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# Youth and Young Adults Vaping Segmentation

## Executive Summary

Prepared for Health Canada

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Canada 

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This public opinion research executive summary presents the results of an online survey and focus groups conducted by Earnscliffe Strategy Group on behalf of Health Canada. The quantitative research was in field from January 9<sup>th</sup> to 28<sup>th</sup>, 2024, and the qualitative research was conducted on March 25<sup>th</sup> and 26<sup>th</sup>, 2024.

Cette publication est aussi disponible en français sous le titre : Segmentation du vapotage chez les jeunes et les jeunes adultes

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## Executive summary

Earnscliffe Strategy Group (Earnscliffe) is pleased to present the following executive summary to Health Canada summarizing the results of the quantitative, qualitative, and segmentation phases of this study on youth and young adult vaping behaviours.

### Background and objectives

Recent evidence from the Canadian Student Tobacco, Alcohol and Drugs Survey 2021-22 (CSTADS 2021-22) and the Canadian Tobacco and Nicotine Survey (CTNS 2021) have yielded a variety of new insights on the behaviours and motivations of youth with regards to vaping. The data from CSTADS shows the rate of students grades 7-12 who have ever vaped, as well as those who have vaped in the past 30 days, has somewhat stabilized from 2018-19 to 2021-22. While too early to identify a new trend, in this survey cycle, students who identify as female reported both higher vaping and overall substance use in 2021-22, against historical trends.

The data from CTNS suggest that vaping among young people is motivated by peer influence, addiction, the availability of flavours, and for the purpose of stress management, with roughly 33% of youth aged 15-19 reporting that they are vaping to reduce stress.

Youth who vape are not a monolith and can be grouped by substance use behaviours: experimenters, regular users, and dual or polysubstance users. Data from various studies seem to suggest that these segments have distinct characteristics, reasons for e-cigarette use, and needs. For instance, experimenters seem to vape out of curiosity, whereas regular users seem to vape because they enjoy its effects (i.e., head rush, perceived stress relief, managing withdrawal symptoms), and dual/polysubstance users seem to vape as a way to cope with life and poor mental health. From this, we can make certain assumptions about the needs of these target audiences. For example, information about risks and avoiding peer pressure may be more relevant to experimenters than dual users. Dual users, for their part, would likely benefit from information on adaptive coping skills to manage or improve their mental health.

Health Canada is considering approaches to tailoring public education, campaign content, and resources towards different groups of youth that vape. In order to inform this thinking, Health Canada commissioned this public opinion research to update its existing information and to develop a segmentation to better understand the groupings of behaviours and opinions of Canadians aged 13–24-year-olds.

The overall objective of this study was to better understand the segmentations of Canadian youth and young adults aged 13-24 with regard to their psychographic traits, behaviour characteristics, and their values, in order to ultimately better reach these audiences with messaging on making informed choices about vaping and how to quit. With this in mind, the results of this report will help better inform decisions on strategy, target audience(s), key messaging, and activities for future public awareness and education campaigns, including a focus on helping young Canadians quit vaping.

In addition to building on work done by Earncliffe in 2017-18, this project includes several novel research foci, including: polysubstance use; the relationship between vaping and mental health; dependence; teen and young adult values and behaviours; further segmentation of three vaping groups based on behaviour type (non-users, experimenters, and regular vapers); and the introduction of vaping cessation messaging. This research provides evidence-based data and insights to guide Health Canada’s future planning in these areas. The contract value for this project was \$249,836.84.

## Methodology

To meet these objectives, Earncliffe conducted a two-phased approach involving both quantitative and qualitative research.

The initial phase involved quantitative work involving an online survey of 6103 Canadian residents aged 13 to 24 years old, with quotas set to ensure the sample is reflective of the distribution of the population based upon age, gender, and region, to align with the most recent Census information.

All interviews identified respondents as falling into one of three categories: regular vapers (i.e., those who have vaped multiple times in the past 30 days or more); experimental vapers (i.e., those who have vaped once in the last 30 days or less); and those who have never vaped. These were determined in consultation with Health Canada.

The estimated frequencies used to guide the design of this study can be found in the quantitative methodology in Appendix A. The final breakdown of each audience was as follows:

	Regular users	Experimenters	Non-users	TOTAL
Youth 13-15 (n)	374	177	936	1527
Youth 16-18 (n)	258	217	846	1344
Young adults 19-24 (n)	1093	690	1368	3232
<b>TOTAL INTERVIEWS</b>	1725	1084	3150	6103

The quantitative field work was conducted from January 9<sup>th</sup> to January 28<sup>th</sup>, 2024. The survey was offered in English and in French. The average length of interview was 14 minutes.

