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Vapers Panel Survey to Measure Attitudes and Behaviours Regarding Vaping Products

Executive summary

Prepared for Health Canada

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Executive summary

Prepared for Health Canada by Environics Research

March 2019

This public opinion research report presents the results of an online survey conducted by Environics Research on behalf of Health Canada. The research was conducted between February 4 and 26, 2019 with Canadians aged 15 and over who are vapers.

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Executive summary

Background and objectives

The Government of Canada has introduced new legislation to regulate the manufacture, sale, labelling and promotion of vaping products in Canada. The goal is to protect youth and non-users of tobacco products from nicotine addiction and inducements to tobacco use, while allowing adults to legally access vaping products as a less harmful alternative to tobacco.

Vaping products have been in the North American market for approximately a decade. With only a few studies available, data are limited on the knowledge, attitudes and beliefs of Canadians as they relate to vaping products. Health Canada is interested in better understanding how Canadians are using vaping products.

This public opinion research will assist in monitoring how the new regulatory regime may be affecting consumer behaviour with respect to vaping products and will help inform policy and regulatory decision making in the face of a rapidly changing market. More specifically, it will provide additional data about the impact of the introduction of JUUL to the Canadian market in September 2018 (JUUL has captured 70% of the US market) and the effects that the legalization/regulation of cannabis will have on the use of nicotine/non-nicotine vaping products.

The main objective of this research is to gather information on the attitudes and behaviours of Canadians who are regular vapers aged 15 years and older with respect to vaping products. The specific research objectives were to:

- Measure Canadian regular vapers' level of awareness and knowledge of vaping products;
- Gather information on Canadian regular vapers' behaviours with respect to vaping products, including product evolution;
- Gather information on the vaping devices and e-liquids currently being used by Canadian vapers.

Methodology

To address the research objectives, an online survey was conducted with Canadians aged 15 and older who are **regular vapers** – defined as those who vaped at least once a week for the past four weeks. Environics conducted a total of 2,027 surveys with this target audience between February 4 and 26, 2019.

Survey respondents were drawn from among panels of individuals who have agreed to participate in online surveys. The data have been weighted to reflect the demographic composition of regular vapers in Canada according to the 2015 Canadian Tobacco Alcohol and Drugs Study (CTADS). Because the sample is based on those who initially self-selected for participation in the panel, no estimates of sampling error can be calculated and the results cannot be described as statistically projectable to the target population.

Three age groups are discussed throughout the report and defined as follows: youth vapers (15-19 years old), young adult vapers (20-24 years old) and adult vapers (25+ years old).

Contract value

The contract value was \$149,432.56 (HST included).

Key findings

The research results reveal two differing orientations towards vaping based on age. In general, adult vapers tend to perceive vaping in a more practical light. They are most likely to be current or former smokers, who are using vaping products to quit smoking or reduce the number of cigarettes they smoke. They tend to stick to one device (that is easy to use) and to one flavour, and to vape in the privacy of their home.

The profile of youth and young adult vapers suggests a more recreational approach to vaping. In general, these age groups appear more likely to vape because it is appealing: they are more likely to switch between devices and flavours; to appreciate what their device looks like (colours) and what it can do (tricks); and to vape in social settings outside the home. A potential key factor is that youth and young adult vapers report much greater exposure to peer vaping through friends and classmates.

The following are the key findings of the research:

Vaping use and attitudes

- Overall, regular vapers are slightly younger and include a greater proportion of males than the overall Canadian 15+ population. The majority (67%) vape with liquids containing nicotine and four in ten vape non-nicotine liquids. Four in ten describe themselves as daily vapers, and more than half (57%) vape 15 or more days per month. The majority (56%) have been vaping for more than a year, although youth vapers are more likely to have recently picked it up.
- Half (53%) of regular vapers are using the same vaping device brand or model they started with. Based on the pictures provided¹, most vaping devices were either second generation pens or had modifiable design characteristics of the third generation. The feature regular vapers like most about their device is their ease of use, although flavours, device colours and the ability to do tricks is of relatively greater importance to youth vapers. Vaping is most likely to take place at home, while youth vapers are more likely than others to also vape at parties, at recreational areas or at school.
- Vape shops are the top source for vaping devices and liquids, regardless of age, although the proportion who purchase online is higher for young adult vapers, while youth vapers are relatively more likely than adult vapers to source their vaping products from friends and others. One in three (33%) regular vapers are regularly asked to provide proof of age when purchasing in-store or online, although youth vapers (58%) are more likely to encounter this requirement.
- Almost half (47%) of regular vapers have tried to reduce how often they vape and one in four (25%) have tried to quit. One in three (35%) plan to quit vaping in the next year, which skews strongly to those who have tried to quit before (68%). Regular vapers also report a high degree of switching between nicotine and non-nicotine varieties and between varying nicotine strengths.

¹ Valid pictures were provided by 13 percent of respondents, (n = 269), and therefore should be considered as a rough estimate of the devices in use among regular vapers.

- Reasons for vaping depend on smoking history, with dual users and former smokers most commonly using it for smoking cessation. Never smokers – of whom most (70%) are youth or young adult vapers - choose to vape because they like the flavours/smells, as a social activity, or for emotional reasons (e.g. it's fun, reduces boredom).
- Regular vapers generally agree that vaping products, both with and without nicotine, are less harmful than cigarettes (66% and 76%, respectively) and can be a useful cessation aid (75% and 70%). Regular vapers also believe vaping is more socially acceptable than smoking, and experience this in their own lives, with fewer hearing disapproval for their vaping than for their smoking (if they are dual users).

Vaping information and advertising

- Regular vapers demonstrate interest in vaping information, with half seeking information about: the health effects of vaping versus smoking (54%), using vaping products to quit smoking (53%) and the health consequences of vaping (51%). In addition, four in ten say they read the health and product information printed on vaping products themselves (40% always or often).
- Recall of recent advertising or promotional materials about vaping is fairly limited (28%), although it is relatively higher among youth and young adult vapers. Recall is mainly about particular brands of vaping devices, although youth are most likely to recall vaping lifestyle content. Social media is the top recalled source of this advertising, which is most commonly believed to be paid content created by a company (rather than content created by friends or others). Young adult vapers are also more apt than others to recall online shopping links and access codes, likely because they do more online purchasing.

Cigarette use

- The majority of vapers (60%) also smoke cigarettes and thus are dual users; this proportion is higher among young adult and adult vapers, but nonetheless includes almost half (45%) of youth vapers. Most dual users (85%) tried cigarettes first, although this is less the case among youth (64%), who are in turn more likely to have vaped first. Dual users who smoked first say vaping has reduced their frequency of smoking. However, those who vaped first (13% of dual users) say that smoking has subsequently increased their frequency of vaping.
- Vaping products with nicotine play an important role in the smoking cessation attempts of dual users who are trying to quit, and the quit success of former smokers. Similarly, both former smokers and dual users trying to quit believe it is at least somewhat important to have a range of vaping flavours available to them. This dual user group that is trying to quit tends to use an ad hoc approach/no set plan in place (58%) rather than a set plan that gradually tapers the number of cigarettes smoked (34%).

Political neutrality statement and contact information

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