DIGITAL CULTURE OF THE REGULATED INDUSTRIES. FOCUS: TOBACCO SECTOR

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Abstract

Today the world is connected more than ever before and expectation is ½ of the global population to be digitalized till 2020 year. This remarkable development of internet technologies defines the way people live, including our work experiences, shopping attitudes and entertainment modes. Internet has defined corporate culture, as well. By tracking development of past, dominant and emerging codes and in the search-reach of proper consumer, companies nowadays have adopted digital marketing and trade strategies as one of the efficient ways for doing business. But does digital marketing work for all industries? There are sectors like pharmacy, alcohol and tobacco that are regulated and subjected to control due to implied business specifics. This article aims to review the digital culture of the regulated industries. Particular concentration is given on tobacco – cigarette sector. The paper will show a content analysis of the internet environment, by re-

viewing pro-smoking and anti-smoking activities, players, communication channels, level of marketing and most of all, the narrative and discourse across social medias, official web sites of enterprise, institutions and etc.

Keywords: marketing semiotics, digital culture codes, smoking, meaning

Understanding digital culture and context

Imagine that we search for associations representing today's modern living. Receiving in this search digitization and any forms composing it such as internet, computer, smart phone, online banking and etc. as most frequent top of mind answer, would not be a surprising result at all. Today, people and businesses live and function digitally as a result of an almost total global transformation brought about by digital technologies. It organizes and structures the lives of individuals and companies, making our being and development dependent on digitization. We see digitization in every aspect of the modern world (Gere 2008:13). This connection is present to such an extent and is so indispensable that, if we consider Maslow's pyramid and its update according to today's trends, many would not have any doubts to position internet/computer/smart phone directly below in the level of physiological needs.

Especially in economically developed countries, digitization is everywhere around us. Mass media, movies, music are produced and distributed digitally. Most professions are absolutely impossible without computers, internet and email, mobile phones, servers and rest forms of information technologies providing the (immediate) connection, creation of file documentation and database management/storage. Manufacturing is digitally organized, which is the means for mechanical control and monitoring. The surroundings are the same when one is in a supermarket, bank office, state institution, etc. All the job and service provisions go through digital technologies. The case is interesting with money and bank institution development. Its digital existence today is so changed and modernized that physical and juridical persons use and manage their money with no physical contact, instead just seeing the number displayed on a computer, tablet, smart phone. And there is no distrust or conflict with this in people' minds – digital technologies are incorporated in our lives to such a deep extent that we accept their existence with no conditions and thus feel calm in possessing our money by just seeing the number wrote out on the screen. It also worth highlighting the digital way of information availability and
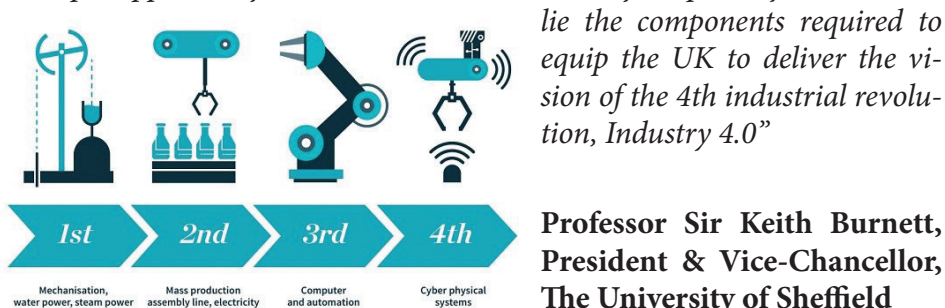
flow–a pure sign of global transformation. In these contemporary times, any kind of information is internet accessible, produced and searched for digitally (Bankov 2010). This is valid for education, employment, real estate, insurance, leisure and travel, entertainment and all other sectors we can think of (Gere 2008:13-4).

The facts in numbers

"The world is more connected than ever before", states Euromonitor International. According to the research agency, the number of internet users double during the last 7 years, reaching 3,2 billion globally in 2016. 43% of the population use internet in 2016 and based on forecasts, ½ are expected to be digitalized until 2020. This extreme development of internet services strengthens generational shifts in the way people live, work, shop and entertain today. Along with, it is observed a huge digital division between the developed and developing countries. As of 2016, 79% of consumers from the developed markets use internet against only 36% from the developing ones. However, the difference of each 43% is expected to be smaller in 2020 due to the anticipation that internet users from developing countries will augment 4 times more compared to developed countries.