Respondents for the online survey were selected from among those who have volunteered to participate in online surveys. The data for the general population sample was weighted to reflect the demographic composition of the Canadian population aged 13-24 by region, gender, and age. 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 - Online Surveys. Appendix A provides full details on the survey methodology and Appendix C provides the survey instrument used.

The second phase of this project was qualitative and involved a series of twelve online focus groups on March 25<sup>th</sup> and 26<sup>th</sup>, 2024. The groups were conducted with youth aged 13-18 and young adults aged 19-24. Three groups were conducted in each of the following regions: Atlantic Canada, Quebec, Ontario, and Western Canada. The groups with residents in Quebec were conducted in French; the others were conducted in English. Within each region, groups were divided by age and by reported vaping behaviours. The sessions were approximately 90 minutes in length.

Up to 10 participants were recruited for each group, with the goal that at least 8 be able to participate. In total, 95 people participated in the focus group discussions. Appendix B provides greater detail on how the groups were recruited, Appendix D provides the discussion guides used to facilitate the focus groups, and Appendix F provides the recruitment screener.

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 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.

## Key findings

### Section A: Phase 1 frequencies and key significant differences

#### Substance use and audience identification

- Respondents were grouped into regular vapers (28% of the total population), experimenters (18%), and non-vapers (52%). For the purposes of this study, vaping refers exclusively to nicotine products.
  - Regular vapers are those who have vaped multiple times in the past 30 days or more. Experimenters are those who have both vaped in the past 30 days as well as those who have vaped previously, but not in the past 30 days.
- Regular vapers are more likely to qualify as regular users of all other substances tested (smoking cigarettes, cannabis, alcohol, opioids, and illegal drugs) than experimenters and non-vapers. This is true across the three age brackets examined (13-15, 16-18, and 19-24).
- Roughly equal portions of all respondents aged 13-24 who smoke cigarettes have tried to quit smoking and were successful (34%), have tried to quit and were unsuccessful (32%), or have never tried to quit (29%).
  - At almost half (47%) saying so, those who have experimented with vaping are the most likely to have successfully quit smoking cigarettes.
  - By contrast, regular vapers in all age brackets who also smoke cigarettes are the least likely to say that they have tried to quit cigarettes and were successful.
  - When asked specifically about the tools used to attempt to quit smoking cigarettes, more respondents across all ages said they had tried to quit by vaping with nicotine (with 47% saying so) than using a nicotine replacement therapy (44%).
- Compared with smoking cigarettes, respondents are slightly more likely to report their first experience with vaping nicotine to be later in life (although most still saying they tried prior to when they could legally purchase vaping products).
  - Outside of the very few aged 13-15 who report first vaping before the age of 10 (2%), no one in the other age brackets reports starting that young.
- The top reasons that respondents who have vaped say that they first started is because their friends were vaping (43%) or because they were curious (39%). This is true across all age cohorts examined.

- Relatively few say that they started vaping because they did not think they could get addicted (13%), that it is not harmful like smoking (12%), or that they started to quit smoking cigarettes (11%).
- Reflective of the social element of vaping, over half (52%) of respondents report that they vape when they are around friends who do so.
  - Roughly the same number say that it is a coping mechanism for stress (41%) with regular vapers across all ages being significantly more likely to say so than experimenters.
- Among all respondents who vape aged 13-24, alcohol (58%) is the substance most likely to be consumed at the same time as a respondent is vaping. This followed by cannabis (39%) and smoking a cigarette (35%).
  - Regular vapers are more likely to smoke a cigarette than experimenters across every age bracket.
- A third (34%) of those who have ever vaped nicotine say that they have tried to quit and were successful – the same number as those who have ever tried smoking cigarettes and who say they were successful in quitting (34%). Slightly fewer say they have been unsuccessful with quitting vaping than smoking cigarettes (28% versus 32%) whereas more say that they have not tried to quit vaping than smoking (34% versus 29%).
  - Those aged 13-15 who vape are more likely to say that they have tried a nicotine replacement therapy to quit vaping than their older counterparts who are more likely to say that they have not tried to quit vaping in the past year.
  - Experimenters are far more likely to say that they definitely would not, or that it is not likely, that they would take a nicotine replacement therapy in order to quit vaping (61% versus 43% of regular vapers).
- Two-in-five (44%) of those who have ever vaped report that they have hidden their vaping from someone, most commonly from family (74%).
- Half of non-vapers (51%) across all ages say they have been offered the chance to vape. This offer most commonly originates from friends who vape (75%) – something true across all age cohorts.
  - Those aged 13-15 report slightly lower rates of being offered the chance to try vaping (44%) than those aged 16-18 (54%) or 19-24 (54%).

