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Social Values and Psychographic Segmentation of Tobacco and Nicotine Users and Non-Users

Executive Summary

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February 2020

This public opinion research report presents the results of an online survey and focus groups conducted by Earncliffe Strategy Group on behalf of Health Canada. The research was conducted from September 2019 to February 2020.

Cette publication est aussi disponible en français sous le titre : Valeurs sociales et segmentation psychographique des utilisateurs et des non-utilisateurs de tabac et de nicotine

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EXECUTIVE SUMMARY

Earnscliffe Strategy Group (Earnscliffe) is pleased to present this report to Health Canada summarizing the results of the quantitative and qualitative research conducted to understand social values and psychographic segmentation of tobacco and nicotine users and non-users.

The Government of Canada made the commitment to reduce tobacco use to less than 5% by 2035 in order to help combat the prevalence of chronic diseases, such as cancer, respiratory ailments, and heart disease. In order to achieve this goal Health Canada created a robust surveillance program capable of pinpointing a variety of statistics related to smoking and vaping; from the number of cigarettes an individual smokes per day, to how old they were when they had their first cigarette or vape. While this data has provided a variety of insights and information with regards to demographics (age, gender, province, income, etc.) there is still limited understanding as to who people who smoke or vape are on a more personal level. The aim of this research was to understand their morals, values, belief systems, health views, etc. The specific objectives were to explore whether or not there are different segments within the smoking and vaping population with whom different messages would resonate stronger than those currently in use. The research focused on vaping, while youth smoking rates are at historic lows, youth vaping is currently increasing at an overwhelming rate particularly among youth 16 and 19, thus Health Canada wanted to further understand this phenomenon. Feedback from this research will help Health Canada understand how to maximize different policies to achieve their 2035 target. The total cost to conduct this research was \$239,989.12 including HST.

In addition to the information objectives, Health Canada needed to ensure each of a variety of specific target audiences were adequately sampled in order to more clearly understand the nuance of opinion by target audience. Each target audience – some of which are not mutually exclusive – had the following target sample sizes:

- At least n=2,000 people aged 15-19;
- At least n=1,000 people aged 15 or older who smoke;
- At least n=1,000 people aged 15 or older who vape;
- At least n=500 people aged 15-19 who vape; and,
- At least n=700 people aged 20 or older who vape.

To meet all of these objectives, Earnscliffe conducted a two-phased research program.

The research began with a quantitative phase involving an online survey of 7,773 Canadians aged 15 and older. The online survey was conducted using our data collection partner, Leger's, proprietary online panel. To achieve the target sample sizes for all target audiences identified, Earnscliffe developed a data collection approach that began with a total of 6,071 interviews collected as a core sample of the general population aged 15 years and older. Subsequently, the following oversamples were collected among each of the audiences listed below in order to meet all of the target audience sample objectives:

- 1595 additional cases among youth aged 15-19; and
- 107 additional cases among people aged 20 years and older who vape.

In the end, each of the target audiences achieved the following sample sizes:

- n=2,013 people aged 15-19;
- n=1,420 people aged 15 or older who smoke;
- n=1,232 people aged 15 or older who vape;
- n=523 people aged 15-19 who vape; and,
- n=709 people aged 20 or older who vape.

The survey was conducted from December 24th to January 21st, 2020 in English and in French. The data was weighted to reflect the demographic composition of the Canadian population aged 15 and older, including the incidence of smoking. Because the online 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. The treatment here of the non-probability sample is aligned with the Standards for the Conduct of Government of Canada Public Opinion Research for online surveys.

Additionally, due to the use of non-probability online opt-in panels for data collection, this survey should not be relied upon for incidence rates of behaviour. For statistical information on prevalence, refer to the Canadian Tobacco, Alcohol and Drugs Survey (CTADS, available at <https://www.canada.ca/en/health-canada/services/canadian-tobacco-alcohol-drugs-survey.html>).

The second phase of research involved a qualitative phase which included a series of fifteen focus groups with three segments of the Canadian population (18+): adults who currently vape but have never smoked, adults who currently vape but formerly smoked cigarettes, and adults who currently vape and smoke cigarettes (dual users). Three sessions were conducted in each of the following five cities: Halifax (February 3, 2020); Montreal (February 4, 2020); Toronto (February 5, 2020); Calgary (February 6, 2020); and Vancouver (February 8, 2020). All groups were 1.5 hours in length. The groups in Montreal were conducted in French, all others were conducted in English.