More and more users connect to internet through devices from computer to smart phones, smart watches, refrigerators, and automobiles, reports the agency. This is the consumption leading to generational lifestyle shifts today. Speaking more generally, the world faces another technological revolution, called the Fourth industrial revolution. It is characterized with merging technologies that blur the lines between the physical, digital and biological spheres. Additional break-throughs in domains such as artificial intelligence, robotics, "the internet of things", 3D and self-driving automobiles will further accelerate the Fourth revolution.

"Between the geographies of the Sheffield City Region and Lancashire lies a unique opportunity. One which the UK economy desperately needs. Here lie the components required to equip the UK to deliver the vision of the 4th industrial revolution, Industry 4.0"

Professor Sir Keith Burnett, President & Vice-Chancellor, The University of Sheffield

„Increased connectivity transforms the commerce experience", states Euromonitor International. The internet connection brings a fundamental change across all levels of commerce. Today's digital consumers search for and buy commodities and services in a different manner from past generations. Future consumers envisage brands to interact with them digitally before, during and after purchase. As a result, online sales have been developing in various industries and this digital rupture won't stop. Following prognosis, 58% from all travel reservations will go over the digital trade channel till 2020. This share to the retail will be 11%, and for foodservice – 7%.

Based on this, the agency also infers that the "Unprecedented digital shifts creates need for market prioritization". The need for digital strategy is no more in question. Companies should be clear with the digital attractiveness across markets and to offer the best perspective for future development of digital marketing activities.

Historically speaking, the last 40 years have been times of globalization and domination of free market capitalism. These are the times also of techno-science influence, communication technologies and information proliferation. Digital technologies form the basis for this new world set. Particularly, the computerization of bank institutions, international currency exchange and trade has greatly supported the progress of globalization and financial liberalization. An essential feature of these new developments is the pace at which they occur. In combination with other achievements, digital technologies produce outcomes in extremely short duration. Digital technologies on the other hand, and digitization they result in, do not stop progressing in a very fast pace which make us witness to the huge technological constant changes and novelties surrounding us (Gere 2008:14-5).

"This pervasion of digital technology through our lives is part of a broader set of phenomena", says Charlie Gere in his book "Digital Culture". The varied elements of digital culture we experience nowadays are a historical response of the modern capitalism while demands of the Second World War further brought these together. Experts define WWII as the catalyst for the emergence of modern electronic binary computing, and the Cold War as the context for its development. Technology has been a very important driver of today's digital cultural achievements, but not the only one. Other influential literature mentions and emphasizes this way the complex character of digitization is techno-scientific discourses about information and systems, avant-garde art practice, counter-cultural utopianism, critical theory and philosophy, and so on (Gere 2008:14-18-29).

If we try to generalize the result of digitization and created digital culture, then we could define it as:

"The annihilation of physical distance and the dissolution of material reality by virtual or telecommunication technologies, or the apparent end of the human and the rise of the so called post-human as a result of advances in cybernetics, robotics and research into consciousness and intelligence."

(Gere 2008:15)

Meaning of the term "digital"

In the narrative so far, the word "digital" was frequently mentioned and centered. Similarly, the importance of digitization to our lives should became obvious too, which certainly requires an understanding of the term "digital". On a technical language, "digital" is employed to signify data in the form of discrete elements. This determines the denotative meaning of the term. Due to dramatic progress of digital technologies, over the last 70 years, the word has become synonymous with technology as a whole, whereas it should mainly refer to computers. Because of this, other terms, "computer technologies" and "digital technologies" have become synonymous, too. Computers are digital machines because they deal with digital binary form, zeroes and ones. On the other hand, presuming all possible connotations with "digital", it signifies much more enriched meaning than the one deriving from the specific technical language – namely, discrete data or machines based on such data usage (Gere 2008:15; Oswald 2012:54-5).

