Emotion in the ANDS (alternative nicotine delivery systems) market: Practice-theoretical insight into a volatile market

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ABSTRACT

Purpose: The alternative nicotine delivery systems (ANDS) market is complex, with a range of multi-national and multi-sector stakeholders competing for market share but also clashing ideologically as the evidence about the impact and side-effects of ANDS emerges. This empirical study examines the beliefs, goals and emotions at the heart of the practices performed by actors within the organisations behind the controversial commercial explosion of ANDS.

Design/methodology/approach: The study was designed to explore business strategies from the viewpoints of ANDS business stakeholders. A purposive, snowball sampling strategy was used to recruit ANDS stakeholders and gatekeepers among UK tobacco multinational and independent companies (n=28). Data were then analysed using a market-as-practices theoretical framework which specifically

frames market activities as practices, governed by teleoaffective structures, which seek to establish market procedures and rules, and which contribute to the taste regimes of a consumer practice.

Findings: Analysis has indicated that the ANDS market is highly contested and volatile, interwoven with competition, emotion and conflicting beliefs. In this context, there are commercial practices routinely undertaken in an attempt to align stakeholders' beliefs, which is seen as a core part of the corporate activities required within the marketplace. A key driver of these alignment activities is the profit end-goal, but this is in tension with beliefs, such as about doing 'right' and the objectivity of 'science'. Beliefs across this emergent market vary and are strongly held, and they lead to emotional positions, tying back to why aligning stakeholders is difficult. Analysis illuminates how the projects, end goals, emotions and beliefs which comprise the teleoaffective structures of various corporate practices in the ANDS market might inform the rules and norms of the market, shaping a taste regime experienced by consumers.

Limitations: The data and analysis cannot account for the beliefs and emotions of public health bodies, researchers, the media, policymakers and other stakeholders, but seek to illuminate how teleoaffectivity is a key part of market practices. Furthermore, the taste regimes of ANDS consumers cannot be observed in the data due to the focus on ANDS corporate actors. Finally, it is possible that conscious or unconscious biases in the interviewing style may have driven interviewees' responses and influenced data interpretation.

Implications: Tobacco control is one of the greatest success stories of public health; smoking prevalence has been driven down with a combination of popular empowerment and corporate containment. All this depended on a coherent and accepted evidence base. As this evidence base has fractured during the evolution of the ANDS market, so the stories have proliferated and progress has become less certain. The high emotion in the ANDS market indicates a tougher task for behaviour change activity targeting corporate actors.

Contribution: This paper speaks to the multiple calls in the behaviour change literature to tackle the intractable problems of the day through upstream measures including the restriction of corporate activity. The value is in the unique dataset and in the ambition of the project to unravel behind-the-scenes activities in the ANDS market. A practice-theoretical framework, although conceptually complex, is deployed to capture the complex intertwining of multiple practices and thus attempt to grasp the full significance of teleoaffectivity in the marketplace.

INTRODUCTION

This paper speaks to the multiple calls in the behaviour change literature to tackle the intractable problems of the day through upstream measures including the restriction of corporate activity (Hoek & Jones, 2011; Lefebvre, 2011). This is logical given the force of corporate marketing activities in shaping consumer tastes and choices on a cultural scale (Grier & Kumanyika, 2008; Shove & Pantzar, 2005; Shove & Southerton, 2000). In the UK, regulation of tobacco industry activity tipped the balance in favour of a cultural shift away from smoking. However, the case of alternative nicotine delivery systems (ANDS) is more complex.

For proponents of tobacco harm reduction (THR), and the UK in particular where tobacco harm reduction has been largely embraced (though this is approach is contested internationally), ANDS have been held up as a 'potential public health silver bullet' (Freeman, 2017, p. 19). Ostensibly, the motivations behind the companies marketing ANDS as reduced risk products are difficult to understand, given that some are also the multinational tobacco companies. But the situation is more complicated due to other companies marketing ANDS – independents with no tobacco industry (TI) ties – and these, either small local or larger national, independent stakeholders have very different interests and motivations (Bauld, Angus, de Andrade et al., 2016; Hasselbalch, 2016). Adding further complexity, is the way these products 'arrived' onto the market: ANDS were a consumer-driven revolution, so from the start the product was more aligned with the values of consumers or other stakeholders, and not with the tobacco industry who joined the market much later (Bauld et al., 2016; MacKenzie, Eckhardt & Prastyani, 2017). This suggests empowered consumers, rather than the passive victims of corporate marketing dependent on top-down protections depicted above. To complicate matters further still, in some countries there are now bans on the marketing of e-cigarettes (e.g. the UK, Finland, and other Member States via the EU Tobacco Products Directive) (Russell, Wainwright, & Tilson, 2016).

In view of this complexity, our understanding of the ANDS market needs to expand to make sense of the myriad strategic activities of the multiple stakeholders. For just the corporate stakeholders, for example, those activities include engaging with public health, research and evidence, policymakers and the media. Engagement and relationship building work is vital for corporate actors given that the evidence for long-term impacts on health is preliminary and often contradictory, although there is largely agreement that ANDS are less harmful than tobacco. Key opinion leaders, scientists, health bodies, regulators, journalists and advocates argue over which approach in THR is the 'right' approach (Sim & Mackie, 2014; McNeill, Brose, Calder et al., 2015). While there are many overlapping viewpoints, divided opinions are often put forward (in the media and in academic and practitioner journals, for example) as a crude pro-versus anti-tobacco harm reduction division (see for example Gornall, 2015). Corporate actors must navigate a pathway through the public discourse, and insodoing seek to steer and influence powerful others who can shape the market and regulatory landscape for their future business.

Doing business in the ANDS market is complex, and especially so given the overlaps and blurred lines between the new ANDS market and the old, much maligned Tobacco Industry (TI). Much of the tension and speculation around the TI's business interests in ANDS is informed by its deceptive past (Chapman, 2014; Gilmore & Hartwell, 2014; Grana, Benowitz, & Glantz, 2014; The Lancet, 2013). Some academics state that for industry this is about business not public health noting how transnational tobacco companies use the term tobacco harm reduction 'as opportunistic tactical adaptation to policy change rather than a genuine commitment to harm reduction' (Peeters & Gilmore, 2015, p.186). Evidence also suggests that British American Tobacco's (BAT) early interest in smokeless tobacco in Europe was steered by business interests and the possibility of generating an alternative form of tobacco use, particularly among young people (Peeters & Gilmore, 2013). However, others describe ANDS 'as a possible game-changing product that can end the use of combustible cigarettes once and for all' (Glynn

2014, p.165). For example, Philip Morris (the world's largest tobacco company) has pledged US$1 billion to a new Foundation for a Smoke-Free World headed by a former World Health Organization (WHO) executive and THR advocate (Meyer, 2017).

