarantee

27/04/2018 TIPS AND TRICKS 1000

IQOS spreads like an avalanche. Among the friends goes hand in hand, what causing unexpected difficulties that we have known in the past with lighters. Did you come home from the bar in a pub or from friends with 'your' IQOS?

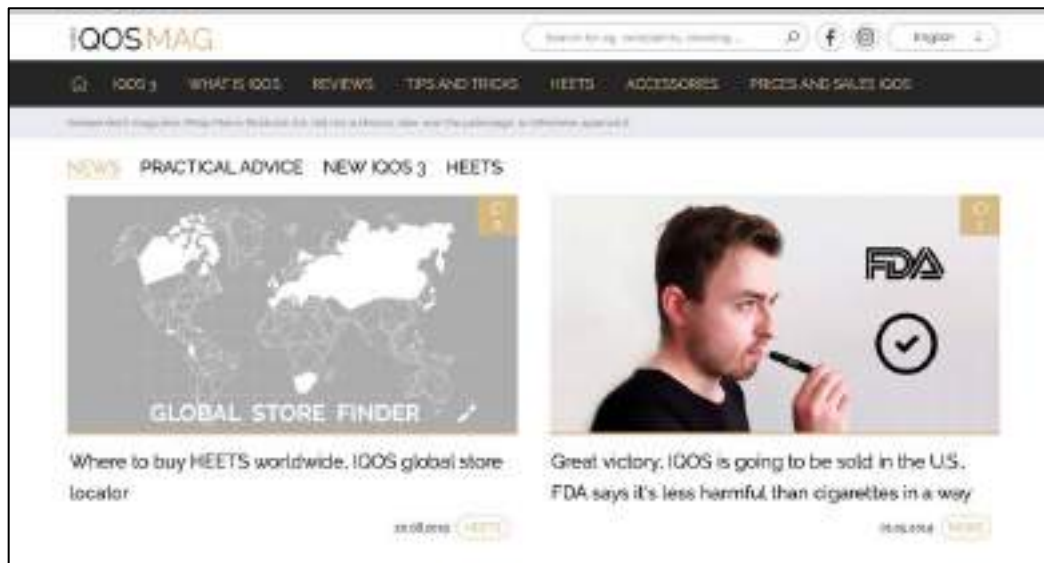


Ad created by Google

Report this ad

Why this ad? Is

“Great Victory, IQOS is going to be sold in the US.”



“An extreme drop in harmful substances in HEETS inhaled tobacco smoke.”



“Coughing is very normal. It is just a matter of habit to learn to take lighter and longer puffs, with more pauses so the vapor can get cooled down in the filter.”



SECTION 15. IQOS INSURANCE

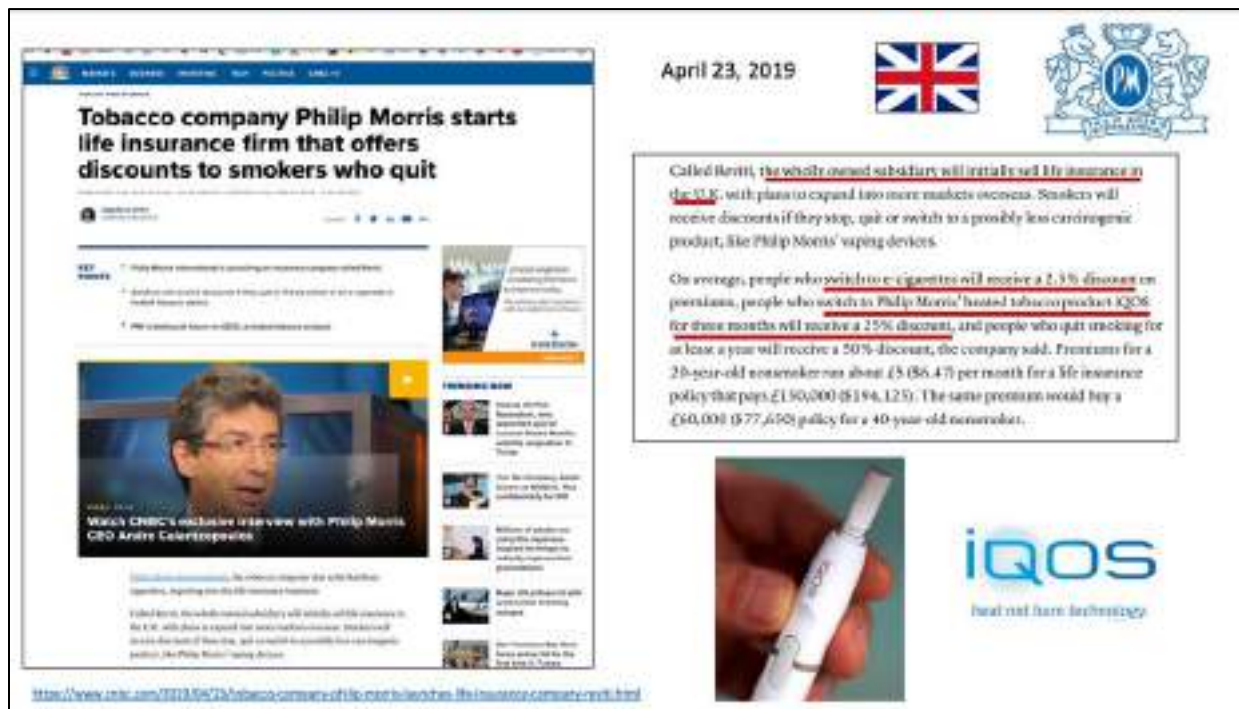
In July 2018, PMI formed Reviti Limited (<https://www.revitalife.com>) to sell life insurance discounted if smokers transition to their IQOS product. Initially launched in the UK, the company plans to expand to other markets. (ref. Prochaska) Reviti's slogan is *"Make the change today"* is a clear reference to the IQOS slogan *"this changes everything"* and reveals that it rewards not tobacco cessation, but adopted of an alternative manner of satisfying nicotine addiction. The Reviti website features the rather remarkable slogan: *"Bringing life back into insurance."*

Reviti's frequently asked questions (FAQs – see below) makes clear that their underlying goal is not tobacco cessation, but rather transitioning smokers to IQOS: *"PMI is committed to work towards a smoke-free future which is fully aligned with Reviti's goals of enabling people to make better lifestyle choices. PMI is building a future on a new category of smoke-free products that, while not risk-free, are a much better choice than continuing to smoke."* It has been reported that IQOS has the capability of transmitting data to PMI, suggesting a potential means of established qualification for the discounted rate. (ref Lasseter)

Reviti explains their discount program by posing a revealingly worded question from a customer and answering it in their FAQs section:

Customer question: *"I am a user of a science backed smoke-free alternative. Will this affect the cost of my life insurance?"*

Company reply: *"If you choose to switch to a science backed smoke-free alternative (currently, the IQOS tobacco heating system), then, after 3 months of exclusive use, you'll receive a discount of up to 25% off your premiums."*



The image is a composite of two parts. On the left is a screenshot of a news article from the BBC website, dated April 23, 2019. The headline reads: "Tobacco company Philip Morris starts life insurance firm that offers discounts to smokers who quit". The article includes a video player showing an interview with Philip Morris CEO Andre Calentopoulou. On the right is a promotional graphic for Reviti life insurance. It features the date "April 23, 2019", the UK flag, and the Reviti logo. The text describes the insurance company and its discount program. At the bottom right of the graphic is the IQOS logo and a close-up image of a hand holding an IQOS device.

