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Vapers Panel Survey to Measure Attitudes and Behaviours Regarding Vaping Products June 2019

Executive Summary

Prepared for Health Canada

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Canada 

Vapers Panel Survey to Measure Attitudes and Behaviours Regarding Vaping Products – June 2019

Executive Summary

Prepared for Health Canada by Environics Research

July 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 May 27 and June 25, 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.

While vaping products have been in the North American market for approximately a decade, data are limited on the knowledge, attitudes and beliefs of Canadians as they relate to vaping products. This public opinion research monitors how the new regulatory regime is affecting consumer behaviour with respect to vaping products and will inform policy and regulatory decision making in the face of a rapidly changing market. Health Canada is interested in better understanding how Canadians are using vaping products and with potential signs of an increase in vaping among youth, this research monitors the opinions and behaviours of this group.

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. It builds upon the previous edition of research conducted in February of 2019 and, as it contains a sizeable sample of youth and young adult respondents, both provides consistent monitoring of these groups over time and allows them to be consistently compared to the larger population of adult vapers.

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;
- Monitoring the progress of how the new regulatory regime may be affecting consumer behaviour with respect to vaping products.

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 2,043 surveys with this target audience between May 27 and June 25, 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 2017 Canadian Tobacco Alcohol and Drugs Study (CTADS). The approach mirrors what was done in the previous edition (February 2019) in order to ensure the results were as comparable as possible. 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 \$148,172.38 (HST included).

Key findings

The results of this research further confirm the differences in use and perceptions of vaping between adults and youth/young adults that were previously uncovered in the February 2019 survey. Adult vapers aged 25 and older 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. In contrast, youth and young adult vapers take a more recreational approach to vaping and are more likely to see it as appealing in its own right: they are more likely to vape because of the flavours (and report greater switching between flavours), because it's fun or they can do tricks, and they have a greater tendency to vape with others in social settings.

This most recent edition of the research also uncovered some changes since February 2019 in how vaping products are being consumed by Canadians. At this point it is unclear whether these differences represent genuine trends, but are worth monitoring in future research:

- The proportion of regular vapers who consider themselves daily vapers increased by four (among nicotine liquid users) and five (among non-nicotine liquid users) percentage points, possibly indicating that vaping is becoming a more permanent part of vapers' lives.
- The proportion of regular vapers who report having never smoked has increased within each age group, meaning that current and former smokers are less represented in the current sample. At this point it is not clear whether this is a function of the sample of vapers included in this survey, or in fact that more people are starting to vape without seeing it as a method of quitting smoking.
- Whereas half (50%) of those who started smoking before vaping in the February edition reported that they now smoke fewer days per week *and* fewer cigarettes per day, the comparable proportion in this edition is only 42 percent. This could be an indication that vaping is becoming more of a complimentary vehicle for nicotine as opposed to an alternative one.

The key findings of each major section of the research are summarized below:

Vaping use and attitudes

- Regular vapers are younger, include a greater proportion of males, and are overrepresented in B.C. and underrepresented in Ontario compared to the overall Canadian 15+ population. Two thirds (68%) vape with liquids containing nicotine and one-third (37%) vape non-nicotine liquids. Just under half (47%) describe themselves as daily vapers, and the majority (54%) have been vaping for more than a year (although youth and young adult vapers are more likely to have picked it up recently). A majority (52%) say they have five or fewer vaping sessions on the days they vape. A plurality of vapers (46%) say they sometimes vape with others and sometimes vape alone, while the remainder are divided between those who mostly vape alone (29%) or mostly vape with other people (23%).
- By far the most popular type of vaping device are those with a refillable tank ('mods'), used by seven in ten regular vapers. Devices with pre-filled cartridges/pods are used by one-third (35%) of regular vapers, but by a higher-than-average proportion of youth and young adults.
- Three quarters (74%) of regular vapers have switched liquid flavours at least once since starting to vape. The most common reason for switching is to experiment with the flavours, but some mention that their

choice depends on their mood or that the flavour choices help them gradually reduce the amount they smoke.

- Vape shops are the main source of 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 to get their vaping products from friends or others. One in three (32%) regular vapers are always or often asked to provide proof of age when purchasing in-store or online - youth (52%) and young adult vapers (60%) are more likely to encounter this requirement.
- Less than half (45%) of regular vapers have tried to reduce how often they vape and one in four (24%) have tried to quit. One in three (33%) plan to quit vaping in the next year, skewing strongly to those who have tried to quit before (65%). Regular vapers also report a high degree of switching between nicotine and non-nicotine varieties and between varying nicotine strengths (both of which are more common among vapers who also smoke).
- The perceived level of harm from vaping is strongly dependent on the presence of nicotine: vapers are more than twice as likely to see nicotine vaping products as harmful to people's health as non-nicotine vaping products. However, both are considered much less harmful than cigarettes. Those who see vaping as harmful most commonly cite lung problems (e.g. popcorn lung) or harmful chemicals in the vaping liquid.
- Reasons for vaping depend on smoking history, with dual users and former smokers most commonly using it for smoking reduction/cessation. Never smokers – most of whom (61%) are youth or young adult vapers - choose to vape because not just because they see it as a healthier option than smoking (every age group cites this as a main reason) but because they like the flavours/smells, find it fun/exciting or enjoy it as a social activity.

Vaping information and advertising

- Six in ten vapers say they recall recent advertising or promotional materials about vaping; this is particularly high among young adults (76%). Recall is most widespread for information about vaping products in general or about a specific brand of vaping device, or links to online shopping. Social media, especially Facebook and Instagram, is the most widely recalled location for this material. This social media material is mostly perceived to be paid content from a company, aimed either at people who already vape or people who smoke cigarettes and are trying to quit (rather than at those who don't currently vape or smoke).

Cigarette use

- Just over half of vapers (56%) also smoke cigarettes and most of these dual users (86%) tried cigarettes first (vs. 12% who vaped first). However, this varies by age: dual use is less widespread among youth vapers (34%), and a relatively higher proportion of this group tried vaping before cigarettes (32%).
- Dual users who smoked first say vaping has reduced their frequency of smoking. The main reason given for continuing to smoke while vaping is that the addiction to cigarettes is just too strong, making it hard to give them up.
- Among dual users who vaped first, smoking has typically increased their vaping frequency. This segment identifies curiosity as the most common reason why they picked up smoking (in addition to vaping), but almost half (47%) could not provide a reason for why they started.

- Vaping products with nicotine play an important role in smoking cessation attempts by dual users and were used by seven in ten former smokers when quitting. Majorities of both former smokers and dual users trying or planning to quit believe it is (or was) important to have a range of vaping flavours available to them for that purpose. Around half (47%) of dual users who are trying to quit smoking sought advice on how to use vaping; one-third (34%) of dual users who are trying to quit or cut down have a specific plan in mind for how to go about doing that.
- Three in ten (31%) vapers are aware of nicotine salts and 16 percent have used them; both awareness and use are higher among youth and young adults than among adult vapers. Heated tobacco products are slightly better known (42%) but no more widely used (17%). Young adults and adults are more likely than youth vapers to be aware of heated tobacco products.

Political neutrality statement and contact information

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