Despite the contested background to ANDS, the market is growing. Nielsen data for the UK gave the e-cigarettes category a retail sales value of £174.6m up to autumn 2016, an increase of 20% from the previous year, on sales volumes up 31% (Selwood, 2017). The global e-cigarette market was valued at US$11.92 billion with a growth rate of 31% in 2016 and the market is forecast to reach US$26 billion by 2020 (Technavio, 2016). North America has been the market leader since 2013. In 2015, its share was 40.92% followed by the UK and other countries in Western Europe where the market recorded revenues valued at US$2.71 billion (Technavio, 2016). Although news media coverage has grown over the past few years (e.g. Rooke & Amos, 2014), the battleground between the various stakeholders is largely invisible to the consumers but the UK's cultural taste for ANDS is growing, as demonstrated by the permeation on social media (Zhan, Liu, Li et al., 2017; Glowacki, Lazard & Wilcox, 2017; Lazard, Saffer, Wilcox et al., 2016) and the social and collective spaces for vaping communities (e.g. Burnley Football Club, 2013; Fisher, 2016; Williams, 2015).

In this context, analysis of the ANDS market requires careful consideration. Of particular interest is how the consumer taste for 'vaping' has developed and the role of corporate and other stakeholders in shaping this taste. A traditional conceptualisation of a market is based on the principles of exchange, and views consumers and marketers as rational actors each seeking the best exchange to meet their own ends. Rarely do marketing textbooks stray from this simple economic premise to talk about how the emotions and beliefs of actors within corporate organisations and among other stakeholders, which may not be explicit, act on consumer tastes and behaviour. By contrast, these texts do say a great deal about consumer emotions. This paper explores primary research with key actors in the TI and

independent organisations behind ANDS which suggests that their emotions, beliefs and end goals are paramount within commercial marketing activities, guiding – and in turn framed by – their overall business purpose. Importantly, this paper considers the implications of the emotions and beliefs of corporate and independent actors, and has chosen to do this via the theoretical mechanisms of 'teleoaffective structures' and 'taste regimes'; both emanating from a practice theoretical perspective. The social context has been identified in the tobacco control literature as significant for our understanding of how the practice of smoking takes hold and survives (Blue, Shove, Carmona, et al., 2016; Poland, Frohlich, Haines, et al., 2006), and various models of behaviour which emphasise social influences on behaviour have been used to analyse smoking behaviour (e.g. Corbett, 2001; Unger, Shakib, Gallaher, et al., 2006). However, much of this literature still places the consumer at the centre of analysis, rather than considers the consumer to be one part of a complex marketplace system of practices. Poland et al. (2006, p.61) go so far as to offer that 'the marketing practices of the tobacco industry are implicated' in our understanding of some of the ways consumers engage with the practices of tobacco use, but their reference to marketplace practices ends there. This paper places the marketplace practices making up the ANDS market at the centre of analysis. Specifically, we attempt to unravel the role of emotions, beliefs and end goals in the ANDS market, but also attempt to achieve a position that can take into consideration the very contested, political and emotive context of ANDS.

This research draws centrally on practice theory to help understand the role of corporate and independent stakeholder beliefs and emotions in the market system of practices. Practices are patterns of behaviour "which can be filled out by a multitude of single and often unique actions reproducing the practice… The single individual – as a bodily and mental agent – then acts as the 'carrier'… of a practice – and, in fact, of many different practices which need not be coordinated with one another" (Reckwitz, 2002, pp.249-50). As such, a practice approach stands "in opposition to individualist ontologies where social phenomena are viewed as products arising out of the actions and mental states of individuals, and

societism understood as the study of social facts, structures and systems that resist reduction to individual actors" (Araujo, Kjellberg & Spencer, 2008, p.6). Practice-theoretical enquiry involves a focus on the connections between material things, embodied skills, mental representations and their configuration (Shove & Pantzar, 2005), and less so about individuals' attitudes or actions in isolation. Importantly, this is not about entering into a 'blame game' – the "process of interaction among the players in these different worlds, as they combine or conflict and seek to pass the blame onto those in other worlds" (Hood, 2011, p. 22). Rather, this is an attempt to conceptualise the market.

The role of belief and emotion are important parts of what makes up a practice; seen to be 'of the practice' (Warde, 2005) rather than the individual. Indeed, although a range of different models exist (Reckwitz, 2002; Shove, Pantzar & Watson, 2012; Warde, 2005), practices can be understood as doings and sayings that are linked in three ways: "(1) through understandings, for example, of what to say and do; (2) through explicit rules, principles, precepts and instructions; and (3) through… *'teleoaffective' structures embracing ends, projects, tasks, purposes, beliefs, emotions and moods*" (Schatzki, 1996, p.89, emphasis added). In the light of this dissection, this research draws on practice theory to consider the teleoaffective structures in the constellation or nexus of practices which make up the ANDS market. These teleoaffective structures form part of powerful public discourses which are the basis of taste regimes, experienced as taste by consumers.

Following Callon (1998), who rejected the notion that markets are constructions populated by self-interested agents, we take a practice-theoretical understanding that markets can be conceptualised as a network of interrelated and inseparable practices; those of the producers, intermediaries and consumers but also policymakers, advocates, academics and media. Each practice impacts the other and no activity is outside the system. This system of practices has been called a constellation of practices. Schatzki explains:

> "Practices – organised manifolds of doings and sayings – connect to material arrangements – … to form practice-arrangement bundles. Such bundles, in turn, connect to other bundles to form wider constellations of practices and arrangements. Social life transpires within these bundles and constellations…" (Schatzki, 2017, p.133).

Elsewhere, Schatzki (2005) writes that organizations are bundles of practices comprising a variety of types of practice and that each bundle comprises a set of activities, routines and material arrangements that identify them as autonomous practices as well as allowing them to coordinate other bundles inside and outside the purview of the organization (Araujo et al., 2008).

Understood in this way, the teleoaffective structures embedded in commercial marketing practices are connected to those in consumer practices through relationships between elements across the constellation of practices which make up the market system. Practices within the constellation inform each other. That is to say that, drawing on Giddens' theory of structuration (1984), what is at the heart of marketing can neither be considered the 'demands' or 'needs' of the individual consumer, nor any form of dominant social-structural totality in the form of 'the market' or 'commercial marketing activity'. Rather, 'marketing' is made up of a constellation of practices which are recursive. Consumer tastes or needs, then, are not simply shaped or manipulated by the 'market' but are the result of the interaction between consumer practices and market practices.

Schatzki, Knorr Cetina and von Savigny (2001) define practices as embodied, materially enabled sets of human activities organized around shared practical understandings. Whilst interested ultimately in the 'shared practical understandings' of consumers towards ANDS, our research does not focus on consumer experience or needs directly. Rather, this study examines the beliefs, goals and emotions at the heart of the practices performed by actors within the organisations behind the controversial commercial explosion of ANDS.