April 23, 2019

Called Reviti, the wholly owned subsidiary will initially sell life insurance in the UK, with plans to expand into more markets overseas. Smokers will receive discounts if they stop, quit or switch to a possibly less carcinogenic product, like Philip Morris' vaping devices.

On average, people who switch to e-cigarettes will receive a 2.3% discount on premiums, people who switch to Philip Morris' heated tobacco product IQOS for three months will receive a 25% discount, and people who quit smoking for at least a year will receive a 50% discount, the company said. Premiums for a 20-year-old nonsmoker run about £5 (\$6.47) per month for a life insurance policy that pays £150,000 (\$194,125). The same premium would buy a £60,000 (\$77,678) policy for a 40-year-old nonsmoker.

iqos
heat not burn technology

SECTION 16. IQOS DESIGN AWARD

In December 2017, IQOS received *"The GOOD Design"* award presented by the Chicago Athenaeum Museum of Architecture and Design and the European Centre for Architecture, Art, Design and Urban Studies. IQOS was a winner in the electronics category of the awards program.

According to Good Design, *"The emphasis of the GOOD DESIGN® program is on quality design of the highest form, function, and aesthetics a standard beyond ordinary consumer products and graphics. The Chicago Athenaeum's GOOD DESIGN® program forwards the ideals of a design process that embodies product excellence and endurance and strong public identity."*

Bertrand Bonvin, PMI'S Senior Vice President for IQOS Design & User Experience department, *"When we created IQOS, we wanted to provide an intuitive and satisfying experience for smokers, looking for a better alternative to cigarettes. Over 5 million men and women have abandoned cigarettes and switched to IQOS. Being recognized for the first time by the GOOD DESIGN® Awards is a notable achievement in our journey towards a smoke-free future."* IQOS's design award follows a similar path to that of JUUL, whose mission is also to encourage cigarette users to switch to their device, won a 2015 Innovation by Design Award.

It is unclear whether this award is a vanity paid honor, as with IQOS environmental awards (see next Section), or an earned accolade. PMI did pay an entry fee and licensed the Good Design logo for use in its promotion. The Good Design website emphasizes the promotional value of the award: *"All awarded projects are listed every year at an online platform which receives at least 1 million visits per year. Dissemination of the Good Design word also involves the hosting of exhibitions and events presenting the awarded projects in different places all over the world. Finally all the award - winning projects are published in our official Good Design Yearbook."*

Advertising the Good Design Award from the South African IQOS website under paid license.

 <p>The Good Design Awards Copyright © 2004 - 2017 The Chicago Athenaeum and Metropolitan Arts Press Ltd. curatorial@chicagoathenaeum.com</p>	<p>Awarded design firms and manufacturers have the right to enter into a limited legal licensing agreement to use of the Museum's GOOD DESIGN® logo to mark and identify the selected product or graphic in their marketing, publications, promotions, and communication campaigns as a public symbol of product and service quality. This public seal of approval immediately informs consumers to understand that the selected product and graphic meets the most rigorous test and criteria for absolute design excellence.</p>		
			
<p>Licensed use of "Good Design Award and its logo by PMI for its IQOS brand</p>			<p>PMI press release</p>

SECTION 17. IQOS ENVIRONMENTAL POLLUTION

Electronic cigarette devices contribute a stream of plastics, metals, batteries, which end up in the ever growing e-waste stream. Combustible cigarette butts litter street around the world, clog drains, and injure wildlife. As they are not diminished during use, discarded IQOS HEETS produce more waste per stick than traditional cigarettes. As IQOS rapidly grows in the global market, the load of IQOS waste is a problem that needs to be addressed. PMI corporate touts recycling programs for the devices, but the millions and millions of their butts entering the waste stream represent a significant concern.



Slide from PMI investor presentation pointing out sustainability efforts (July 2019)

Sustainability at PMI: Reducing Environmental Footprint



Climate



- CDP Climate A-List for 5 years in a row
- CDP Supplier engagement leadership for 2 years in a row

Water



- PMI's manufacturing operations in Brazil, Portugal and Turkey were AWS certified
- Commitment to certify all factories by 2025



Electronic Waste

- Collection and recycling of IQOS used devices
- 2 global hubs for recycling component parts



Litter

- In connection with the anticipated implementation of the EU Directive on single-use plastics, we are preparing measures to improve:
 - The behavior of littering consumers
 - Our products' sustainability footprint

Unlike combustible cigarettes, the butt of HEETS are not partly consumed in use.
 “PMI employees discuss recycling of HeatSticks: “You might not be finished, butt I’m not”.



Discarded HEETS – a significant environmental concern.



Both PMI and independent vendors offer receptacles for discarded HEETS.



SECTION 18. PURCHASED ACCOLADES: ENVIRONMENTAL “AWARDS” COMMISSIONED FOR PR PURPOSES

The public relations team at PMI makes frequent use of “awards” from companies who are in the lucrative business of selling awards to companies. These fee-based “honors” are a genre fake awards utilized by public relations firms to burnish the reputation of their business clients. (refs Barrett, Dee) The Better Business Bureau warns that there are: *“a lot of vanity awards . . . available in virtually every industry and for every profession. For some, you fill out a form and pay a fee to enter the ‘competition.’”* (ref BBB Vanity)

On January 16, 2020, PMI issued a press release, transmitted via Business Wire, which implied that the company had received a prestigious award for sustainability when, in fact, the *“50 Sustainability and Climate Leaders Project”* appears to be a company-funded promotional documentary. The documentary 50 Climate Leaders (<https://www.50climateleaders.com/>) was created for PMI by Created by TBD Media Group (<https://tbdmediagroup.com/>) a company which offers *“Solutions-Based Video Journalism.”* Its website describes its goal of: *“BRINGING BRAND STORIES TO LIFE – Our aim is always to connect brands with their customers via a beautiful piece of content. Brands have great stories to tell, we simply bring them to life as their storytellers. Combining over 30 years of experience in marketing, content creation, video production and publishing.”*

Three recent environmental “awards” received by PMI.



<https://www.businesswire.com/news/home/20200116005278/en/Philip-Morris-International-Recognized-Sustainability-Action-Ambition>
<https://www.businesswire.com/news/home/20200117005168/en/Philip-Morris-International-Recognized-Business-Excellence-4th>
<https://www.businesswire.com/news/home/20190123005404/en/PMI-Elite-Group-Companies-Score-Climate-Change>

The video 50 Projects title “Leading a transformation in the tobacco industry to create a smoke-free future and ultimately replace cigarettes with better alternatives” makes it clear that it is part of PMI’s IQOS Smoke Free marketing campaign.



<https://www.50climateleaders.com/pmi-leading-a-transformation-in-the-tobacco-industry-to-create-a-smoke-free-future-and-ultimately-replace-cigarettes-with-better-alternatives/>

One Planet Awards is a for profit venture part of Silicon Valley Communications which offer a wide array of awards to businesses willing to pay for them (<https://svusawards.com>). On January 17, 2020, PMI trumpeted its One Planet Award purportedly for its: “*achievements in delivering a smoke free future.*” SVUS markets its awards as a: “*cost-effective way to build your brand by recognizing and keeping your executives, employees, clients, and business partners motivated.*” “*As a SVUS Awards winner you will get complimentary access to tools and resources to promote your recognitions including winner logos, press release templates, 1:1 industry written interviews, and social media visibility opportunities. The SVUS Awards trophy is one of the world’s most impressive trophies which will amaze your executives, employees, clients, and business partners.*”



<https://oneplanetawards.com/store/>

In January 2019, PMI announced that it had: “Achieved a place on the CDP Climate Change A List for the fifth consecutive year.”