"To speak of the digital is to call up, metonymically, the whole panoply of virtual simulacra, instantaneous communication, ubiquitous media and global connectivity that constitutes much of our contemporary experience. It is to allude to the vast range of applications and media forms that digital technology has made possible, including virtual reality, digital special effects, digital film, digital television, electronic music, computer games, multimedia, the Internet, the World Wide Web, digital telephony and Wireless Application Protocol (WAP), as well as the various cultural and artistic responses to the ubiquity of digital technology, such as Cyberpunk novels and films, Techno and post-pop music, the 'new typography', net.art and so on. It also evokes the whole world of wired capitalism dominated by high-tech companies such as Microsoft and Sony and the so-called 'dot. coms', companies based on the Internet, which, for a while, seemed to present the ideal model for twenty-first-century business, as well as, more generally, the ungraspable complex of corporate business which, enabled by high technology, operates on a global level and sometimes appears to wield

more power than nation states. It also suggests other digital phenomena, such as the new paradigms of computer-controlled and supposedly clean 'virtual war', or the computerization of genetic information as in endeavors such as the Human Genome Project, in which the transmission of inherited characteristics becomes a digital matter in itself. Thus the apparently simple term digital defines a complex set of phenomena."

(Gere 2008:15-6)

This definition allows us to think of the development of a distinctive digital culture. Peculiar for this culture is the use of high technology and virtual communication by group/s of people at a certain period in history, distinguishing them by earlier periods in which technology had not made for an up-to-date form of living (Gere 2008:16; Oswald 2012:54-5).

The scientific discourse about digital culture

According to Charlie Gere, the discourse of digital culture is motivated by two interconnected beliefs. The one claims that such a culture represents a decisive rupture with the earlier period, while the other advocates that digital culture derives from digital technology which is also a condition of its existence. Both viewpoints could be reckoned as true. Thus, the existence of a distinctive digital culture can be differentiated in parallel to previous cultures and has also been constructed purely by means of digital technologies. However, a more profound analysis and journey through the history of digitization would reveal that digital culture is neither new, nor its developments reliant on technological progress. In this light, Charlie Gere further suggests that digital technology is a product of the same culture rather than the opposite. This comes to infer that digitization encompasses a certain way of thinking and that any kind of technology and machinery is firstly a social achievement based on human mind, and after that a technical one as well. In the digital sense, this mode of thinking results in abstraction, codification, self-regulation, virtualization and programming that lead to digitization. These skills can be applied through writing by using the specific languages of programming. And "…inasmuch as language, written or spoken, is digital in that it deals with discrete elements, then almost all human culture may be said to be digital", concludes Gere (Gere 2008:17-8).

Digital communication of regulated industries

Creating attractive and innovative marketing campaigns is a challenging job. It requires a combination of science and art, while digital marketing and blooming social media in particular make it even more challeng-

ing. This is especially significant for highly regulated industries that should follow rules and bans in the varied processes of doing business, including trade and marketing communications. Marketers have to be familiar with respective regulative requirements in order to know what and how to communicate. They need to confront and deal with strong guidance coming from government, non-governmental organizations (NGOs) and industry associations when deciding on the possible communication approaches. This market environment assumes professionals from regulated businesses to be more creative, keen and game to venture into new marketing areas, the better to remain competitive and attractive to consumers. "Highly regulated brands must play by the rules when crafting marketing and advertising campaigns, but that doesn't mean they can't have fun while doing so", says Matthew Schwartz, a partner at Sullivan & Cromwell LLP (Schwartz 2016; Muehlenhaupt 2015)

To follow requirements is important, because the cost of non-compliance can be harmful not only to the corporate and brand image but can be expressed financially, too. Failure to comply with defined regulations can result in heavy fines and sanctions. For example, the tobacco company R.J. Reynolds was fined $20 million for marketing to young audiences, and advertisers not respecting the Federal Trade Commission (FTC) could end up paying a fine of $16,000 per day/ per commercial (Cannon 2014).

Defining regulated industries

In fact, there are regulations in all businesses in order to ensure that certain standards are followed for the good of people and nature. The difference, however, is that some sectors are much more controlled than others, and some are so new that regulations have been still establishing. According to Regulation Nation, the mostly controlled industries are those which have the deepest impact on people's lives and could cause the most potential harm. This suggests that health care and concomitant industries in this context like alcohol and tobacco should be the most heavily governed (Livini 2016).