MARKETS AS PRACTICE

Practice theory has been applied to an eclectic range of marketing and consumption topics such as understanding green consumers (Connolly & Prothero, 2003), analysing the practice of DIY (Watson & Shove, 2008) and understanding the evolution of wearable tracking technology (Pantzar & Ruckenstein, 2015). However, the majority of this literature considers individual practices, rather than considering markets as practices and understanding the relationship between elements and performances across the constellation. However, there are pockets of work which fall within Callon's thinking, that markets are "constructed through a range of practices involving different forms of expertise and material devices" (1998, p.61) (e.g. Cochoy, 1998; Järventie-Thesleff, Moisander, & Laine, 2011; Kjellberg & Helgesson, 2007; Skålén & Hackley, 2011). Ingram, Shove and Watson (2007, p.3), for example, explore a cyclical model of designing and consuming, indicating that "consumer practices stimulate design; and that new products stimulate new practices". They ask whether the ambition of making things could be elaborated to move beyond a 'fit for purpose' model to include an understanding that things make the purposes for which they fit.

Of particular note is a 2008 special edition in *Marketing Theory* dedicated to work on market practices research. In their introduction, Araujo et al. (2008) define market practices as "the bundles of practices including material arrangements that contribute to perform markets" (p.8). Within this definition, they make two key points. Firstly they emphasise a preference for studying markets as "ever-changing performances, rather than as stabilized entities, shaped by multiple and distributed calculative agencies" (p.8). This focus on performance is significant, given that our access point to corporate practices in this study is the performance 'talk' of the actors who are shaping the corporate practices involved in presenting ANDS to the market. Secondly, Araujo and colleagues emphasise how false it is to differentiate between market-making practices, including academic commentary, and marketing practices, including promotion, advertising and so on. Rather, they see market practices as all "efforts to

shape markets as well as efforts to operate in markets qua structures (e.g. to promote, advertise, sell) and the intended and unintended interactions between these practices" (p.8). This is significant given the focus of this paper on the practices which are undertaken by corporate and independent actors to shape the discourses – reconstituted by the media, research and other stakeholders – which are a key part of the market system.

The work in the *Marketing Theory* special edition concentrates attention on occasions when different practices can be seen to link together. An example is through Cochoy's (2008) study of the shopping trolley, which both shapes consumer supermarket shopping activity and is shaped by numbers of supermarket, regulatory and historical contexts. The body of market practice work also considers the role of agency within the practice conceptualisation; the agency of commercial organisations (Andersson, Aspenberg & Kjellberg, 2008). Particularly useful is the work of Simakova and Neyland (2008), which explores the role of storytelling in the new product development context of a technology company. Their study is interested in investigating closely the "instability, messiness and management" (p.95) of the relationships between different actors (people and things) in a market system. They do this by exploring the storytelling of the marketing team, which is performed to a range of audiences who might come together, or unravel, or ignore the story. They emphasise that "launching a product does not involve simply sending a product out into the world, but requires the active and ongoing management of sets of relations between people and things through which the product will be taken up" (p.98). In other words, the company at the heart of Simakova and Neyland's (2008) study created a "tellable story for their own organizational actions. The tellable story involved work to produce a coherent account of what it was [the company] had been doing and what they were going to be doing. Producing a tellable story involved making sense of the possibility of a product, the possibility of a market for that product and doing a range of practical tasks to prepare for those possibilities" (p.100). In

the same way as Simakova and Neyland focus on the role of the 'tellable story' in the constitution of marketing practices, this research focuses on the tellable stories of actors in the ANDS market.

TASTE REGIMES

Furthermore, we draw on two theoretical ideas in the framing of our analysis. Firstly, we lean on the concept of taste regimes, which Arsel and Bean (2013, p.902) describe as a discursively constructed normative system that "regulates acts of consumption by providing the teleoaffective structure of a practice that orders objects, meanings, and doings". Taste regimes shape consumers' abilities to "evaluate, choose, arrange, and use objects in space, and the specific ways objects are used in everyday life" (Arsel & Bean, 2013, p.902) and are therefore important starting points for thinking about the role of corporate activity in how they are shaped. In other words, taste regimes are the manifestation of discourses which shape the meanings of a complex system of practices. The context for Arsel and Bean is home décor, but the same concept can easily be applied to consumption of – and 'taste' for – ANDs as a public health game changer. The purpose of 'taste regime' is to explain how a complex array of different interconnected practices is governed by "socio-historically contextualized discursive systems" (Arsel & Bean, 2013, p.902). Although there is considerable work on marketplace discourse, this current work is predominantly conceptualised in terms of identity construction rather than at the level of markets as practice (Ahuvia, 2005; Dong & Tian, 2009; Luedicke, Thompson, & Giesler, 2010).

Given that the focus of this paper is the commercial activities which are central to the creation of taste regimes within a model of markets as practice, we also draw on Kjellberg and Helgesson (2007) to help conceptualise these corporate activities as different practices. These authors specify that markets are constituted through three connected types of practice. Firstly, there are exchange practices involved in the consummation of individual transactions; secondly, there are normalizing practices, which are concerned with the formulation and reformulation of rules and norms in the market; and thirdly, there

are representational practices, which depict the structure and workings of specific product markets. This is a useful model, and helps further pinpoint the focus of this study, which is on the performances of corporate and independent actors in the ANDS market whose actions, emotion and beliefs formulate the rules and norms of market behaviour via the taste regimes they help create. It is useful to think about the constitution of these three types of practice, any of which will contain their own teleoaffective structures; "embracing ends, projects, tasks, purposes, beliefs, emotions and moods" (Schatzki, 1996, p.89).

To conclude the theoretical framing of this empirical paper, this research seeks to examine corporate and independent sector actors' talk, and particularly their tellable stories, in the creation of the taste regime amongst a network of market stakeholders which is ultimately shaping the widespread acceptance of ANDS consumption. In line with a market as practice approach, we conceptualise the creation of this taste regime in terms of corporate practices which are concerned with the formulation and reformulation of rules and norms in the market. The practices involved in this task contain end goals and purposes but also emotions and beliefs, in the form of teleoaffective structures. The illumination of these teleoaffective structures, through the tellable stories visible in the data, allows for a view of corporate activity which is often missing from accounts of new product development and new market penetration and can help us see how the discourses underpinning a particular product, in this case the highly contentious ANDS, are created and shaped through commercial practices and in turn relate to the beliefs and behaviour of consumers.

METHODOLOGY

The paper's conception arose from a study which systematically examined the business strategies being deployed in the e-cigarette/ANDS market (and beyond) by both tobacco multinationals and independent

companies, using primary and secondary data. The study sought to compare and contrast their respective:

(i)   business approaches

(ii)   targeting strategies

(iii)   positions on harm reduction and health claims

(iv)   marketing plans (including product development, pricing, distribution, packaging and promotion).

Only the interview data are explored in this paper. (Results from the larger study which combined analyses of primary and secondary ANDS stakeholder data are submitted elsewhere).

The lead author, a female academic researcher (PhD) with a previous career in investigative journalism, arranged and conducted all interviews. She had no established relationships with any of the participants, although it was likely some knew of her research and that she had been publicly critical of the marketing practices of e-cigarette companies and of tobacco multinationals in the past (de Andrade, Hastings & Angus, 2013; Hastings, de Andrade, & Moodie, 2012), and/or had attended the same public health meetings.