<https://www.youtube.com/watch?v=NFaKD44ntlk>

It is more than a bit ironic that PMI arranges environmental merit awards when its cigarette, cigar, and heated tobacco products result in concentrated smoke-polluted air directly inhaled into millions of their customer's lungs. PMI maintains a website promoting its environmental programs. (<https://www.pmi.com/sustainability>). It also has a website promoting its awards. (<https://www.pmi.com/careers/our-awards>)

PMI also issues press releases about types of corporate awards such as the January 2020 “*BIG Innovation Award*” from the Business Intelligence Group (<https://www.bintelligence.com/>). The BIG company's product line are a series of awards and their associated trophies. As usual, the PMI BIG Award PR announcement features a promotional paragraph for IQOS.



<https://www.businesswire.com/news/home/20200122005526/en/Philip-Morris-International-Wins-2020-BIG-Innovation>

SECTION 19. COMPARISON OF IQOS AND TOBACCO ADVERTISING

IQOS advertising recapitulates the imagery and slogans of traditional cigarette advertising.











Comparison of feminine, youthful ads for IQOS and Cigarettes

@iqos_ua (Ukraine)	Kiss Cigarettes, Russian Campaign	@iqostyle_arm
From left to right: Ukraine, 04/01/2019; Russia; Armenia 07/15/2019		





SECTION 20: ILLUSTRATIONS FROM LONG HISTORY OF REDUCED RISK ADVERTISING.

Light cigarettes.



Super light, ultra light cigarettes. Such "health proxy" claims were banned in 2009 by the Family Smoking Prevention and Tobacco Control Act.



Illustrations from the "tar wars" of the 1970s -1980s.



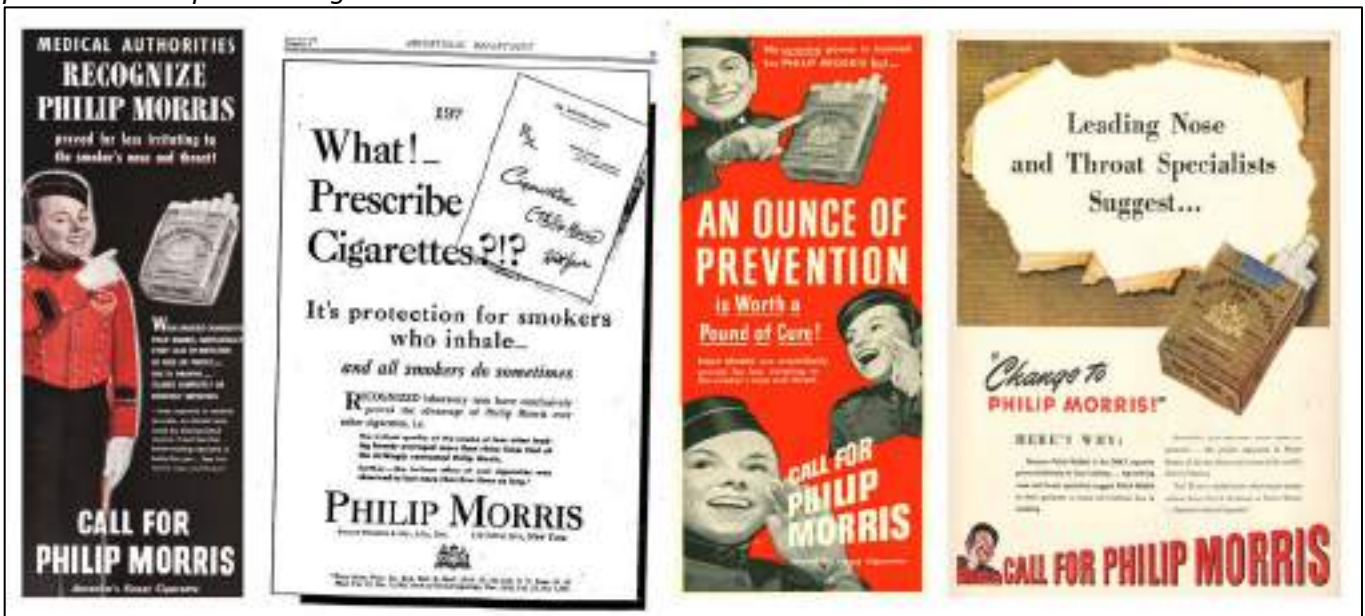
Filtered cigarettes.



No additives, natural, less toxins, reduced carcinogens.



Philip Morris, maker of IQOS, has a long history of reduced risk claims. Advertisements of this type promoted Philip Morris cigarettes in the 1930s and 1940s.



Philip Morris, maker of IQOS, has a long history of reduced risk claims for its international best seller Marlboro. In the 1930s. Marlboro as a women's brand advertised with the slogan "Mild as May." Marlboro Lights were introduced in 1972 and banned 38 years later by a 2009 act of Congress.



When use of the term "light" was prohibited, Marlboro substituted "gold" keeps the package design and coloration consistent. Over 90% of smokers recognized Marlboro Gold as a "light" product and thus, in the minds of many consumers, safer.



SECTION 21: IQOS USA

In January 2018, based upon the recommendation of a scientific advisory panel, the United States Federal Drug Administration declined Philip Morris's application to sell IQOS in the United States. In April 2019, IQOS was authorized by the FDA to enter the U.S. market, but the agency has not yet authorized it to be marketed as a modified risk tobacco product.

In its approval, the FDA described that it planned to place: *"stringent marketing restrictions on the products in an effort to prevent youth access and exposure."* The agency indicated that: *"We'll be keeping a close watch on the marketplace, including how the company is marketing these products, and will take action as necessary to ensure the continued sale of these products in the U.S. remains appropriate and make certain that the company complies with the agency's marketing restrictions to prevent youth access and exposure."*

PMI CEO Andre Calantzopoulos said. *"After much deliberation, the companies have agreed to focus on launching IQOS in the U.S. as part of their mutual interest to achieve a smoke-free future."* (ref Wu) This reveals a strategy of moving away from the much criticized e-cigarette product (JUUL) to emphasize promotion of their heated tobacco product (IQOS) in the American market.

IQOS launched in Atlanta, Georgia, in September 2019 with a new retail store announced at Lenox Square in Buckhead, an upscale shopping mall with 200 stores, including Bloomingdales, Neiman Marcus, and Macy's. In addition, the company announced that it plans to offer IQOS in 500 Atlanta area retail stores, including Circle K, Murphy USA, QuikTrip, RaceTrac, Speedway, and other retailers. Pop up called *"IQOS Corners"* were planned within a number of Atlanta stores.

In November 2019, IQOS launched in its second U.S. location, Richmond, Virginia. The storefront is located in Carytown described as a *"Mile of Style"* in Richmond's museum district. The announced plan specifies 170 retail locations supplemented by pop up kiosks at various Richmond locations

In February 2020, Altria announced that its third test market would launch in Charlotte, North Carolina in April. (ref. Blackwell) Howard Willard, Altria's Chairman and Chief Executive Officer gave some insights into the early US sales experience: *"More than half of smokers who have tried the product have purchased it. About half of the purchasers are 21 to 39 years old, and nearly three-quarters of purchasers are male."*

In a USA Today Interview in January 2020, discussing youth access, Altria spokesman David Sutton said that IQOS in will be sold in the US only: *"in dedicated retail stores where workers will only sell the product to smokers."* (ref USA Today) Based upon actual practice in Atlanta and Richmond, this is clearly inaccurate. Long experience shows that tobacco sales in convenience stores, gas stations, and the likes is notably porous when it comes to underage sales.

