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Vapers Online Survey to Measure Attitudes and Behaviours Regarding Vaping Over Time (2019 to 2020)

Executive summary

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Vapers Online Survey to Measure Attitudes and Behaviours Regarding Vaping Over Time (2019 to 2020)

Final report

Prepared for Health Canada by Environics Research

June 2020

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 March 25 and April 14, 2020 with Canadians aged 15 and over who are vapers and participated in the February or June 2019 waves of the Health Canada Vapers Online Survey.

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Executive summary

Background and objectives

The Tobacco and Vaping Products Act (TVPA) came into force in May of 2018 and created a new legal framework for regulating vaping products to protect young persons from nicotine addiction and inducements to tobacco use, while allowing adults to legally access vaping products as a less harmful alternative to tobacco.

Currently, there is limited understanding of how the transition between products occurs among people who are smoking and using vaping products at the individual level. This research explores changes in behaviour over time among those who identified as regular vapers in the 2019 waves of the Health Canada Vapers Online research, including “dual users” (people who smoked and vaped): are they continuing to dual use, returning to using cigarettes only, successfully completely switching, or have quit nicotine altogether.

The main objective of this research was to understand patterns of use over time at the individual level with respect to vaping products. The research also gathered attitudes and behaviours of Canadians who are regular vapers aged 15 years and older with respect to vaping products. Specific research objectives include, but are not limited to, the following:

- To measure changes in patterns of use among regular vapers over time;
- To understand changes in patterns of dual users over time;
- To measure Canadian regular vapers’ level of awareness and knowledge around vaping products;
- To gather information on Canadian regular vapers’ behaviours with respect to vaping products, including product evolution;
- To gather information on the vaping devices and e-liquids currently being used by Canadian vapers.

Methodology

To address the research objectives, a quantitative Return to Sample (RTS) online survey was conducted with Canadians aged 15 and older who participated in the February and June 2019 waves of the Health Canada Vapers Panel online survey. All of those who completed one of the earlier surveys were invited to participate in the 2020 follow-up.

Each respondent was classified as a **regular vaper** if they have vaped at least once a week for the past four weeks and **current smokers** are those who have smoked daily or occasionally in the past month. Respondents who were both regular vapers and current smokers were classified as **dual users**. All of those invited to participate were identified as regular vapers in 2019.

A total of 4,018 invitations were sent and 992 respondents completed the 2020 survey (a response rate of 25%). The survey was conducted using the same panel sample sources as the 2019 studies between **March 25th and April 14th, 2020**. This means that this survey was fielded while most parts of Canada were under shutdown due to the COVID-19 pandemic. No quotas were used to allow every potential participant to respond. Weighting was used to match respondents to the *2017 Canadian Tobacco Alcohol and Drugs Study (CTADS)* study in terms of region, gender and age to maintain demographic consistency.

The age groups presented in the report are defined as follows: youth (15-19 years old), young adults (20-24 years old) and adults (25+ years old).

The original sample sources (and, therefore, the 2020 sample) was drawn from among panels of individuals who have agreed to participate in online surveys. 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.

Please note: this sample cannot be considered representative of regular vapers as a whole, since it excludes individuals who became regular vapers between 2019 and 2020 (i.e., no “new” vapers were invited to the survey).

Contract value

The contract value was \$78,194.49 (HST included).

Key findings

This research explores changes in behavior over time among those who were identified as regular vapers in 2019 and responded to the follow-up 2020 survey (n=992). Using the operationalized definitions of regular vapers and current smokers within this study, substantial movements among behavioural groups were observed. Half of respondents (54%) have changed either their vaping or smoking status or both, since they were surveyed in 2019. Mapping these shifts in behaviour identifies groups which are important to Health Canada (the proportions cited in the bullets below are based on total sample for ease of interpretation):