Participants were initially selected using a purposive sampling strategy to interview appropriate ANDS stakeholders and gatekeepers among UK tobacco multinational and independent companies. Snowball sampling was used, via referrals or introductions, to interview additional influential and prominent participants until sampling saturation was reached. It was likely saturation was realised because the international market has been controlled by as few as five multinational companies for the last decade (Campaign for Tobacco-Free Kids, 2016). Approaches were made by email, telephone or in person at ANDS events. Participants received a project information sheet and informed consent form, and had opportunities to ask questions about the project.

Table 1 summarises the data collection settings, interview duration and characteristics of the sample (n=28), who were interviewed once only. All interviews were audio-recoded; short field-notes were taken during some interviews; and recordings were professionally transcribed. (Copies of their individual transcripts were requested by and provided to two participants).

[Insert Table 1 about here]

The study was designed to explore business strategies from the viewpoints of ANDS business stakeholders, not to obtain a pro- or anti-THR perspective. ANDS stakeholders have diverse views on the topic so interviews were open-ended and shaped by the participant's response to items (i) to (iv) above. The interviewer commenced with an ideological 'blank sheet' and the flexible interviewing style facilitated open and expressive responses.

Open coding of the transcripts in an NVivo 11 database was used by two researchers to identify first-level concepts (see Table 2). Coding was checked by a third researcher. Using techniques of grounded theory, discussions of emergent themes and data interpretations were discussed during the inductive thematic analysis to inform further interviews, thus ANDS stakeholders could respond to emergent findings in an iterative way during interviews (Lingard, Albert & Levinson, 2008). For the purposes of this paper, subsequent thematic coding focused on beliefs, goals and emotions expressed by ANDS stakeholders (see Table 2). Tobacco company interviewees included individuals who have worked for/are working for/with the tobacco industry.

TABLE 1 Interview profiles (28 interviewees in total across 25 interviews, conducted between April 2015 and November 2016)

Interview number	Tobacco (n=13) or Independent (n=15) company	Approximate length of interview (h:m)	Face-to-face or by telephone
1	Independent	1:50	Telephone
2	Tobacco	1:00	Telephone
3	Independent	1:00	Face-to-face
4	Tobacco [x2]*	1:15	Face-to-face
5	Independent	1:40	Face-to-face
6	Tobacco	1:40	Telephone
7	Tobacco	1:15	Telephone
8	Tobacco	1:00	Telephone
9	Tobacco	1:15	Telephone
10	Tobacco	1:20	Telephone
11	Tobacco	1:10	Telephone
12	Independent	1:15	Telephone
13	Independent	1:10	Telephone
14	Independent	1:00	Telephone
15	Tobacco [x2]*	1:50	Face-to-face
16	Independent	1:40	Face-to-face
17	Independent	1:30	Telephone
18	Tobacco [x2]*	1:00	Telephone
19	Independent	1:10	Telephone
20	Independent	1:00	Telephone
21	Independent	0:40	Telephone
22	Independent	0:50	Telephone
23	Independent	0:45	Telephone
24	Independent	0:50	Telephone
25	Independent	0:50	Face-to-face

*Interview conducted with 2 interviewees simultaneously.

TABLE 2 Coding themes used to analyse the transcripts.

Open Coding	

Tobacco Industry

1. Threats to opportunities
2. Sustainability
3. Long-term use
4. TI is not a homogenous entity
5. Different strategies and goals, motivations
6. React and adapt
7. Emerging vs 'dying' markets
8. Transparency
9. Shareholder value
10. New tobacco execs, new category, new approach
11. Market share
12. Full portfolio
13. Safety, high quality standards
14. Clear communication of risk
15. Regulation [to protect the companies vs innovation]
16. Science
17. Protect the cigarette
18. Complete transformation
19. Competitive advantage
20. Scale and distribution
21. Keep the consumer, meet the consumer's needs
22. Legal

23. Consolidation [vs innovation]
24. The Apple/iPhone model: closed vs open systems – brand creation [linked to heat not burn]
25. Grow and compete / expand the market

Independent Companies

1. End of combustibles
2. Opportunity for profit
3. Open system / individualised product / understanding the consumer
4. Survival
5. Retail model
6. Innovation
7. Lobbying
8. Build a brand/ credibility

Other

1. Battlefield OR battles and discomfort [and confusion/and ideology] – between public health groups, between TI companies, within TI companies / industry is not an homogenous mass
2. Confusion [public health]
3. Terminology
4. Ideology
5. Vested interests

Thematic Coding	

1. Ideology
2. Battles
3. Confusion
4. Trust
5. Interests
6. Values
7. Science

[Insert Table 2 about here]

Data were then analysed using the theoretical framework detailed above. Findings in the next section are the project's data used to illuminate the teleoaffective structures in the ANDS stakeholders' commercial practices.

A limitation of our study is that interviews were only with tobacco and independent company ANDS representatives. As such, our analysis does not account for the beliefs and emotions of public health bodies, researchers, the media, policymakers and other stakeholders. It is also important to acknowledge the interviewer's and authors' own beliefs, goals and emotions. While every attempt was made to abandon pre-existing ideologies, conscious or unconscious biases in the interviewing style may have driven interviewees' responses and influenced data interpretation. The paper adheres to the COREQ checklist (Tong, Sainsbury & Craig, 2007), developed to promote explicit and comprehensive reporting of qualitative studies. Ethical approval was granted by School of Health in Social Science Research Ethics Committee at the University of Edinburgh.

FINDINGS

Firstly, analysis illuminates some of the practices involved in the ANDS market system. Description of these practices includes 'pushing', 'repositioning', 'trying', 'supporting', 'tying things together' and 'playing stakeholders off against each other', suggesting a very considered effort to shape stakeholders' beliefs. Our analysis labels these efforts 'projects', as per Schatzki's (1996) list of inclusions within teleoaffective structure. Other teleoaffective structures clearly identifiable within the interview transcripts include 'end goals', 'emotions and moods' and 'beliefs'. The discussion which follows this section will explore how the projects, end goals, emotions and beliefs which comprise the teleoaffective

structures of various corporate practices inform the rules and norms of the market, shaping a taste regime.

Projects and end goals

Stakeholder alignment

The interview data illuminates the efforts taken by ANDS companies to align the beliefs of key stakeholders with their own in order to shape the discourse underpinning the new and commercially profitable practice of ANDS consumption. A TI (tobacco industry) representative explained that strategy in the ANDS space 'assumes that all sections of society – or someone looking after all the sections of society – are pushing things forward' (int4). The discourse in 'society', according to the interviewee, is not simply being 'pushed' by people working within ANDS marketing and strategy but by other stakeholders, especially 'government'. It was further explained that 'four parties' are involved in the gathering of this discursive momentum: 'the people who may choose to use them – the consumers; it involves the companies who are making them; it involves the government that sets out whether this is a good thing or a bad thing; and then involves scientists actually trying – when it's a risk strategy – it's scientists trying to figure out' (int4). The interviewee reflected on the complexity of steering and shaping a discourse comprising so many different agencies, people and interests. For example, stakeholder misalignment of 'that four-centred dynamic' was highlighted as a reason for failed attempts to introduce a tobacco harm reduction paradigm shift 'historically', adding that 'those four things had never really come together' (int4). Here, the interviewee's mention of 'things' refers to the four key stakeholder groups which they see as underpinning the global discourse around ANDS which is currently 'very different in different parts of the world' – 'so UK, it's almost harmonised; in the US, it's certainly not; at WHO level, it's not' (int4).