It is important to note that qualitative research is a form of scientific, social, policy and public opinion research. Focus group research is not designed to help a group reach a consensus or to make decisions, but rather to elicit the full range of ideas, attitudes, experiences and opinions of a selected sample of participants on a defined topic. Because of the small numbers involved the participants cannot be expected to be thoroughly representative in a statistical sense of the larger population from which they are drawn and findings cannot reliably be generalized beyond their number.

The key findings from the research are presented below. Bolded results indicate that the result of the demographic group mentioned is significantly higher (at the 95% confidence interval) than the result found in other subgroups discussed in same analysis.

Understanding of Vaping and Nicotine

- In terms of the perceptions of all respondents, the plurality (31%) feel that vaping products are most commonly associated with both recreational uses, and as something to help people quit smoking. This overlapping of motivations begins to separate somewhat when analyzed on the basis of behaviour. Among those who vape, there are two general categories of people: those who do so as a way to reduce or eliminate their use of cigarettes; and those for whom the activity provides some other benefit or benefits.
- The main reasons why people who vape choose to do so included to quit smoking (26%), to reduce stress/relax (13%), and because of peer pressure/social purposes (11%). The main reasons why people who do not vape with nicotine choose not to included health concerns (33%), to quit smoking or vaping with nicotine (22%), and because they are generally uninterested (17%). Focus group discussions with those who vape reinforced these survey findings and added some colour to the insights. Most described starting out of curiosity and with a friend or friends who already vaped and in nearly all cases, their first experience was using a device owned by someone else. Many participants described appreciating the social aspect and the stress relief vaping provides them. Contrastingly, participants who currently smoke or smoked in the past, were more inclined to describe their motivation as one of smoking cessation, typically as a substitute for some but not all of the cigarettes they would typically smoke each day. These people tended to more often cite particular aspects of vaping that they appreciated: that it more closely replicated the hand-to-mouth motion of smoking; and that it can provide a reasonably similar throat sensation that they seek when smoking. Most who vape started out of curiosity because a friend or acquaintance introduced them to it.
- In terms of health concerns, neither vaping nor smoking are top-of-mind concerns when asked to name the most pressing health issues presently facing Canada, with neither mentioned by more than 1% of respondents. When it comes to vaping specifically, respondents tend to describe their level of knowledge of health impacts as modest at best, but whether in spite of a lack of knowledge or because of it, the perception of harm is fairly widespread. Only 43% of respondents felt they were knowledgeable of the health impacts of vaping products containing nicotine. Even fewer (36%) considered themselves knowledgeable of the health impacts of vaping products containing cannabis, and even less (31%) considered themselves knowledgeable of the health impacts of vaping products containing flavours only. Nevertheless, the majority (69%) felt vaping products containing nicotine were extremely/very harmful. Half (50%) felt products containing cannabis were harmful, and roughly a third (38%) felt products containing only flavours were harmful. Over half (52%) of respondents felt that the health risk of vaping products is the same regardless of the level of nicotine.
- Overall, respondents are somewhat divided over the relative harms of vaping products containing nicotine as compared to cigarettes. When compared to cigarettes, 40% of respondents felt that vaping products containing flavours only were less harmful, while 30% felt the same about products containing cannabis, and 20% felt the same about products containing nicotine. In focus groups, participants tended to add that while the long-term health effects of smoking cigarettes are definitely negative, known and well-established, there is a degree of uncertainty due to a lack of history or evidence of long-term effects related to vaping. Those in groups who currently smoke or smoked in the past were much more adamant that the harms of vaping, whatever they may end up being, are unlikely to be as bad as the harms associated with smoking cigarettes.
- There are some differences of opinion based upon usage behaviours that are worth noting in terms of perceived health risks. Respondents who vape with higher concentrations of nicotine (2%+) are more likely to feel that vaping products containing nicotine are less harmful (a little harmful or not at all harmful) than those who vape with under 2% nicotine, or none at all (**28%** compared to 18% and 7% respectively). Similarly, people

who vape once a month or less were significantly more likely to find vaping products containing nicotine extremely harmful (**20%**) compared to those who vape daily (5%).