- **Status Quo Dual Users (30% of respondents):** those who continue to both vape and smoke as they did in 2019. This group comprises people who are explicitly using vaping to try to quit smoking as well as some who vape for other reasons. This is the single largest group, representing three in ten of all respondents.
- **Quit Smoking (former dual users who now vape only, or neither smoke nor vape – 11%):** those who have transitioned away from smoking to vaping only (6%) or to using neither (5%).
- **Relapsed Smokers (former smokers who are now smoking again, either alone or with vaping – 5%):** This group is made up of former smokers who were (only) vaping in 2019, but are now smoking again, indicating they have relapsed to smoking. A slightly higher proportion of this group are now dual users (3% of total), while the rest are now smoking again but no longer regularly vaping (2% of total).
- **New Smokers (never smokers who have started smoking, either alone or with vaping – 8%):** people who in 2019 were regular vapers only and had never smoked, who now do, suggesting that vaping may be a step for some to smoking. A slightly higher proportion of this group are now dual users (5% of total), while the rest are now smoking but no longer vaping (3% of total).

In total, 13 percent of the 2020 sample were not smoking in 2019 but are now doing so. This offsets the 11 percent of the 2020 sample who are previous dual users who gave up smoking; as a result, the overall smoking rate within the total sample remains roughly the same (58% in 2019 and 60% in 2020).

Underlying these findings, however, is some fluidity in behaviour. Respondents have been placed in discrete groups of regular/former vapers and current/non-current smokers based on this point in time, while their responses throughout the survey indicate their behaviours may be situational or occasional rather than

permanent. For instance, some former smokers who have relapsed say they smoke as “an occasional convenience” (despite their smoking use being sufficiently high to be classified as current smokers, meaning they have smoked within the past 30 days). Another example is that while four in ten are no longer regular vapers (suggesting they have, in fact, quit), a small proportion (3% of total sample) are still vaping occasionally (but less often than once per week in the past month). Moreover, many respondents are also currently attempting to quit either vaping, smoking or both, indicating shifts in their use of these substances that are not easily captured at a single point in time.

Additional findings of the research are summarized below:

Vaping Behaviour

- The 60 percent of respondents who are still regular vapers in 2020 are more likely to have vaped with nicotine in the past month than did all regular vapers in 2019 (76% and 63%, respectively); this suggests that the 40 percent who stopped regularly vaping skewed (previously) to non-nicotine liquids. Currently, vaping with nicotine is most widespread among status quo dual users (81%) and least so among continued vapers only (67%). Relatively few regular vapers report having increased the nicotine concentration of their vaping liquid over the past six months (14%), the main reason being to increase their enjoyment from vaping.
- Approximately half of regular vapers (53%) use one device; the minority who use multiple devices (42%) do so for the novelty or the ability to alternate between flavours. Juul is by far the most popular brand, used by a third of all regular vapers in 2020 and four in ten or more youth (45%) and young adult (41%) vapers. Most (82%) say they have not switched brands since 2019; similarly, reported spending on devices and liquids remains static at an average of \$53 for devices/components each month and \$52 for liquids.
- Flavour preferences have remained stable since 2019. Fruit flavours continue to be preferred by all age groups, with tobacco flavour a close second among adult vapers.
- Vaping and smoking are considered similarly important in the day-to-day lives of their respective users, and dual users do not value one activity/substance more than another. However, there is a clear difference in the stigma felt by smokers and vapers: smokers more often feel negatively judged for their behaviour (75%) than do vapers (57%), a pattern that holds true among dual users (73% for smoking and 60% for vaping).
- While cigarettes remain perceived as the most harmful to health, perceptions of harm from vaping have increased since 2019. The increase in perceptions of harm is evident both for vaping products with (from 72% saying they are harmful in 2019 to 77% in 2020) and without nicotine (from 33% in 2019 to 49% in 2020), although nicotine products continue to be viewed as more harmful than non-nicotine products.
- Among regular vapers, half (48%) have ever tried to quit vaping, including one-quarter (24%) who are currently trying. However, only one in ten regular vapers are both trying to quit **and** describe their attempt as 'very serious.'