Other interviewees spoke of the complex effort required to 'tie' together stakeholder interests. That complexity is particularly noteworthy even though, (according to int13, a respondent not related to the tobacco industry) all stakeholder agendas with the exception of the TI 'probably aim at the same focal point... to make tobacco irrelevant' (int13). Furthermore, other independent interviewees reflected on the diversity of TI and other stakeholder beliefs including public health advocates, researchers and the media. They explained that each stakeholder group can be accused of making 'unsubstantiated accusations that have no basis in truth' (int19), and this was described as a 'function of special interests and a variety of them, all combined together' (int19). These 'different vested interests of different groups' were described as liable to change depending on 'which company or health organisation' is pushing for a particular interest rather than 'better align[ing] what we're doing with the pursuit of the health goals that we have in mind' (int1).

The picture here is of a discourse around ANDS which emanates from a volatile environment containing multiple stakeholders. There is no simple message or agreement amongst stakeholders that ANDS relates to reduced or zero tobacco consumption, and the task for the ANDS companies in aligning public voices across the stakeholder group is vast and difficult. Although some (non-TI) interviewees suggested that history and science would be the real tests about the outcome from ANDS, the data illuminates the context of how public discourse comes about and the role of corporate and independent actors in actively shaping that discourse. Of particular note is that the discourse is shaped not only by direct corporate activities targeting consumers, but also through the alignment of the beliefs of other stakeholders in the system, such as health bodies, academics, media and publications. Commercial practices involve the push and pull of these stakeholders in order to negotiate the configuration of the market. As ensuing data will illustrate, these beliefs and emotions are firmly felt and discussed by the interviewees with deep feeling (and often strong language). However, as the next section illustrates, a

driving goal for the corporate actors is creating profit, and it is interesting to consider the alignment between the articulated beliefs and emotions with the 'profit' goal.

The profit endgame

Findings suggest that a central end goal associated with any corporate practice within the ANDS market is profit maximisation, through achieving competitive advantage and by creating demand, though tobacco companies have different competing strategies to achieve this. This pursuit for profit guided by the fiduciary imperative – the legal requirement of corporations to always put the interest of their shareholders first – is a dominating influence on everything they do. One TI representative explained that ANDS offers 'a paradigm shift for our industry'; 'an opportunity from a business point of view to grow our market share' and 'at the same time, it's good for public health'; 'both a huge business opportunity' and as 'the moral, right thing to do' (int15). This articulation offers a clear alignment of corporate and public health goals, but there is also evidence in the data that the alignment of TI's goal for profit-maximisation and public health's eradication of tobacco has, as int12 put it, 'been muddied and clouded' by rival tobacco companies having such diverse tobacco harm reduction strategies. An independent interviewee added that some cigarette companies are now 'more against smoking than some of the anti-smoking groups in what they've said' (int11).

Furthermore, there is competition within different parts of the TI, for example, and interviewees described this internal competition as having led to 'all sorts of battles going on internally' within 'the different components' of the TI (int1). Even subsidiary companies 'are deeply competitive organisations' with 'their own management teams, have their own people with their own interests and are not working in concert with each other. They're constantly looking to take market share off each other' (int3). So, whereas profit and public health goals seem to align, tensions within the TI create a context of high stakes and high emotion. For example, one interviewee explained how 'there is very clear evidence

in public fora' of internal criticism and differences of opinion across the TI (int7). This is understandable given the corporate profit-driven agenda, but several respondents spoke about the 'serious cut-throat stuff going on' between companies (int3) such as publicly presenting data that 'trashes' another company's data (int3) and 'multi-national frickin' tobacco companies competing on science' (int2). This is where it becomes most evident that 'all big tobacco is not a homogenous monolith with the exact same interests' (int3). Each company has its own ANDS corporate strategy. Indeed, looking for 'notion of differences… across the industry; how are their interests and intentions different and what are the implications of that? … is a really important piece of the puzzle' (int2). While all TI companies are invested in ANDS, they are competing 'definitely on different levels' (int21). Whereas on some occasions TI companies reportedly join forces with others when beneficial as evident in 'cross marketing arrangements' (int25) and 'technology sharing and licensing agreement[s]' (int3), interviewees also noted that 'the very senior leadership' are allowing this type of 'sort of broken up system to take place' *within* companies – encouraging 'friction' between the combustible and THR sides of a company's business. This entails 'making investments and standing up business lines that are in direct competition with each other' (int9). Paradoxically, 'the way that [TI] companies have made all their money is what's being threatened by the investments in the new units' (int9).

In this conflicted environment, it is possible to see how corporate attempts to align stakeholders into a common purpose is unlikely to be a smooth process. Furthermore, as the following two sections illuminate, the strength of 'beliefs' and 'emotions' evident in the interviewees' accounts suggests a further layer of complexity and turmoil infiltrating the ANDS discourse.

Beliefs

Pro- or anti-tobacco harm reduction

The belief that there are two distinct divisions in the harm reduction debate – stakeholders are either pro- or anti-THR – comes out strongly in the data. Public health researchers, health bodies, regulators and other stakeholders were placed by interviewees on opposing ends of the THR spectrum: either in favour of alternative forms of nicotine to reduce harm caused by smoked tobacco *or* a cold turkey approach to quitting tobacco involving no reduced nicotine consumption. It was noted that some health organisations say they have a 'tobacco-free' goal – though 'tobacco is defined as any form of nicotine – then they're abstinence only' which, according to an independent interviewee, means 'they end up getting something that protects the [tobacco] companies' as it becomes 'virtually impossible to get a reduced risk product to the market' so tobacco is the only option (int1). This respondent reflected on why it is difficult to change these beliefs about tobacco usage for anti-THR stakeholders: '[you get] deafening silence from people who are still travelling round the world, going to conferences, talking about the [tobacco] endgames, presenting their ideas and getting rounds of applause... these people benefit from the current paradigm. You know, they're flying around the world on somebody else's dime, drinking beer with their friends, and being heroes. Why are they gonna change?' (int1). Findings also suggest that a paradigm shift towards a fully embraced tobacco harm reduction approach is complicated by strong – often conflicting – beliefs in science.