It should be noted that European PMI executives use the US FDA authorization as a lobbying tool to oppose regulatory efforts. On February 14, 2020, PMI's Armenia's General Manager Natalia Mayorova issued a press release highlighting FDA authorization for the American Market. *"IQOS has been authorized by US FDA – a reputable regulator of food and medicines - for sale in the US because , as said by FDA, it is appropriate for the protection of the public health."* (ref. Mayorova).



Atlanta introduction

Altria introduced IQOS in Atlanta last fall. The company describes Atlanta as a dynamic, tech-forward market that gives Altria the opportunity to responsibly and effectively introduce the new IQOS product to adult smokers. Officials described Atlanta as a "good fit" for IQOS because there are at least several hundred thousand adult smokers, many of them Marlboro consumers, which will allow the company to learn how to best introduce adult smokers to IQOS so they can fully switch to the product. To support the introduction of IQOS, PM USA has numerous retail touch points throughout Atlanta, including an IQOS store at Lenox Square and Mall of Georgia; IQOS mobile retail units; and HeatStick availability in approximately 500 retail trade partner stores, including **Circle K**, **Murphy USA**, **QuikTrip**, **RaceTrac**, **Speedway** and select others. Many of these chains are high-ranking companies in **CSP's Top 202 list** of c-store chains by store count.

Richmond introduction

Weeks after the Atlanta introduction, Altria began an introductory rollout in its hometown of Richmond. Altria has a sizable employee base in the Richmond area and deep connections with the community that could accelerate early adoption of IQOS, the company said. To support the introduction of IQOS, PM USA has numerous retail touch points throughout Richmond, including an IQOS store in Carytown, Va.; IQOS mobile retail units; and HeatStick availability in approximately 170 retail trade partner stores, including **Sheetz**, **Wawa**, **7-Eleven** and select others.

At its IQOS-focused retail outlets, employees verify consumers are 21 or older prior to entering and must confirm that they are smokers to receive a guided trial or purchase the product. In IQOS stores, adult smokers are given the opportunity to experience the product firsthand with an IQOS expert who has received in-depth training to walk adult smokers through the product, explain the product features and benefits and encourage the adult smoker to completely switch to IQOS, which is the company's ultimate goal. Employees will also provide post-purchase support, all while taking steps to minimize reach to unintended audiences, consistent with the FDA marketing order and requirements, the company said.

The FDA has reviewed Altria's IQOS marketing plans and will monitor them going forward through extensive post-market reporting that PM USA will provide to the FDA as required in the PMTA marketing order.

<https://www.cspdailynews.com/tobacco/altria-reveals-more-marketing-plans-iqos#page=3>

IQOS Richmond store



IQOS Atlanta store



The first IQOS store in the United States scheduled to open in September 2019.



Co-branding of IQOS and Marlboro filmed at Atlanta store and on IQOS USA website.



<https://www.youtube.com/watch?v=yJheGo76w0I>

USA website (getiqos.com)

A USA marketing site has been established at getiqos.com. SRITA identified the first US IQOS advertisement in the September issue of Wired Magazine which was released in mid-August 2019. We will continue to collect and post USA IQOS marketing as it evolves. As IQOS has been authorized as a cigarette equivalent, the brand should not be advertised on radio or television and must be limited to those flavors permitted for cigarettes (tobacco and menthol).

IQOS USA launch ad

Front page of the new USA website.



From the IQOS USA Website (getiqos.com).





MEET IQOS®

Learn about IQOS® and how it's different.



MYIQOS

[Review your profile and user subscription preferences](#)

USA IQOS emails to Customers:

Altria e-mails to potential customers of its newly opened IQOS store in Atlanta (September 27, 2019) and the arrival of its mobile IQOS store in Little Five Points which is described as located in “Atlanta’s hippest neighborhood.” (December 3, 2019).



Trinkets & Trash (<https://www.trinketsandtrash.org>)

Introducing “IQOS Corners” – “designated areas in convenience stores . . making it a little easier to locate all things IQOS.”



The email advertisement (left) promoting both IQOS and Marlboro cigarettes reveals Altria's intentions as it enters the US market. By simultaneously advertising both IQOS and Marlboro cigarettes Altria highlights that IQOS is more about retaining the smoker as a customer rather than improving smoker's health. Co-branding of IQOS and Marlboro is achieved though naming its IQOS HEETs "Made by Marlboro." It should be pointed out that Marlboro is a brand name and not a manufacturing entity, the company behind both brands is Altria (Philip Morris USA).



Trinkets & Trash (<https://www.trinketsandtrash.org>)

From: IQOS® - sign-up@iqos.com [mailto:sign-up@iqos.com]
Date: Wed, Oct 2, 2019 at 12:30 PM
Subject: Thanks for joining the IQOS® community
To:

If you are experiencing the message below, please contact us at 1-877-837-7000.
Because things in your inbox should not be sign-up@iqos.com, we are sending you this message. Being sent it guarantees you did not tell us you changed your email in our database (or that there was a database issue). This email is intended to provide you with information. Don't forget to unsubscribe if you wish.

WARNING: This product contains nicotine. Nicotine is an addictive chemical.

IQOS®

SUPREME CIGARETTE'S WARNING: Smoking Causes Lung Cancer, Heart Disease, Emphysema, And May Complicate Pregnancy.

WELCOME TO IQOS®

Thanks for signing up with IQOS®. We'll continue to update you with news and information about

From 800S > go.ashleyphillipsystems.com
 Date: Fri, Oct 11, 2019 at 11:08 AM
 Subject: Save yourself a trip - order online today!
 To:

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 Copyright © 2019 by the manufacturer. All rights reserved.
 No part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, photocopying, recording, or by any information storage and retrieval system, without prior written permission from the manufacturer.

WARNING: This product contains nicotine. Nicotine is an addictive chemical.




DIRECTOR GENERAL'S WARNING: Smoking Causes Lung Cancer, Heart Disease, Emphysema, And May Complicate Pregnancy.





The website you are now looking at is a safe and secure place for you to order your IQOS products online today. You can find out more about IQOS products today.



© 2019 IQOS Inc. All rights reserved.

[illegible]

More to enjoy with less odor
 1 cigarette

IQOS: you enjoy the pleasure, we don't.
 Enjoy the IQOS tobacco-free cigarette system.

See Page 26, 2018 at 12:00 PM

There are no tobacco or nicotine ingredients in the IQOS system.
 However, the IQOS system does contain tobacco and nicotine in the tobacco-free cigarette.
 The small amount of tobacco in the cigarette is not a health hazard and is not a health risk. The small amount of tobacco in the cigarette is not a health hazard and is not a health risk.
 The small amount of tobacco in the cigarette is not a health hazard and is not a health risk.

WARNING: This product contains nicotine. Nicotine is an addictive chemical.

IQOS®



Smoking cessation is important. Smoking causes lung cancer, heart disease, emphysema, and may complicate pregnancy.



Enjoy tobacco without wearing it.



For purposes of trademark registration, IQOS® is a trademark of Philip Morris Inc. and its subsidiaries. The IQOS system is a trademark of Philip Morris Inc. and its subsidiaries. The IQOS system is a trademark of Philip Morris Inc. and its subsidiaries.