Besides the aforementioned, other sectors under high regulation discussed in the literature are finance, public companies, petroleum and coal products manufacture, electric power generation, transmission and distribution, motor vehicle manufacture, scheduled air transportation, fishing, oil and gas extraction, and others. Based on a number of restrictions, the McLaughlin-Sherouse List ranks petroleum and coal products manufacture the first mostly regulated industry for 2014. In TOP 10 of the same list, tobacco industry does not present (Hatwal 2016).

So, according to the Cambridge Dictionary definition, a regulated industry is "a type of business that is controlled by government rules: This applies to workers in regulated industries, such as teaching or financial services". Another source, dictionary of All Business, defines the regulated industry as "industry that is regulated by government to a significant extent. Utility industries are excellent examples; their pricing, profits, and, sometimes, production methods are regulated by both federal and state governments."

Focus: Tobacco sector

Going further and narrowing the discourse to digital communication and business sector of regulation, rules and bans vary from industry to industry. In this regard, one may have digital marketing restrictions imposed while others may not (Schaefer 2016).

Concerning the tobacco industry and cigarettes in particular, restrictions span from product manufacture to product sale and marketing. Tobacco is regulated by governments, the World Health Organization (WHO), the European Union (EU), the US Food and Drug Administration (FDA) and others. One of the most important international conventions in the area is the WHO Framework Convention on Tobacco Control (FCTC), developed in response to the globalization of tobacco and in force since February 2005. To fight the demand for tobacco and encourage its reduction, FCTC controls price and tax measures, exposure to tobacco smoke, packaging and labelling of tobacco products, tobacco advertising, promotion and sponsorship, illicit trade, sales to and by minors, and other sensitive topics. The agreement has 168 signatories, among which the European Community, as well. This makes it one of the most widely spread treaties in the United Nations (UN) (WHO Framework Convention on Tobacco Control).

Article 13 from the FCTC scrutinize the Tobacco advertising, promotion and sponsorship. Point 2 states that:

"Each Party shall, in accordance with its constitution or constitutional principles, undertake a comprehensive ban of all tobacco advertising, promotion and sponsorship. This shall include, subject to the legal environment and technical means available to that Party, a comprehensive ban on cross-border advertising, promotion and sponsorship originating from its territory."

In the case of a party that is not in a position to undertake a comprehensive ban, it has to apply restrictions on all tobacco advertising, promotions and sponsorship. Besides, there is a minimum that each party has to assure, according to the article. A portion of it concerns digital communication, namely that parties should: "undertake a comprehensive ban or, in the case of a Party that is not in a position to undertake a comprehensive ban due to its constitution or constitutional principles, restrict tobacco advertising, promotion and sponsorship on radio, television, print media and, as appropriate, other media, such as the internet, within a period of five years".

The EU itself has two directives dedicated to tobacco control – the Tobacco Products Directive (TPD) and the Tobacco Advertising Directive (TAD). TPD governs the manufacture, presentation, and sale of tobacco and related products. In terms of cigarettes, it prohibits production of flavored cigarettes, small packages, limits ingredients (maximum of 10 mg. tar, 1 mg. nicotine and 10 mg. carbon monoxide per cigarette) and prohibits their labeling, requires 65% health warnings of the front and back of packages that combines picture, text and information on how to stop, allows EU countries to prohibit internet sales and others. TAD on the other hand, bans the cross-border tobacco advertising and sponsorship in all media except television (the latter had already been prohibited). Particularly, TAD bans print media, radio, internet and sponsorship of events involving several Member States, such as the Olympic Games and Formula One (EU European Commission Tobacco). In order to realize even stronger restrictions on tobacco, we could also mention plain packaging, which refers to a totally unbranded pack with only mentioned manufacturer of the product. Australia was the first country in the world that adopted the plain packaging. And following during this year have been France, United Kingdom and Ireland (Framework Convention Alliance).