Belief in science

Driving these pro- or anti-THR beliefs, is a fundamental belief in evidence-based practice confounded by contradictory results by researchers on opposite sides of the debate. As one independent put it: 'How do you know what's true, what's not true? Particularly when it comes down to scientific evidence, right?' (int3). Furthermore, findings reflect the belief that 'there's a lot of research being done in this field that is driven by political dogma… People are setting up studies with a particular political agenda…

all the way from study design through to the way the results are being interpreted and written up, to the lack of peer review from major publications, to the press releases that are being issued from so-called, you know, quality journals, and the way it's being reported in the media' (int5). This suggests that the public discourse around ANDS is shaped by stakeholders across the market system. In light of this, and the earlier commentary about efforts to align stakeholders with the interests of corporate actors, it is unsurprising that TI respondents noted a 'duty' to contribute to scientific evidence. As int4 explains, 'we [TI] have a duty, especially in this one… where there's so much uncertainty in the health community as to whether they'll be good or bad, that we will publish, absolutely publish on this one' (int4). Another TI interviewee added: 'no one's had these types of products before and certainly not with the level of scientific substantiation and evidence which we're compiling'; 'we are investing a huge amount of time, resource, expertise, in the science, to enable those conversations and to objectively look at the best route forward' (int15). Objectivity was questioned by some independent respondents, however, who note that 'everybody doubts Big Tobacco's science because Big Tobacco can afford to buy results. There's a big difference between buying the results and buying independent research' (int19).

The opposing beliefs about 'science', argues one respondent, 'leaves the consumer ineffably baffled' not least because there are health organisations in whom stakeholders have an 'awful lot of trust' promoting ANDS, 'and the rest of them saying "No, no, no, no, no. They're as bad as, or worse than"' (int11). Some independents highlighted 'distrust of the tobacco industry' (int16), while others noted that tobacco companies 'know their products inside out and back to front, they've got scientists working for them who probably know more about some of these issues than anybody else' so there needs to be 'some sort of compromise to be found, where they're allowed back in, under intensely close scrutiny, but their work is not automatically dismissed' (int5). Clearly, the part of scientific evidence to play in the ANDS discourse is contested, and the beliefs of actors in the market carry considerable weight in the treatment of this evidence and the way it is voiced.

Emotions and moods

Closely related to 'beliefs' is a series of strong emotions that tended to cluster around a few key topics. Here, the emotional language, often including vulgarity, is noteworthy, as are the regular references to personal perspectives, individual vested interests and seemingly powerful personal motivations for one position over another within the contested areas of debate. For example, an interviewee referred to the ANDS context as 'a religious thing. This is a culture war' (int1) and another described the nature of evidence and research in the field as 'fraught; this one is highly contested' (int3). This respondent also noted that within the 'public conversation… the loudest voices are the ones that are like, "Rah, rah, fuck up. Back off. Get out of our faces, Nanny"', suggesting undertones of anger and frustration. There was yet more generalised emotional language in the interviews in the form of descriptions of personal motivations of different stakeholders within the ANDS context. One respondent explained the 'disappointment' that would be felt by 'a policy person, an anti-smoking person' who might have 'spent your whole life trying to stamp out smoking' (int16). However, emotional talk in the interviews tended to fit mostly into four areas; trust in science, the contested role of peer reviewed journals, vested interests and moralising.

Trust in science

The open-ended informal interview style meant emotional articulations often emerged as a stream of consciousness and flowed from points raised during the interview. Use of heated language was expected given the contested nature of the controversial THR debate, particularly as the interviewer and authors of this paper have been publicly critical of private-sector involvement in public health policy and e-cigarette marketing strategies. Conflicting beliefs on what constitutes 'true' science evoked emotional responses on how and why researchers, health bodies, the media are misleading the ANDS public discourse.

In one response, where an independent respondent was reflecting on differences between the tobacco and pharmaceutical industries and whether the TI was reinventing itself, the reply started with reflection on how some anti-THR public health tobacco control groups are not 'subject to that same vested interest criticism' as others. It then moved on to criticisms of poorly designed and conducted studies – 'well that's just scandal! That's just shit science, right? Really bad. All the way from who designed that study, to conducted the study, to who wrote it up (int5)'.

The role of peer-reviewed journals, media and health bodies

Int5's disappointment in the trustworthiness of 'science' was linked to the belief that accurate science should be upheld, and extended to the journal itself: 'shame on them for publishing it and press releasing it in that way and allowing those articles to be written. I struggle to think of many things that are less scientific… not objective, factual, scientific' (int5). Another respondent referred to the same study when asked about what the consumer is meant to do in the face of contradicting science. Referring to 'the crap' that comes out of some research groups, this independent stakeholder pointed to the media's role in this confusion: 'there's nine million smokers who are being told by [tabloids] that it's pointless switching cos it's gonna kill you just as quick' (int12). Further to this was the emotive belief that it is 'really, really wrong… this calling people on conflict of interest. That's just disgraceful' (int5).

Personal beliefs, views and vested interests

Responses demonstrate how personally invested people are in ANDS and how the 'very rapidly moving field' is 'further confused because of all the preconceptions, ideological views' and 'financial interests' including accepting grants from organisations that have an abstinence only goal (int1). Some respondents noted that 'there are billions of dollars annually going into tobacco control and a lot of people are making a very nice living, thank you, out of all of that. And that's before you look at stop smoking services and the likes of [anti-smoking groups]… All of these organisations are all paying their

mortgages and they're all paying their mortgages because of the tobacco industry' (int12). As a result, there were calls for 'more people being open and honest with their values' to 'facilitate an interaction going forward between… researchers… and people, now on the tobacco side, and people on the science and product side' (int10). One respondent spoke of the 'hypocrisy in the form of tobacco control movement in this area', once again commenting 'a lot of mis-statements about what the science is' and 'a lot of misleading of consumers' (int8).

Moralists

Emotive responses suggest that interviewees have strong opinions about what is 'right' and 'wrong' or 'good' and 'bad' about the way in which personal beliefs in ANDS influence science and the THR agenda. Stakeholders with differing views – or 'moralisers' (int3) – were described as being separate from the topic rather than embroiled in the same issue. An independent respondent explained that anti-THR individuals are prejudiced by 'the tobacco wars and the malfeasance by the tobacco industry' and this 'forms the bedrock for this particular moral panic' (int3). They added that 'one's got to be very careful about… being too moralistic about this. You know, the reality is it's all amoral, as far as these companies are concerned' (int3). It was further suggested by another independent interviewee that those who have 'got an absolutist, ideological position' are 'actually standing in the way of making the sorts of moves that will really protect the environment' for the tobacco industry (int1).

Conclusion to findings

Analysis has indicated that the ANDS market is highly contested and volatile, interwoven with competition, emotion and conflicting beliefs. In this context, there are commercial practices routinely undertaken in an attempt to align stakeholders' beliefs, which are seen as a core part of the corporate activities required within the marketplace. A key driver of these alignment activities is the profit end-goal, but which is also in tension with beliefs about doing 'right'. Although companies have the same

overarching goal of profit maximisation, this is far from a simplifying mechanism given the competing beliefs and emotions also at play in the marketplace. Beliefs across this emergent market vary and are strongly held, and they lead to emotional positions, tying back to why aligning stakeholders is difficult. Harmonisation is further complicated by tightly guarded views by other stakeholders including public health bodies, researchers, the media and journals on the science and whether ANDS will contribute to the eradication of the tobacco epidemic.