IQOS emails to potential US customers from the website of art director Jake Starr who created them for the Leo Burnett Agency. (<http://www.jake-starr.com/iqos>)



IQOS Advertising Examples Submitted to the US FDA as part of its Modified Risk Tobacco Product Application. (June 22, 2017) (<https://www.fda.gov/tobacco-products/advertising-and-promotion/philip-morris-products-sa-modified-risk-tobacco-product-mrtp-applications>)

The samples submitted by PMI/Altria to the US FDA depicted conservatively dressed, mature models. The choice of models and black and white coloration and the relatively sedate setting and poses differs notably from the typical global promotion of IQOS.





IQOS® - HOW IT'S DIFFERENT

It's electronic – but not an electronic cigarette.
Unlike e-cigarette products that heat fluid into a vapor, IQOS heats the real tobacco in Marlboro HeatSticks™, releasing smooth tobacco flavor.

Real tobacco – without the fire or ash.
IQOS delivers a clean, real tobacco experience. It heats the tobacco – but doesn't burn it – producing no ash and less odor.



IMPORTANT WARNING:
- It has not been demonstrated that switching to the IQOS system reduces the risk of developing tobacco-related diseases compared to smoking conventional cigarettes.
- HeatSticks™ contain nicotine, which is addictive.
- Using the IQOS system can harm your health.

Marlboro



Marlboro

IMPORTANT WARNING:
- It has not been demonstrated that switching to the IQOS system reduces the risk of developing tobacco-related diseases compared to smoking conventional cigarettes.
- HeatSticks™ contain nicotine, which is addictive.
- Using the IQOS system can harm your health.

The home page of the IQOS USA webpage (getiiqos.com) prominently warns of the risks of nicotine addiction, as mandated by law. It also appears to use a Surgeon General's warning for marketing purposes. Instead of a rotating warning the 4 required warnings, as required by law, it uses only the text warning: "Quitting Smoking Now Greatly Reduces Serious Risks to Your Health." Consumers could easily conclude that the US Surgeon General endorses IQOS for purposes of tobacco cessation.



The 4 Surgeon General required on all cigarette packs in the US since 1984.



From PMI 4th Quarter 2019 Report



From PMI 4th Quarter 2019 Report



SECTION 22: NOTES ON METHODS AND STUDY LIMITATIONS

Language Translation:

Non-English language websites, social media postings, and job solicitations were translated using Google translate (<https://translate.google.com>).

Access to Geolocated Accounts

IQOS has a number of country-specific official websites and social media sites that are geo-fenced, i.e., they can be viewed only by a person within the country. This was overcome by using ExpressVPN to access each country's website (e.g., Japan, Colombia, Ukraine, Italy, New Zealand, South Africa). From the website, we were then able to access the official IQOS social media sites (Instagram, Twitter, and Facebook). From the IQOS websites, we collected information on product launches, store openings, discounts, and other incentives, IQOS brand affiliations, and collaborations, as well as able to access IQOS's user community "IQOSPHERE."

Many IQOS websites require visitors to attest that they are of legal age to use tobacco products in the country. These age gates, including that of the new USA IQOS site (getiqos.com), are ineffective in that an underage individual can simply click through.

Interviews with IQOS brand ambassadors and influencers to query about their roles:

One of our primary methods involved creating Instagram accounts to interact with participants on IQOS-related accounts. For example, one account was described as a 24-year-old female Canadian model who graduated from an Italian university. This was chosen as IQOS is available in both Canada and Italy, it allowed us to communicate in English, and Italian IQOS users have a large community presence on Instagram. Depending on our questions for others, we often used this account to pose as an aspiring IQOS Brand Ambassador to find out more about the job. In order to learn about Instagram-related jobs, the officiality of accounts, and other topics of investigation, we direct messaged many IQOS users and several larger community accounts to find out more information. For credibility, we gained followers by following others, posting lifestyle content and photoshopped IQOS photos, and tagging large IQOS accounts that repost user content.

We used our other account, one on which we tried to appear to be a Japanese IQOS user, primarily to view the @iqos_jp account. In order for the account to accept us as a follower, we registered as an IQOS user with a Japanese ID we found online and the pack code from a carton of Marlboro HeatSticks which we bought via eBay. In order to determine the age and company affiliation of IQOS users and coaches, we looked for birthday posts on Instagram and Facebook, as well as job descriptions on LinkedIn.

Networking with PMI employees

To network with PMI employees, a LinkedIn profile was created and friend requests were sent to upwards of 100 PMI employees across many different countries. A typical message sent was: *"I'm considering going back to Philip Morris, and I have a few questions if you don't mind."* These conversations helped to illuminate the roles of coaches versus brand ambassadors in various countries. We also scoured Instagram, Facebook, and VK to trace specific coaches (usually found through LinkedIn) to their teams. Some hashtags that were especially helpful in finding these teams include #iqosclub and #iqosteam.

IQOS Job Listings

Job listings were collected from job aggregator websites infojobs.net, mipleo.com, neuvo.es, ejobs.ro, monster.com, indeed.com, and jooble.org, as well as on these websites' country-specific affiliates. They were also found on the websites of the job organizations and temp agencies Page Personnel, Grupo TEMA, and Adecco. They were located using both internal search bars and Google's "site:" search operator. Job listings for positions like these are sometimes found on social media like Facebook and Instagram.

Events:

Events were found on a variety of websites. Some were searched for on Google by translating search terms into different languages; this method was useful for finding events that had been reported on by news organizations or magazines. Others were found through the "news" section on IQOS official websites, when researchers saw Instagram photos, posted by event planners (e.g. theBrunchAffair, Geometria), influencers and other attendees, which were often tagged with IQOS-related hashtags or reposted by larger IQOS-related content aggregators like @iqos_friends. Similarly, some events were found by viewing videos of the events on Youtube and Vimeo. While the events themselves are exclusive, they are promoted across social media and can be easily found by outside viewers.

Magazines:

Articles were located by searching the websites of major Ukrainian magazines for mentions of IQOS and categorizing based on the content of the article. The presence of IQOS advertising in Ukrainian magazines was discovered through the Instagram of PINK Magazine.

Limitations:

While this white paper provides a comprehensive picture of IQOS Global marketing through January 2020, it is certainly not exhaustive. We acknowledge that many other events, social media channels, influencer/brand ambassador programs, point of sale promotions, etc. may well exist for IQOS that our research did not uncover. Indeed, over the 10 months of this study we continually discovered new IQOS promotions and, despite the impressive scope of what we uncovered, we suspect that much more IQOS promotion may be lurking in the corners of the internet and offline.

A particular area of limited visibility is what IQOS salespeople (coaches and brand ambassadors) say to potential customers. While PMI specifies guidelines for their employees, we strongly suspect that one-to-one and small group marketing conversations routinely transgress boundaries regarding the healthfulness of IQOS and its efficacy in achieving smoking cessation. Even adhering to the PMI party line on these important issues strays far from what is supportable by the scientific evidence.

Despite these limitations, we believe that the observations made in this work is effective in portraying the far-reaching and all-encompassing nature of IQOS promotion by PMI.