Smoking among Dual Users, New and Relapsed Smokers

- The results suggest that vaping helps dual users reduce their frequency of smoking and daily number of cigarettes smoked, both of which are lower than among smokers who stopped vaping since 2019. By comparison, new and relapsed smokers tend to be occasional (rather than daily) smokers and report a relatively lower number of cigarettes per day. In terms of self-perceptions, a majority of these new and relapsed smokers see themselves as primarily vapers (52% and 53%, respectively); in contrast, status quo dual users tend to see themselves as both a vaper and a smoker (66%). Both new and relapsed smokers say they are smoking (again) mainly to cope with stress, but also from being around others who smoke.

- Dual users commonly vape at times and places where they cannot smoke: on average, they do so four times a day. This is more common amongst relapsed smokers (average of eight times per day).
- Dual users who are new smokers give varied reasons for why they vape (including to reduce stress and because their friends vape), with reducing or quitting smoking being relatively minor reasons for doing so when compared to other types of dual users.

Vaping As Smoking Cessation

- A major theme among regular vapers is the use of vaping to cut down or quit smoking. Reducing or eliminating cigarettes is the main reason for vaping among status quo dual users and relapsed smokers; despite their use of vaping for this purpose, status quo dual users say they are still smoking from habit and the difficulty of breaking their addiction. On a similar note, regular vapers who have successfully quit smoking at any time in the past say they still vape as an alternative to smoking and because it helps them avoid relapse.
- The difficulty inherent in quitting smoking is evident in the data. Most current dual users are either already trying to quit (39%) or plan to quit smoking in the future (47%). However, only three in ten quit attempts by current dual users are described as very serious, and very few (11%) are planning a quit attempt in the immediate future (within the next month). Dual users who are new smokers are least likely to be currently trying to quit smoking, but most likely to be planning to quit in the next month.
- Despite the relatively widespread desire among dual users to quit smoking, relatively few appear well-prepared to do so. No more than one-quarter say they are very likely to use any type of cessation aid, including vaping products with (22%) or without nicotine (20%), nicotine patches (17%) or nicotine gum (19%). Four in ten (40%) have received advice or information on how to use vaping to quit, and only one-third (34%) have a specific strategy for using vaping to replace smoking in their quit attempt.
- By comparison, the small group that has successfully quit smoking since 2019 (regardless of current vaping status) most commonly used vaping products with nicotine to do so (46%), as well as a variety of other methods including non-nicotine vaping products and nicotine gum.

Successful Vaping Cessation

- Of the total sample, four in ten (40%) reported that they have quit vaping since 2019 in the 2020 survey. Among these, concerns about the health impacts of vaping and the negative media coverage are cited as their primary reasons. Three in ten (28%) received guidance or advice on how to quit vaping, with the most common messages being that it is harmful and they should quit vaping cold turkey. A majority (59%) of this group employed a strategy of reducing their frequency of vaping to help them quit, while a quarter (25%) lowered their nicotine strength. Half (52%) did not use any cessation aids to help them quit, but this skews to non-smokers who have quit vaping over current smokers who quit vaping.
- Most of those who no longer vape say stopping was easy (65%), although only one in four say it was very easy (28%); on average, they required two attempts to quit vaping. Current smokers found it easier than non-smokers (70% and 59%, respectively). Among those who have quit both smoking and vaping in the past, there is no comparison: a majority (55%) say quitting vaping is easier and almost none (2%) say quitting smoking is easier.
- For those who have successfully quit vaping, the most common indicators are a lack of cravings (26%) and the fact that they have refrained from vaping for a long period of time (21%); a third say that it may be too early to tell or can't say how will know they have quit successfully (33%).

Cannabis Use

- More than half of all respondents (56%) have used cannabis in the past 30 days. Cannabis use is more widespread among regular vapers (61%) than among former vapers (50%), and is particularly high among new smokers (75%), suggesting that new smokers (who skew younger) may represent a higher-risk group who are using and/or experimenting with multiple substances.

Political neutrality statement and contact information

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