Tobacco companies have very strict marketing regulations. Regarding internet, Google and Microsoft have policies that restrict or outlaw the promotion of tobacco products on their advertising networks, as does Facebook. Same applies to alcohol marketing, too (Cannon 2014).

Hence, discussing tobacco we determine that digital marketing is a forbidden territory. It is meaningful on the other hand law and other decrees interpretation, scope and depth of bans and existence of possible exceptions. In this regard hypothesis of the following content analysis of the cigarette sector in internet is that digital space is not a marketing tool for cigarettes. Below, it is upcoming to understand whether the given hypothesis would be passed or traversed.

Content analysis of the cigarette sector in internet

<u>Methodological notes</u>
This content-analysis is based on a Desk research of the internet space. Its major sources are the websites of corporate, state and non-governmental organizations, social media companies, K-Message[1] research findings and online shops information. In more details, it reviewed content of:

- 10 corporate websites;
- 15 governmental and non-governmental organizations;
- 3 social media companies: Facebook, YouTube and Wikipedia;
- Brand dedicated information of 40 global and strong local players: web site, Wikipedia or Facebook page;
- 30 online shops;
- Reached a number of pro-smoking as well as anti-smoking Facebook communities (only a few were reviewed due to joining being required).

The content-analysis was implemented in November 2016.

<u>Content analysis findings</u>
There are two established branches of activities: pro-smoking and anti-smoking activities. Actors in the pro-smoking branch are the business world, smokers, and pro-tobacco communities. Those in the anti-smoking branches are state institutions, NGOs, non-smokers, and anti-tobacco communities. The internet has been popularizing across all age groups, but youths still remain the most active users. Because of this, and speaking for digital marketing in particular, young people appear to be the main target group for both pro-smoking and anti-smoking activities. For doing business in general, youths are attractive because they are trendsetters, idea creators, the source of dominant and emerging codes, and contribute to future market success. While for the institutions in this context, youths are the most vulnerable consumer group to prevent from the health risk of tobacco products, supposing this will impact the future consumption, as well.

What are the most popular digital communication means?

As methodological notes suggest, the pro-smoking branch mainly employs corporate web sites, online shops, and social media. And for the anti-smoking one, web sites of state institutions and NGOs, and social medias once again. Keeping in mind this article's subject, we should focus on the

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[1] K-Message is an independent personal initiation of a digital marketing professional, dealing with regulated industries.

further development in content created across the so-called pro-smoking branch.
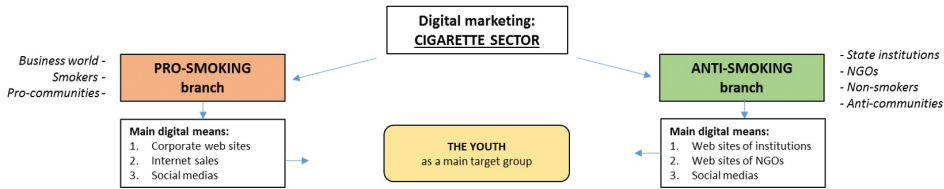
Graph 1. Digital marketing of cigarette sector: pro-smoking and anti-smoking branches

Corporate websites

Analysis of the global tobacco manufacturers, as well as regional and local players, uncovers two main codes that corporate digital communication is built upon. These are:

1. Responsibility
2. Sustainability

This communication is very typical for multinational companies that actively participate in debates and decisions concerning the whole cigarette industry. For instance, the corporate motto of Reynolds American is "Transforming Tobacco".

Concerning Responsibility, the discourse gravitates towards the following live questions:

- Regulations & Requirements
- Marketing
- Health
- Quitting smoking
- Youth prevention & informed choice of adults
- Illicit trade fights
- Research & Development (R&D)

We understand that corporations announce industry regulations and control imposed by institutions, state their respect and need in reducing harm effect of the tobacco products. For example, the position of Philip Morris International (PMI) is that the company supports the evidence for tobacco product regulation, following the principle of harm reduction. These companies share their principles and standards for marketing communications, conformable to regulative norms. According to this, minors cannot smoke and must be properly informed for the harm effects cigarettes cause. This is why cigarette and other tobacco products have health

warnings on their packages. Health warnings have become more and more rigorous by occupying more package space, adding pictures along with the textual warning or initiation of the total plain packaging. Advertisement itself has a lot of bans related to the place and mode of advertising. Because of this, we no longer see tobacco commercials broadcasted on TV, nor the faces of sportsmen or people under 25 advertising tobacco products.