DISCUSSION

The discussion explores the implications of analysis which illuminates the various projects, end goals, emotions and beliefs within the commercial practices involved in the ANDS marketplace. It is clear that to understand the marketplace in such a contested, volatile context requires activities far beyond those listed in marketing textbooks, which might include new product development, branding, promotion and distribution. Our findings have pointed to the centrality of the multiple and often competing beliefs across the multiple stakeholders in the ANDS market, and to the importance of corporate actors creating and pursuing 'tellable stories' to infiltrate the public discourse around the new product. We have illuminated the activities and tensions buried deep in the ANDS marketplace: the stakeholder alignment activities, the sometimes internally divisive drive for profit, the competing beliefs around tobacco harm reduction and science and the strong emotions which infiltrate marketplace activities and discourse. This picture suggests that viewing the market as a constellation of practices is a far more fruitful way of understanding marketing in the fullest sense. As a system of practices, reaching far beyond any reductive model of consumer-organisation relationship for mutual benefit, it is possible to see the ANDS market as an evolving entity, shaped by and comprising the market-making practices of the various actors and, rather than in spite of, their tensions, emotions, beliefs and end goals.

A significant set of market activities that our findings highlighted was the alignment projects, which are part of the 'normalizing practices' of commercial actors in the ANDS market. They are concerned with the formulation and reformulation of rules and norms in the market, aligning important stakeholders with held beliefs and commercial goals. These alignment activities happen against the backdrop of competing beliefs, strong emotions and contested evidence. At the most basic level, even the effectiveness and outcomes of ANDS is far from settled, and the alignment activities of the market players are extremely challenging. Their contested nature is an important part of the set of practices making up the ANDS market system.

Seen as a system of market-making practices, including the various messy stakeholder practices noted above, the teleoaffective structures within the practices become important for illuminating the way the practices are shaped and what drives them. As a reminder, teleoaffective structures include project ends, projects, tasks, purposes, beliefs, emotions and moods (Schatzki, 1996). They are part of the practice and are part of what guides and drives it. What is clear in the research findings presented is that the teleoaffective underpinnings of the corporate activities in the ANDS marketplace are conflicted and intense. The strength of language used by the interviewees offers a glimpse of the ferocity of the mood. Where there are beliefs, for example, about anti-tobacco harm reduction or the veracity of some part of the canon of scientific evidence, there are strong emotional reactions to stakeholders and whole institutions with incompatible views. Such beliefs and emotions, part of the teleoaffective structures specific to this particular industry at this particular time, are an important factor within the marketplace.

The theoretical positioning of this paper argues that the corporate practices in a marketplace system contribute to the creation of a taste regime. Although this paper did not examine the tastes of consumers, the consumer context is of an explosive market, with sales increasing exponentially year on year. The power of consumer tastes for vaping, it would seem, is strong and growing. This is perhaps

surprising given the degree of disintegration and embattlement evident in the interviews. However, it might suggest that despite the conflicted context, the commercial actors in the marketplace succeed in creating a tellable story which is compelling for consumers, and that there has been some success in aligning the activities of powerful stakeholders with the interests of commercial organisations. However, this potentially simple solution is questionable when considering the role of the media in highlighting to consumers the level of conflict between stakeholders, which is highly newsworthy content. Keller and Halkier (2014) demonstrate how consumers draw on media discourse as a symbolic resource to position themselves in relation to contested consumption activities. Consumers use media to make sense of practices and to shape the meanings of the practice. It would seem that consumers are drawing on the media discourse around ANDS, along with tellable stories from the corporate and independent actors, and negotiating the meanings of ANDS consumption practice which is appealing and is succeeding in recruiting more practitioners over time. For the market to thrive, consumers cannot be as 'ineffably baffled' as one of the respondents suggested. Conflicted practices fail to recruit practitioners, and consumers must play their part in overcoming practice conflict. This is a reminder that consumers are an important part of the marketplace practices, and that further research into consumer engagements with ANDS consumption would be a logical next step in this research endeavour.

This paper does not try to identify what corporate practices make up the creation of a taste regime, but rather illuminate the significance of teleoaffective structures in the corporate activities which make up some of the range of market-making practices in the constellation. Beliefs and emotions stand out as central, as do end goals. This tells us something about the way that the ANDS market works, and particularly about the importance of understanding flows of meaning within a marketplace system, rather than restricting analysis to a reductive model of marketing based on consumer-organisation exchange. The emotions and beliefs of corporate and independent actors set the scene for a conflicted environment in which actors strive for stakeholder alignment in order to achieve a compelling tellable

story and generate marketplace norms and a profit-enhancing taste regime. Although out of the direct sight of this analysis, within the taste regime, consumers draw on marketplace discourse in their own market practices, and co-constitute the taste regime. This view of marketplace practices as a system of contingent, contested and teleoaffectively-underpinned practices allows for a fuller understanding of how marketplaces work, and treats consumers as part of the system of market practices rather than as outside it, or as its objects.

The ANDS market is likely to be a special case, given the generations of public health campaigning around tobacco and the previous mistrust and revelations about the tobacco industry. However, stakeholder alignment, and indeed the politicization of marketing, is likely to inform new products of multiple types, such as consumer health tracking technology, food and beverage products and automobiles. As such, there are clear benefits beyond the ANDS context to viewing markets as interlocking practices in which emotions, beliefs and end goals play a central part.

CONCLUSION

Continued uncertainty and confusion about the health and wider implications of the growing ANDS market fuelled by a highly contested and incomplete evidence base prompted a national consensus statement on e-cigarettes led by NHS Health Scotland (2017) with leading health bodies, charities and academics 'to clarify perceptions about any harms and benefits of using e-cigarettes'. It stipulates that 'there is now agreement based on the current evidence that vaping e-cigarettes is definitely less harmful than smoking tobacco', though 'there is still a lot we do not know about e-cigarettes' and 'they are not risk free'. The statement, coinciding with the launch in England of this year's Stoptober campaign by Public Health England (2017) in which e-cigarettes are being promoted as a quit option for smokers, highlights the 'need to carry out research to understand these risks' while making 'the best use of the situation to reduce tobacco smoking further' (NHS Health Scotland, 2017). Far from settling the debate,

however, some resultant media reports pointed to conflicting draft guidance released simultaneously by the UK's National Institute for Health and Care Excellence (see NICE, 2017) 'expressing caution about the risks and benefits of vaping' (Donnelly, 2017).

Polarised views on whether ANDS products will turn out to be 'good' or 'bad' for public health – or even what is meant by 'good' and 'bad' in light of the TI's involvement in ANDS – prevail and this is likely to remain the case for many years to come while the long-term science is being established. When (or if) it does, questions about whether this is 'science in the private interest' (Krimsky, 2003) will probably form the basis of studies by critical scholars as we have seen with the pharmaceutical, alcohol and processed foods industries amongst others (Goldacre, 2012; Moodie, Stuckler, Monteiro et al., 2013).

The ANDS vacuum has been filled with emotion, beliefs and teleoaffective structures – the 'tellable story' – with profound implications for both the private sector and civil society actors. Before addressing each of these sectors in turn, the challenge of concluding a paper on emotion and belief in ANDS when the authors themselves are a part of the same market system is duly noted. This calls for a frank disclosure of the difficulties faced in framing and publishing this work, while adopting a neutral 'ideological blanksheet'.