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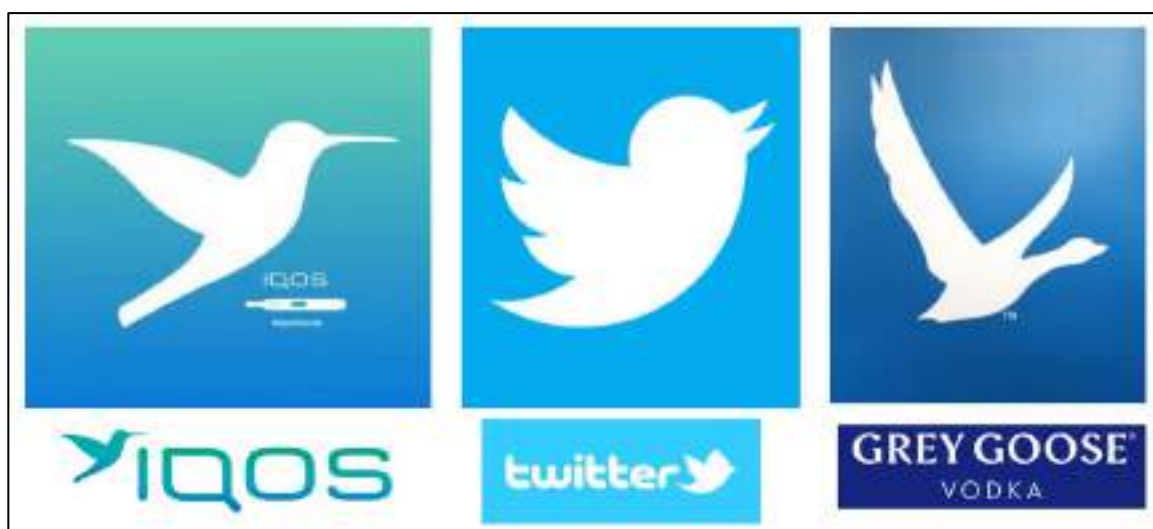
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Supplemental Table: IQOS Events 2015 – August 2019. This list of 270 events provides a representative sampling , but is almost certainly incomplete.

Supplemental Table 1: Worldwide IQOS events from 2015 to August 2019

Year	Event	Sub-Type (e.g. concert)	Country
2019	Petoor Spring/Summer collection show	Art installation /Show	Armenia
2019	Milan Design Week 2019	Art installation /Show	Italy
2019	Miko Galere 25th Anniversary	Art installation /Show	Malaysia
2019	Unzip Your Mind	Art installation /Show	Romania
2019	Viva, We Love Flamenco 2019	Art installation /Show	Spain
2019	Okuda San Miguel Special Project by IQOS	Art installation /Show	Spain
2019	Street Mag Show Hannover	Car show	Germany
2019	DISQVR Lounge at Retro Havoc	Car show	Malaysia
2019	Cannes Lions Festival (IQOS space, programme of events, open mic)	Communications Festival	France
2019	IQOS at Carnaval de Barranquilla	Cultural Festivals	Colombia
2019	IQOS Lounge u hotelu Thermal (?), Karlovy Vary Film Festival	Film Festival	Czech Republic
2019	IQOS booth and photo-op	Film Festival	Romania
2019	ShortsUp Film Festival and Picnic	Film Festival	Romania
2019	Bocao Food Fest 2019	Food Fair	Dominican Republic
2019	Tiffin Food Court	Food Fair	Malaysia
2019	Yerevan Wine Days	Food& Wine Festival	Armenia
2019	Booth at Vinitaly	Food& Wine Festival	Italy
2019	IQOS Booth at ZeBrush Makeup show	Make-up Event	Ukraine
2019	La Solar Fest	Music Festival	Colombia
2019	IQOS at Festival Estereo Picnic	Music Festival	Colombia
2019	IQOS at Beats 4 Love Festival	Music Festival	Czech Republic
2019	IQOS at TLV Student Day Event	Music Festival	Israel
2019	Klaipeda Castle Jazz Festival	Music Festival	Lithuania
2019	Beach Bike Fest	Music Festival	Lithuania
2019	Rusne Festival	Music Festival	Lithuania
2019	Bluzo Naktys (Blues Nights)	Music Festival	Lithuania

2019	Devilstone	Music Festival	Lithuania
2019	Galapagai	Music Festival	Lithuania
2019	Granatos Live	Music Festival	Lithuania
2019	Good Vibes Fest	Music Festival	Malaysia
2019	MerdekaRya Fest 2019	Music Festival	Malaysia
2019	Disqovr X Musika at The Gasket Alley	Music Festival	Malaysia
2019	Manic Mondo	Music Festival	Malaysia
2019	IQOS booth at Orange Warsaw Festival	Music Festival	Poland
2019	IQOS booth at Pol'and'Rock festival	Music Festival	Poland
2019	#belikeme IQOS booth at Forza ZU	Music Festival	Romania
2019	IQOS booth (?)	Music Festival	Romania
2019	Deep Forest Fest booth	Music Festival	Romania
2019	#belikeme IQOS booth at Open Air Blues Festival Brezoi	Music Festival	Romania
2019	Sunset Festival 2019	Music Festival	Romania
2019	Afterhills	Music Festival	Romania
2019	IQOS Smoke-Free Zone	Music Festival	Slovakia
2019	Euro Village	Music Festival	Israel
2019	Albania Launch Event	Party/Concert/Performance	Albania
2019	IQOS Party	Party/Concert/Performance	Armenia
2019	Berlin Opening Night	Party/Concert/Performance	Germany
2019	SLEEK x IQOS Valentine's Day Party	Party/Concert/Performance	Germany
2019	IQOS 3 Launch	Party/Concert/Performance	Israel
2019	IQOS & Marlboro Party	Party/Concert/Performance	Israel
2019	IQOS Motor Edition	Party/Concert/Performance	Italy
2019	IQOS Party	Party/Concert/Performance	Italy
2019	IQOS Night W/ Bob Sinclar	Party/Concert/Performance	Italy
2019	IQOS Party	Party/Concert/Performance	Italy
2019	IQOS Party for 10 million users	Party/Concert/Performance	Italy
2019	IQOS Party	Party/Concert/Performance	Italy
2019	IQOS Nippon celebration	Party/Concert/Performance	Japan
2019	Charlotte De Witte concert	Party/Concert/Performance	Malaysia

2019	Toko Kilat listening party and album launch	Party/Concert/Performance	Malaysia
2019	OBSCR X Gasket Alley "Ovation" Party	Party/Concert/Performance	Malaysia
2019	OBSCR X Gasket Alley "Ovation" Party	Party/Concert/Performance	Malaysia
2019	OBSCR X Gasket Alley "Ovation" Party	Party/Concert/Performance	Malaysia
2019	Pemacu Api Tour 2019 Press Conference	Party/Concert/Performance	Malaysia
2019	DISQOVR presents Southern Indie Night Out	Party/Concert/Performance	Malaysia
2019	Indieversary Tour	Party/Concert/Performance	Malaysia
2019	Airliftz Live at the Alley	Party/Concert/Performance	Malaysia
2019	Pemacu Api Tour 2019	Party/Concert/Performance	Malaysia
2019	Journey to the South Concert	Party/Concert/Performance	Malaysia
2019	Pemacu Api Tour 2019	Party/Concert/Performance	Malaysia
2019	Pemacu Api Tour 2019	Party/Concert/Performance	Malaysia
2019	IQOS 3 Launch	Party/Concert/Performance	Palestine
2019	Close To You	Party/Concert/Performance	Romania
2019	ART Me Like You Do	Party/Concert/Performance	Romania
2019	The Jungle Room	Party/Concert/Performance	Romania
2019	Creativity on the Move	Party/Concert/Performance	Romania
2019	Garden Sounds	Party/Concert/Performance	Romania
2019	Let's Summer	Party/Concert/Performance	Romania
2019	Lollipop Affair	Party/Concert/Performance	Romania
2019	Summer and the City	Party/Concert/Performance	Romania
2019	Retro Party	Party/Concert/Performance	Romania
2019	Join The Tribe beach party	Party/Concert/Performance	Romania
2019	Join The Tribe beach party	Party/Concert/Performance	Romania
2019	IQOS Third Birthday Party	Party/Concert/Performance	Russia
2019	IQOS 3 Launch	Party/Concert/Performance	Serbia
2019	IQOS Party	Party/Concert/Performance	Serbia
2019	IQOS VIP Party	Party/Concert/Performance	Serbia