Responsibility is also communicated through information sections about the chemical content of cigarettes, health consequences, addiction, and support of quit smoking, as well as links to organizations like WHO.

In today's consumer culture environment, R&D should be more important to the tobacco business than ever before. Manufactures are investing in new technologies and a new generation of products aimed at reducing the harmful effects of tobacco. Electronic cigarettes exemplify this development as an alternative solution to traditional cigarettes in this context. Part of R&D efforts is the support of medical researches, as well.

Concerning Sustainability, the discourse gravitates towards the following live questions:

- Nature & natural resources
- Climate changes
- Agriculture
- Corporate behavior
- Society & consumers

Sustainability is related directly to the above analyzed code, since it is another form of responsibility. Part of corporate culture is doing business in a way that protects and supports the preservation of nature, natural resources and the climate. Multinational manufacturers interact with farmers in order to establish proper practices, guarantee qualitative tobacco cultivation, control child's labor, etc. Corporate behavior manifested through transparency and followed highest standards of business leadership should be a typical feature of sustainability, as well. All these practices bring consumer care to society.

With respect to the commercial opportunities from which corporate sites from various product categories generally benefit, we find that digital reality differs for cigarettes. Graph 2, a visualization of the present content analysis, marks "Without advertising activities" as particular advertisements or product promotions were not found across web sites. With regards to age control, local and regional companies request user age in order to prohibit minors from entering the site. In this regard, and involving brand discourse, two groups are formed – the global/ big companies, and the regional/ local companies. Global companies lack overall brand

marketing introduction. Permitted information is limited and concerns market results, product categories, product characteristics, brand logos. The websites of regional/ local players, on the other hand, appear to aim for commercial success. In this group, product portfolios display pack designs, logos, imagery, and emotional messages.

According to the 2015 Merrill Lynch Global Tobacco report, the volume share for global companies (PMI, BAT, JTI and IMT) is 83% excluding China. And since these corporations dominate the market, the main conclusion from this sub-section reflects their digital behavior. Thus, digital marketing across corporate websites performs responsibility and harm reduction in particular. Companies with stronger performance in this direction would enhance consumer trust and loyalty to their products.
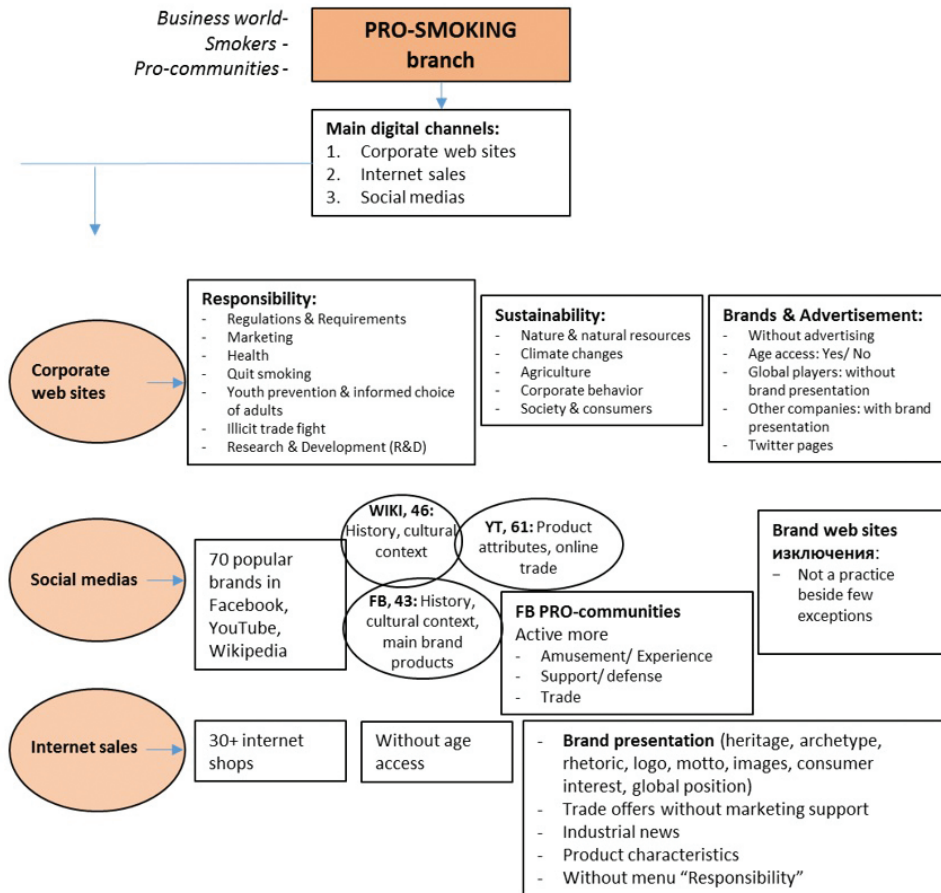
Graph 2. Pro-smoking branch communications