On the one hand, there has been encouragement to robustly question the intentions of tobacco companies when 'thousands of internal tobacco industry documents released through litigation and whistleblowers reveal the most astonishing systematic corporate deceit of all time' (Bates & Rowell, 2000, p.i). This positioning contests that all morals are not relative and – based on historical attempts to influence policy and legal requirements to prioritise profits over health – industry objectivity, science and motivations should be called to question. According to this view, adopting a relativistic stance serves the interests of industry.

On the other hand, industry is contributing to the ANDS evidence base at a speed and volume that far outweighs the work of independent researchers. They have the resources to continue to produce the science and work with key opinion leaders. They also have the resources to legally challenge obstacles. Several leading public health experts and bodies, whether in receipt of industry funding or not, *are* supportive of these products – though many refer to the ANDS market in its entirety as 'e-cigarettes' when the market is not homogenous but fragmented; comprised of a variety of products ranging in safety, efficacy and consumer preference. From this position, criticising e-cigarettes because they are TI funded may be putting smokers off quitting smoked tobacco.

The situation is far from straightforward as alongside industry, all stakeholders – whether journalists, journals, researchers, health bodies, funders, policymakers or universities – have some direct and/or indirect vested interests, financial or otherwise. Implications for both the private sector and civil society actors follow.

Private Sector

Beliefs about tobacco multinationals are tainted by the TI's deceptive history: they are past masters at the tellable story. From the 'Torch of Freedom' to the 'Marlboro Man' they have been able to construct narratives that turned an addictive, smelly carcinogen into symbols of female emancipation and rugged Americana. Even in the face of an undeniable public health evidence base and direct debunking, these myths have been remarkably persistent (Hilts, 1996; Hunt, Hannah & West, 2004). The tellable story of THR promises to be even more powerful: it has the potential to make a hero not just of the product but the companies themselves; to turn them from pariahs to public health partners. An industry that was struggling to recruit a decade ago now has a workforce that is telling itself and other stakeholders convincing stories about doing more for public good than some parts of tobacco control. This ability to work with uncertainty around ANDS is not surprising for an industry that said "doubt is our product"

(Brown & Williamson Records, 1969, p.4) even when there was no doubt. However the story of ANDS, we are told, is different from the past: it is about 'openness and transparency' not denial and manipulation (British American Tobacco, 2016). Furthermore, ANDS has fractured the 'homogenous monolith' that is the tobacco industry. Different, contradictory tellable stories are emerging from deeply competitive tobacco companies.

The independent ANDS producers can tell equally compelling stories about their fight against tobacco and the support they give to and get from their much-maligned customers. They are sometimes perceived as the plucky underdogs of the market, with the empowerment and liberation of the hard-done-by smoker at heart. Innovation is driving their tellable story.

In both cases an important story is not being overtly told, merely assumed: that exploiting nicotine dependence for profit is a legitimate business. Whereas a generation ago the TI was deeply embarrassed to be, by its own admission, 'in the business of selling nicotine, an addictive drug' (Robertson & Hurt, 2010, p.69), and went as far as committing perjury in the US Congress in its efforts to deny any such addictiveness (Robertson & Hurt, 2010), it can now embrace this reality with impunity and even gain public health grace in the process.

The private sector then has an array of tellable stories about ANDS, each giving the impression of being tenable in its own right. The disarray in the public health evidence base means that the only constraint on these narratives will come from the bottom line. For the foreseeable future, only the graphs of shareholder value will tell us whether ANDS are a silver bullet, a temporary distraction or a public health catastrophe in the making – and whether the outcome will be the function of 'the force of corporate marketing' or 'a consumer-driven revolution' will remain a point of contention.

Civil society

Meanwhile the lack of scientific consensus on ANDS has had even more dramatic impacts on civil society, where it has torn the tobacco control community apart. On one side, there is 'traditional public health' which has spent two generations fighting tobacco and the TI, and has much invested in a black and white framing: what is good for the TI will necessarily be bad for public health; end of story. It also takes a broad view of public health, seeing it as a means of empowering people to take control of their own health. This makes addiction, which necessarily undermines agency, a troubling concept for some public health researchers who believe that nicotine is, in and of itself, a bad thing and prevention is axiomatically better than cure (e.g. Moore, McKee & Daube, 2016; Chapman & Wakefield, 2013; Hastings, de Andrade & Moodie, 2012). On the other side is a more focused and medicalised public health grouping, which sees the problem specifically in terms of the toxicity of tobacco. Addiction is not a problem per se, and nicotine use is only a concern because of the flaws in the delivery device (e.g. Britton, Arnott, McNeill, et al., 2016). This group is as comfortable with cure as prevention and has long championed intensive cessation services using pharmacotherapies and Nicotine Replacement Therapy (NRT). ANDS are a natural extension of this work and a welcome innovation (e.g. Etter, 2015; Cahn & Siegel, 2011).

Again, therefore, the different actors have tellable stories, each of which is compelling – until you hear the other one. The lack of scientific consensus means that both stories prevail: WHO, for example, are energetically telling the first, whilst the UK proclaims the latter (e.g. WHO, 2017; Public Health England, 2017; NHS Health Scotland, 2017). The losers in the resultant muddle are again the general public, who get contradictory messages from opposing experts filtered by confused journalists who attempt to interpret journal findings and press releases in their efforts to sell stories.

This raises further questions about the nature of evidence. Nothing is value free: commentaries from the media, academia and policymakers create the market and discourses that perpetuate across the market constellation. There is nothing outside practice – we are all locked in – so careful self-reflection

is needed on our own intentions, motivations and interests. There are serious research implications if academics are forced to 'pick a side' – pro or anti THR – when presenting ANDS findings. Increasingly, papers are rejected for not adopting a firm ideological position often shaped by journal and reviewers' beliefs on the topic. This form of agenda-setting has a profound impact on policy, practice and the academy and is personally distressing for researchers, particularly early career academics, who are caught in middle of this volatile market.

Wider implications

Beyond the specifics of the ANDS market, this victory of story over evidence has profound implications for tackling the intractable problems – pollution, climate change, inequalities – that face our species. Tobacco control is one of the greatest success stories of public health; literally millions of lives have been saved as smoking prevalence has been driven down with a combination of popular empowerment and corporate containment. All this depended on a coherent and accepted evidence base; as this has fractured so the stories have proliferated and progress has become less certain. With issues like global warming the room for doubt is much greater. We might now be reaching a point where anthropomorphic climate change is widely accepted – the election of Donald Trump notwithstanding – but we are very far from agreeing on the role economic growth plays in the problem, let alone the consumption of specific products or services. This evidence base will be contested with the same energy as with ANDS and we can expect many uplifting stories about the green credentials of SUVs and inter-continental travel. Such are the challenges of regulation in a post-evidence world where wicked problems abound and the need for corporate behaviour change becomes more apparent, but also more elusive.

respondents, in particular gatekeepers, who facilitated access to elite interviewees for primary data

collection.

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