2019	Cape Town Event	Party/Concert/ Performance	South Africa
2019	Johannesburg Event	Party/Concert/ Performance	South Africa
2019	IQOS 3 / Multi launch party Madrid	Party/Concert/ Performance	Spain
2019	IQOS 3 / Multi launch party Sevilla	Party/Concert/ Performance	Spain
2019	IQOS 3 / Multi launch party Gran Canaria	Party/Concert/ Performance	Spain (Canary Islands)
2019	Cosmopolitan 20 Years in Ukraine	Party/Concert/ Performance	Ukraine
2019	IQOS 3 Launch	Party/Concert/ Performance	United Kingdom
2019	Evento IQOS	Product Event	Colombia
2019	Speed Junkies 2019 Drift Showdown	Sports- Car rally	Malaysia
2019	Store at Italian Open	Sports-Tennis tournament	Italy
2019	Tudor Tennis Trophy (TTT)	Sports-Tennis tournament	Romania
2019	Italy Launch Event (Boutique)	Store Opening	Italy
2019	Launch event Parma	Store Opening	Italy
2019	Women Talks Hosted by IQOS	Talk/Awards	Armenia
2019	Opening of Red Point Terrace	Talk/Awards	Armenia
2019	IQOS 3 Launch	Talk/Awards	Bosnia and Herzegovina
2019	SLEEK and Sonja Gerhardt talk digital transformation	Talk/Awards	Germany
2019	Lola German Film Award	Talk/Awards	Germany
2019	Playboy Germany's Playmate of the Year Awards 2019	Talk/Awards	Germany
2019	IQOS Event	Talk/Awards	Israel
2019	Cosmoprof 2019 Brunelleschi Hairdressers	Talk/Awards	Italy
2019	Beauty Trends talk	Talk/Awards	Italy
2019	Beauty Trends talk for World Kissing Day	Talk/Awards	Italy
2019	Hiroshima Store 3rd Anniversary Celebration and Coffee Giveaway	Talk/Awards	Japan
2019	In-Store Mother's Day Events	Talk/Awards	Japan
2019	In-Store Father's Day Events	Talk/Awards	Japan
2019	Presentation of new flavors	Talk/Awards	Japan
2019	Kimono no yoru sake tasting session	Talk/Awards	Malaysia
2019	Folio Bar Opening	Talk/Awards	Malaysia

2019	Ramadan Iftar	Talk/Awards	Malaysia
2019	Public-Talk IQOS with Alexander Rogov	Talk/Awards	Russia
2019	Dentistry event	Talk/Awards	Russia
2019	Industry Disruption event	Talk/Awards	South Africa
2019	GQ 2019 Father's Day Event	Talk/Awards	South Africa
2019	An Evening of Shuffleboard	Talk/Awards	United Kingdom
2019	An Evening of Shuffleboard	Talk/Awards	United Kingdom
2018	IQOS World project at Palermo Capital of Culture 2018	Art installation /Show	Italy
2018	Kasta Morelly Fashion Week	Art installation /Show	Romania
2018	Fiesta del Cine Edition 2	Film Festival	Romania
2018	Summer Sonic Music Festival	Music Festival	Japan
2018	IQOS sponsored event (Belgrade Beer Fest Concert)	Music Festival	Serbia
2018	Absolut Carousel by Triangulum	Party/Concert/Performance	Armenia
2018	IQOS 3 Launch	Party/Concert/Performance	Bulgaria
2018	IQOS 3 Launch	Party/Concert/Performance	Colombia
2018	Trinity Party	Party/Concert/Performance	Czech Republic
2018	IQOS 3 Launch	Party/Concert/Performance	Dominican Republic
2018	IQOS 3 Launch Event	Party/Concert/Performance	Germany
2018	IQOS 3 Preview Event	Party/Concert/Performance	Greece
2018	IQOS Launch party/Event	Party/Concert/Performance	Italy
2018	Pink Party	Party/Concert/Performance	Italy
2018	IQOS Event	Party/Concert/Performance	Italy
2018	Launch Event Milan (private event)	Party/Concert/Performance	Italy
2018	IQOS 3 Presentation	Party/Concert/Performance	Japan
2018	IQOS Christmas Party	Party/Concert/Performance	Poland
2018	Love Games	Party/Concert/Performance	Romania
2018	Girls Do It Better	Party/Concert/Performance	Romania
2018	URBAN Bloom	Party/Concert/Performance	Romania
2018	Speed it up	Party/Concert/Performance	Romania

2018	Let's Play Outside	Party/Concert/ Performance	Romania
2018	Intense Pop-Up Party	Party/Concert/ Performance	Romania
2018	Summer and the City	Party/Concert/ Performance	Romania
2018	JoinTheTribe	Party/Concert/ Performance	Romania
2018	Retro Party	Party/Concert/ Performance	Romania
2018	Stick With Your Tribe	Party/Concert/ Performance	Romania
2018	IQOS sponsored sushi party	Party/Concert/ Performance	Romania
2018	Endless Summer	Party/Concert/ Performance	Romania
2018	#PlayItCool at Qreator by IQOS	Party/Concert/ Performance	Romania
2018	FallForYou	Party/Concert/ Performance	Romania
2018	White Noise	Party/Concert/ Performance	Romania
2018	3 Reasons Why Anniversary Party	Party/Concert/ Performance	Romania
2018	IQOS 3 Closed presentation	Party/Concert/ Performance	Russia
2018	IQOS 3 Years Party	Party/Concert/ Performance	Russia
2018	IQOS 3 Media Launch	Party/Concert/ Performance	South Africa
2018	IQOS Club	Party/Concert/ Performance	Spain (Canary Islands)
2018	IQOS Club	Party/Concert/ Performance	Spain (Canary Islands)
2018	IQOS 3 Launch	Party/Concert/ Performance	Ukraine
2018	Bazaar Best Dressed 2018 Awards Ceremony	Party/Concert/ Performance	Ukraine
2018	IQOS Boutique Opening	Store Opening	Armenia
2018	IQOS Boutique Opening	Store Opening	Germany
2018	Kamoblog Night Life Awards 2018	Talk/Awards	Armenia
2018	IQOS & Karim Rashid Lounge	Talk/Awards	Czech Republic
2018	IQOS Event at Tender Japanese Restaurant	Talk/Awards	Italy
2018	Umeda Store 3rd Anniversary Celebration and Coffee Giveaway	Talk/Awards	Japan
2018	Fabulous Muses Wardrobe Resale	Talk/Awards	Romania
2018	IQOS X Alexander Terekhov	Talk/Awards	Russia
2018	Co_Lab Café by iQOS	Talk/Awards	Spain