Social medias

K-Message traces the presentation of 70 popular cigarette brands on Facebook, YouTube and Wikipedia, which include Dunhill, Davidoff, Marlboro, L&M, Pall Mall, Camel, etc. According to research data collected in 2014, 43 brands out of 70 have a FB page, 61 have a YouTube channel, and 46 have a Wikipedia page. The assumption is that these are amateur activities. The narrative on Facebook relates to brand history, cultural context, and the main brand varieties.[2] Historical and cultural brand features prevail on Wikipedia, while YouTube content has a commercial purpose stemming from product and trade reviews.

It is interesting to know whether or not specific brands have dedicated web sites. Desk research shows that this is not a practice among cigarette brands, though a few exceptions that were detected. Marlboro, L&M, Parliament, Virginia Slims, and Gauloises and Winston have own official web sites in the USA, to which access is strictly controlled. Pall Mall and Camel also appear to have web sites but their access has been deactivated.

According to K-Message, pro-smoking groups have been more active than anti-smoking groups in digital space. This should be true assuming the nature of the two groups – the first is related to entertainment while the other is dedicated to fight and denial. There are a great number of pro-smoking communities in Facebook. Discourse there includes amusement (shared experience, photos of favorite brands, smoking moments, with a sexual context detected), smoker defense and support (smokers think that they have their rights, too) as well as commercial activity directing to online sales.

Internet sales

With key words "Cigarette online" and "Cigarette online sales", a Google Search finds over 30 internet shops selling cigarettes. There are almost no any shops with age control. This finding was not expected, bearing in mind the above specifics about regulations.

Across the shops there is brand presenting, and the scope in some outlets is richer while narrower in others. The richer brand narratives include typical marketing information, namely brand heritage, logo, motto, archetype, rhetoric, images, consumer interest, and global position. This analysis also includes commercial offers which are, however, not supported by certain marketing activities. Some sites are enriched by sections dedicated to industrial news. Expectedly, there is a detailed product presentation telling about cigarette format, strength, flavor, origin, and more. In contrast to the

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[2] For the online consumer rituals see Bankov 2014

corporate web sites, there is no "Responsibility" menu here. These findings allow us to say that internet shops are sites for primary marketing insofar as they present the brand, but do not engage in advertising campaigns.

Conclusion

Relying on the statements from digital culture and context described above, we infer that digital communications are a distinguishing feature of and condition for doing successful business in the present. This is due to the almost total global transformation of ways of life and business functioning by the digital technologies. With regards to regulated industries, and the tobacco sector in particular, there are strong marketing restrictions prohibiting almost all types of advertising channels, including the internet. The content analysis we performed, however, confirmed that cigarettes have not been advertised digitally in the way consumers know advertisement – namely, campaigns dedicated to new and existing products, supported by emotional visuals and promotions. This environment makes the communication of cigarettes sparing and very challenging. This is why, along with following the defined restrictions, marketers from the examined business sector should be more inventive in the way they communicate, and venture into new marketing areas in order to remain competitive and attractive to consumers.

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JTI: http://www.jti.com/

PMI: https://www.pmi.com/

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