- Much of the sense of fear over the health effects associated with vaping appears to have developed relatively recently. Half (47%) felt that their impression of harm associated with vaping products containing nicotine has worsened. Two in five (40%) reported the same of vaping products containing cannabis, and 39% felt the same about products containing flavours only. The main reason impressions of vaping products changed over time was media reports, followed by news of people dying/getting sick from vaping, and finally the idea that vaping causes lung damage/disease. Focus group discussions elicited a widespread sense that emerging stories about lung disease introduced new concerns about what they were putting in their lungs, although those who currently smoke were less inclined to describe themselves as discouraged by this same emerging health issue.
- In terms of addiction, both the quantitative and qualitative phases demonstrated that most understand the addictive nature of nicotine, whether in cigarettes or in vaping products that contain nicotine. That said, there are still many who believe that even vaping products that do not contain nicotine are addictive. Vaping products containing nicotine were seen by far as the most addictive (83%) followed by products containing cannabis (67%), and lastly products containing flavours only (50%). When people who vape were asked if they consider themselves addicted, half (50%) reported being either very or a little addicted. Respondents who self-assessed themselves as very addicted to vaping were much more likely than others to feel that vaping products containing flavours only (28%) or containing nicotine (62%) are extremely harmful. In the focus groups, it should be noted that virtually none said they were vaping products that do not contain nicotine. That noted, there were many participants who felt their vaping was an addiction, some described it as “already” being an addiction, since their tenure was a few years or less. Those in the groups who described themselves as addicted often resented that fact and felt that an addiction to nicotine was more problematic than being addicted to something like chocolate, given the physical discomfort of withdrawal that comes with attempting to quit nicotine and which they believe is not involved when quitting an addiction to something like chocolate.

Packaging

- While most focus group participants describe their initial contact with vaping as being in a social setting and not involving packaging, it was clear from the groups and is clear in the survey results, that there is fairly widespread exposure to packaging among those who vape. Three-quarters of respondents (75%) bought/received their vaping devices in a box. And two-thirds (65%) bought/received their pods/liquids in an original box. Roughly a third (30%) of respondents who vape keep their device in its original packaging. This number grows to 39% with pods/liquids. Majorities of all age groups discard packaging although those 25 years of age or older are slightly more likely to keep their product in its original packaging (34%).
- Respondents who vape daily were much more likely to say their vaping device (**96%**) or pods/liquid (**79%**) came in a box, compared to those who vape once a month or less (66% and 62% respectively). In focus group discussions, those who vape less frequently tended to include many who only vape socially and a few who still only vape products owned by others, thus limiting their exposure to packaging.

Current and Past Behaviours

- As this survey involves a non-probability sample, any results about behaviour are useful for identifying those who behave in one way or another and enabling comparison of groups of respondents based upon behaviour, but the incidence results are not reliable measures of the proportions who do so. For statistical information on prevalence, refer to the Canadian Tobacco, Alcohol and Drugs Survey (CTADS, available at <https://www.canada.ca/en/health-canada/services/canadian-tobacco-alcohol-drugs-survey.html>).
- Given the large survey sample and the oversampled populations, the subsets of respondents identified by behaviour provide ample cell sizes for detailed statistical examination. One in five respondents (19%) have smoked cigarettes in the past 30 days, one in ten (9%) have vaped with nicotine, 6% have vaped with flavours only or vaping products that they were unsure of the nicotine content, and 7% have vaped with cannabis.
- Frequency and duration of smoking are both much higher than for vaping. Of respondents who have smoked in the past 30 days, over half (53%) did so every day, and the majority have been smoking for over 10 years (56%). Of the respondents who have vaped with nicotine in the past 30 days, a quarter (24%) did so every day, and the plurality (37%) have been vaping with nicotine for less than a year. The plurality of respondents who vape do so once per day (17%), however 13% vape more than 10 sessions per day.
- Among those who currently neither smoke nor vape, there is a significant group with experience with cigarettes, but much fewer with experience vaping. Of respondents who have not smoked or vaped with nicotine in the past 30 days, two out of five (39%) have smoked in the past, and 8% have vaped with nicotine in the past. Given the years that each behaviour has been possible, it should be expected that the behaviour that has a longer history has a greater proportion with experience.
- In terms of what it is that people are vaping, nearly all who vape are vaping flavours (93%) and most are vaping products that contain nicotine (67% of those who solely vape, and 84% of dual users). With regards to vaping devices used, the most common device was the one with a tank that you refill with liquid; 70% of respondents have used this device before. The second most used was the device with pre-filled pods/cartridges (50%), followed by disposable devices (36%). Over half of those who vape do so with 2% or higher nicotine concentration (58%), and a third (32%) do so with more than 20mg/ml nicotine concentration. A third of respondents have used nicotine salts before (30%), and a fifth (19%) have heard of them but never used them. Of those who have used nicotine salts, opinions are split; 34% prefer nicotine salts, while 33% prefer vaping with nicotine but not nicotine salts.
- The use of flavours is extremely common and for many, a key factor influencing their behaviour. Of all respondents who vape at all, only 2% say they vape an unflavoured product, whether it contains nicotine or not. The most popular flavour is fruit (30%) followed by mint/menthol (17%), and tobacco (11%). In focus groups, participants described the flavours as appealing, that they tended to have developed an affinity to one or more. Some participants said they would not vape at all if there were no flavours and several of the focus group participants who smoke indicated some discomfort with the concept of vaping without flavours. A few of these individuals offered that the flavour is one of the aspects that helps them choose to vape instead of smoke a cigarette.