2017	Alex Braga installation "Intangible"	Art installation /Show	Italy
2017	Thierry Ledé x IQOS portraits at Mia Photo Fair 2017	Art installation /Show	Italy
2017	Film screen at Shut Up Beach: Grandfather unleashed	Art installation /Show	Romania
2017	Film screen at Shut Up Beach: Good and crazy mothers	Art installation /Show	Romania
2017	Mercedes-Benz Fashion Day St. Petersburg	Art installation /Show	Russia
2017	Private showing of the play "Black Russian"	Art installation /Show	Russia
2017	IQOS Booth	Summer Festival	Russia
2017	IQOS Booth	Food Fair	Russia
2017	IQOS sponsored event	Food Fair	Ukraine
2017	Product launch	Food Fair	Russia
2017	IQOS at Festival Estereo Picnic	Music Festival	Colombia
2017	IQOS sponsored event (Belgrade Beer Fest Concert)	Music Festival	Serbia
2017	Bulgaria Launch Event, "Smoke Free Future"	Party/Concert/ Performance	Bulgaria
2017	Playboy Colombia Launch	Party/Concert/ Performance	Colombia
2017	All White Party	Party/Concert/ Performance	Curaçao
2017	IQOS Night	Party/Concert/ Performance	Italy
2017	IQOS Lounge Opening Party	Party/Concert/ Performance	Italy
2017	IQOS Lounge Riccione Party	Party/Concert/ Performance	Italy
2017	IQOS Lounge Riccione Party	Party/Concert/ Performance	Italy
2017	IQOS Lounge Riccione Party	Party/Concert/ Performance	Italy
2017	Follower-Only Halloween- Themed Event	Party/Concert/ Performance	Japan
2017	The Brunch Affair presents Get A Room	Party/Concert/ Performance	Romania
2017	The Brunch Affair presents #GirlsOnTop	Party/Concert/ Performance	Romania
2017	The Brunch Affair presents #GlitterOnMe	Party/Concert/ Performance	Romania
2017	The Brunch Affair presents #ByTheLake	Party/Concert/ Performance	Romania
2017	The Brunch Affair presents #ByThePool	Party/Concert/ Performance	Romania

2017	The Brunch Affair presents #ByTheSea	Party/Concert/Performance	Romania
2017	The Black Sea Must Baptize Me	Party/Concert/Performance	Romania
2017	Music Is The Answer	Party/Concert/Performance	Romania
2017	High Point Private Rooftop Party	Party/Concert/Performance	Romania
2017	That 70's Vibe	Party/Concert/Performance	Romania
2017	And you, what would you do for love	Party/Concert/Performance	Romania
2017	Music Is The Answer	Party/Concert/Performance	Romania
2017	2nd #AnniversaryParty	Party/Concert/Performance	Romania
2017	New Year's Affair	Party/Concert/Performance	Romania
2017	The Millennial Aristo Party: The Map Far East Edition	Party/Concert/Performance	Romania
2017	"Major opening of your spring"	Party/Concert/Performance	Russia
2017	Opening of the season	Party/Concert/Performance	Russia
2017	"Leningrad" Concert	Party/Concert/Performance	Russia
2017	Summer season opening	Party/Concert/Performance	Russia
2017	IQOS Booth	Party/Concert/Performance	Russia
2017	IQOS Zone at Cosmopolitan Summer Party	Party/Concert/Performance	Russia
2017	IQOS Presentation	Party/Concert/Performance	Spain
2017	II IQOS Club	Party/Concert/Performance	Spain (Canary Islands)
2017	Elle Ukraine summer party	Party/Concert/Performance	Ukraine
2017	IQOS Winterlude Event	Sports-Skiing, winter festival	Italy
2017	IQOS Boutique opening	Store Opening	Russia
2017	IQOS Day Talk	Store Opening	Russia
2017	IQOS Boutique opening	Store Opening	Ukraine
2017	World No Tobacco Day cigarette trade-in	Talk/Awards	Canada
2017	Father's Day Event IQOS Store Ginza	Talk/Awards	Japan
2017	Chocolate Marriage tasting event	Talk/Awards	Japan
2017	ForbesLife Awards	Talk/Awards	Romania
2017	IQOS Presentation	Talk/Awards	Russia
2017	4th Annual Model of the Year Award Ceremony	Talk/Awards	Russia

2017	Creative evening with Esquire (play and concert)	Talk/Awards	Russia
2017	IQOS Press Brunch	Talk/Awards	Russia
2017	Meet & Greet Press Conference	Talk/Awards	Russia
2017	Closed presentation of the updated version of the device IQOS	Talk/Awards	Russia
2017	Meet & Greet with STEREOLETO festival organizers	Talk/Awards	Russia
2017	Selfie Masterclass with Nika Belotserkovskaya	Talk/Awards	Russia
2017	Launch of @iqos_ru	Talk/Awards	Russia
2017	Brand Ambassador Day	Talk/Awards	Russia
2017	IQOS Cinema Cocktail	Talk/Awards	Russia
2017	Literary readings by the Chief Editor of MAXIM magazine Alexander Malenkov	Talk/Awards	Russia
2017	The Gentleman's Cave	Talk/Awards	Switzerland
2016	Anything Butts Pavillion	Art installation /Show	Italy
2016	IQOS Booth	Art installation /Show	Ukraine
2016	IQOS Bucharest Launch	Party/Concert/Performance	Romania
2016	IQOS Lumimori Party	Party/Concert/Performance	Romania
2016	The Millennial Aristo Party: The Pink Oceans	Party/Concert/Performance	Romania
2016	Radio Aristocrats season six opening	Party/Concert/Performance	Russia
2016	Vogue Fashion's Night Out Party 2016	Party/Concert/Performance	Ukraine
2016	White Monday with Alexey Zalewski	Talk/Awards	Russia
2016	White Monday with Victor Anisimov	Talk/Awards	Russia
2016	Heat Friday	Talk/Awards	Russia
2016	White Monday with Serge Smolin and Serge Paye	Talk/Awards	Russia
2016	Heat Friday	Talk/Awards	Russia
2016	White Monday with Vladimir Nechiporuk	Talk/Awards	Russia
2016	White Monday with Valera Topal	Talk/Awards	Russia
2016	Heat Friday	Talk/Awards	Russia
2016	White Monday with Alexander Baraboshko	Talk/Awards	Russia

2016	White Monday with Vlad Nozdrachev	Talk/Awards	Russia
2016	White Monday with Sergey Didkovsky	Talk/Awards	Russia
2016	"It's All About Changes" talk	Talk/Awards	Russia
2016	White Monday with Tatiana Kiselchuk	Talk/Awards	Russia
2016	"Girls In Love" play	Talk/Awards	Russia
2016	Public Talk Marie Claire and IQOS	Talk/Awards	Russia
2016	"It's All About Changes" talk	Talk/Awards	Russia
2016	"It's All About Changes" talk	Talk/Awards	Russia
2016	IQOS Birthday with Jukebox Trio and Marie Claire	Talk/Awards	Russia
2016	"It's All About Changes" talk	Talk/Awards	Russia
2016	Information security seminar	Talk/Awards	Russia
2016	New Year Brunch with Sergey Minaev	Talk/Awards	Russia
2016	Playmate of the Year 2016 Ceremony	Talk/Awards	Ukraine
2016	IQOS Space	Talk/Awards	Ukraine
2015	PR Event Installation	Talk/Awards	Japan
NA	IQOS Experience	Party/Concert/Performance	Guatemala
NA	IQOS Lounge	Party/Concert/Performance	Italy