- Of those who have tried to quit smoking, equal proportions (19% in each case) have tried vaping with nicotine or using a nicotine replacement therapy (e.g., nicotine gum, nicotine patch, nicotine inhaler, etc.). Slightly fewer (12%) indicated having tried vaping without nicotine. One in four (26%) said they tried other ways of quitting smoking. For those who have tried vaping in an attempt quit smoking but ultimately returned to smoking, the most common reasons they went back to cigarettes is because it is hard to quit (17%), that vaping not working/satisfying needs/not getting the same feeling (16%), or they desired the effects they got from cigarettes (i.e. stress reduce/relaxation) (9%). For those who attempted to quit by using vaping products but have gone back to smoking, when asked what method they would use to quit smoking in the future, the majority of survey respondents opted for other ways (63%), though roughly half (48%) said they would try a nicotine replacement therapy, and less than a third (30%) would try vaping with nicotine. The focus groups demonstrated fairly clearly that people who currently smoke and formerly smoked who vape now are largely doing so as a means to reduce or eliminate their use of cigarettes. The impact it has had on their smoking varies with some crediting vaping with helping them quit, others with helping them cut down on smoking and others indicating that vaping nicotine has added to their behaviours without reducing any cigarette consumption.

Psychographic Indexing of Nicotine Behaviours

- The survey contained numerous variables specifically designed to enable psychographic analysis behaviours. These included self-identification of personality traits, values, life goals and activities that people enjoy in their spare time. Comparing the propensity for one behaviour or another among those who self-identify with a particular psychographic characteristic with the overall propensity for that behaviour, index scores were created to identify linkages between behaviours such as smoking and vaping and each psychographic characteristic. The results demonstrate there are clearly linkages relating psychographics to each of four behaviour categories: exclusively smoking; exclusively vaping; dual use; and, doing neither. The dataset allows for any number of behaviours or subsets of the population to be profiled in this way.
- The people who are more likely to be **only smoking** include:
 - Those not satisfied with their life, feel like they are not making progress financially and describe themselves as depressed;
 - Those who value loyalty and respect tradition;
 - Those who fail to identify a life goal; and
 - Those who identify hunting/fishing and drinking as things they like to do.
- The people who are more likely to be a **dual user** include:
 - Those not satisfied with their life, feel like they are falling behind financially, and those who have an optimistic outlook;
 - People describe themselves as being fashionable, trendy, hedonistic, experimental, depressed, excitable, lazy, moody, neurotic and a follower;
 - People who value being adventurous or creative;
 - Those who want to be famous and want to have a clear career path; and
 - Those who identify drinking, texting, performing, gaming, and hunting/fishing as things they like to do.
- The people who are more likely to be **vaping only** include:

- Those who have an optimistic outlook and are neither satisfied nor dissatisfied with their life;
- Those who pay little or no attention to current events;
- People describe themselves as being hedonistic, trendy, fashionable, lazy, experimental, neurotic, bubbly, moody, modern, anxious, stressed, depressed and a follower;
- Those who value being adventurous and successful;
- Those who want to be famous, want to have a clear career path, who want peer recognition, want a full-time steady job and want to get married or have a life partner; and
- Those who identify texting, drinking, shopping, gaming visual arts, social media, performing and playing sports as things they like to do.

Research Firm:

Earncliffe Strategy Group Inc. (Earncliffe)

Contract Number: HT372-192982/001/CY

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I hereby certify as a Representative of Earncliffe Strategy Group that the final deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

Signed:

Date: February 24, 2020

Doug Anderson
Principal, Earncliffe