## Psychographic profiling

- This section deals with the psychographic variables through which the segmentation analysis was built. Only some directional results are presented here, with the bulk of the profiling discussed in Section B.
- Regular vapers are far more likely to agree with statements that position themselves as being surrounded by others who drink alcohol (63%) or who use cannabis products (49%) than experimenters or non-vapers.
- Regular vapers are also much more likely to describe themselves as experience seeking (49%), trendy (46%), and rebellious (41%), than experimenters or non-vapers. That being said, experimenters more closely align with regular vapers than non-vapers on these metrics.
- When looking across all ages, non-vapers are significantly more likely to say they are somewhat or very satisfied (75%) with their lives than experimenters (65%) or regular vapers (63%).
  - While non-vapers 13-15 years old (35%) and 16-18 years old (30%) are the most likely to say that they are very satisfied with their lives in their respective age brackets, regular vapers are the most likely to say the same at 31% in the 19-24 age range.
- When asked about overall mental health, regular vapers are more likely to say that it is either excellent or very good (43%) than non-vapers (39%) or experimenters (31%).
  - Two-in-five (39%) of all respondents report having issues with work or school in the last four weeks due to their mental health or emotional state, with experimenters 13-24 being the most likely to say that it is having an impact on them with half (48%) saying so.
  - At three in-five (57%) saying so, regular vapers are by far the most likely to report also using substances other than vaping (e.g., cannabis, alcohol, opioids, other illegal drugs) to cope with poor mental or emotional health.
- Respondents over the age of 15 were asked about their financial situations. Those who regularly vape are significantly more likely to say that they are financially secure (at 22%) than experimenters (12%) and non-vapers (14%).
  - Among regular vapers who are 16-18 years old, half (51%) say they are just getting by financially. This compared with regular vapers aged 19-24 who self-assess as the most financially secure of their age cohort 23% saying they are secure.



## Vaping attitudes and impressions of risk

- Perceptions of the social acceptability of various substances varies widely both within audiences as well as overall. Regular vapers are the most open to all substances mentioned in the survey whereas non-vapers consistently have the most negative views. The one exception is alcohol, which is perceived as broadly socially acceptable across all audiences.
- A plurality of respondents across all vaping categories (26-35%) surveyed say that vaping products that contain nicotine is both a recreational activity as well as an aid to help people quit smoking.
- On the subject of harm, three-in-five (58%) regular vapers say that vaping nicotine is less harmful than cigarettes.
- Regular vapers profess to be the most knowledgeable about the harms of consuming all the substances tested except for smoking cigarettes or drinking alcohol, where they self-assess as only slightly less knowledgeable than experimenters and non-vapers.
- The youngest respondents are the most likely to say that each of the substances tested is extremely or very harmful. As the age of respondents increases, however, they perceive each as less and less dangerous (again, with the exception of alcohol which only a minority view as harmful to begin with).

## Section B: Phase 1 segmentation analysis

- Multivariate analysis was done on the data using cluster segmentation. The most helpful solution was an approach that separated the sample into ten (10) distinct segments based on respondents' agreement patterns on a list of 29 attitudinal statements.
- While the ten segments have some clusters which share similarities, each remains unique in one way another and the uniqueness present specific implications for public health communicators – either in terms of their views on the health risks associated with vaping nicotine, their behaviours, their attitudes, their preferences, or their demographics.
- Based on an assessment of the different traits present in the various segments, each was sorted on a spectrum with one end deemed to be the hardest to reach with vaping messaging and the other end deemed to be the most receptive.
- Among the ten segments there are three which include those who are more rebellious than the average respondent. They represent 29% of respondents:

- **Respondents who have a tendency to seek out risky activities (10%)** are less concerned about health risks, seek out risky or thrilling activities, are more likely to vape nicotine, smoke cigarettes, perceive just about any substance use to be socially acceptable, and are among a circle of friends who use substances. They are not terribly concerned about peer acceptance, issues like the environment or following what is going on in government.
- **Respondents who have a tendency to be thrill-seekers (12%)** are similarly rebellious and, as the name suggest, thrill-seeking. Their vaping and smoking profile is similar to response who have a tendency to seek our risky activities and they, to, tend to think of these as socially acceptable. However, they do care what their peers think, try to be stylish, and listen to their parents and are open to following traditions. They are more interested in following politics.
- **Respondents who have a tendency to push boundaries (7%)** are particularly rebellious and break rules and skip classes more than most. They share a similarly high tendency to vape nicotine and smoke as the other two rebellious segments, but they are the least likely to follow rules. However, while they see smoking and vaping as socially acceptable to a similar degree as the other two segments, they are even more inclined to see cannabis as socially acceptable, while less convinced that is the case for opioids.
- Two segments are somewhat independent, but not as rebellious as the three above. They represent 21% of respondents:
  - **Respondents who have a tendency to be free-spirited (11%)** are not as likely as the above segments to describe themselves as rebellious but have certain independent tendencies such as spontaneity and pursuing adrenaline-producing experiences. They are not as likely as average to vape nicotine or smoke but are not much different than average in describing those activities as socially acceptable, although they are much less likely to say that of opioid use or illegal drug use.
  - **Respondents who have a tendency to be less socially active (10%)** form a segment that is less socially active or civically engaged than most and, although they are more likely than average to smoke and to vape nicotine, they are more inclined to see vaping nicotine as something one does to quit smoking.
- The remaining five segments are all less rebellious and more respectful of authority figures than the previous five segments and as the spectrum progresses, the segments become much less active in using nicotine or other substances and less inclined to think favourably about vaping nicotine. They represent 50% of respondents:

- **Respondents who have a tendency to be independent and face challenges (3%)** are far smaller than all other segments and, while they do not describe themselves as rebellious, they do not care as much about what parents, peers, schools, or society thinks. They are less engaged in current events, traditions, or religion. They are least satisfied with their life, falling behind financially and more inclined to use substances to cope with mental health or emotional challenges. They have a higher incidence of vaping nicotine and smoking but are also most likely to see vaping nicotine as something used to quit smoking.
- **Respondents who have a tendency to be more conformist (11%)** care about what people think, value education, and think life goals are important. They tend not to pursue risky behaviours and, although they are as likely as average to vape nicotine or smoke, they are not as inclined as most of the segments above to describe these behaviours or using other substances as socially acceptable.
- **Respondents who have a tendency to be value-driven (10%)** are one of the younger segments. They are among the least likely to currently be vaping nicotine or smoking. They are highly respectful of tradition and the elderly, and less into wild parties, unpredictable friends, rule-breaking or rebelliousness.
- **Respondents who have a tendency to be careful adventurers (12%)** want to enjoy a healthy, happy, social life, are fairly educated, twice as likely to be part of the LGBTQ2IA+ community and, though they are less likely to feel their mental health is good and more likely to have faced mental health or emotional challenges lately, they are less inclined to use a substance to cope with such challenges. They are less likely than average to smoke or vape nicotine, but they are around the average when it comes to seeing those behaviours as socially acceptable.
- **Respondents who have a tendency to follow the rules (14%)** are the largest and youngest segment and, as the name and age implies, are probably yet to be exposed to opportunities, people and situations where substances may be introduced to them. Currently, they do not tend to smoke or vape nicotine and hold the most negative views towards those activities, as well as towards other substance use. They are not rebellious and instead are respectful of parents and tend to follow rules.
- These ten psychographic segments each present unique target audiences – unique in their attitudes, profile, and behaviours and unique in terms of their communications needs on the health risks associated with vaping nicotine. This will be helpful for prioritizing target audiences and also for seeing that profiles can be somewhat similar to neighbouring segments yet varying progressively across the spectrum in some key respects.

## Section C: Phase 2 focus groups

### Attitudes and behaviours around health/healthy living

- The majority of youth and young adults conveyed that they think about their health and try to live a healthy lifestyle by trying to stay active, eat healthy, get more sleep, and drink more water.
  - Non-vapers also spoke of avoiding behaviours such as using drugs, smoking cigarettes, and vaping to keep healthy; whereas regular vapers or experimenters did not often raise limiting or avoiding vaping to keep healthy.
- For information, advice, or support related to their health, most would typically turn to their family and/or friends first, followed by their family doctor and/or internet searches. Several mentioned they may turn to social media, particularly for exercise workouts or healthy eating tips such as meal prepping and planning.

### Behaviours around vaping and vaping cessation

- Most regular users were introduced to vaping by friends. They spoke of initially being curious, particularly of the flavours, vapour clouds, and tricks, but having developed a dependence very quickly (almost instantaneously).
- Experimental/occasional users tended to have been introduced to vaping while in social settings and say they do it only recreationally in certain social settings such as at parties.
- For non-users, while the vast majority have been asked or pressured to vape, only some have been tempted to try it.
- Interestingly, when asked to complete a projective exercise by writing down an adjective that comes to mind when thinking of vaping, there was a perception difference between the three user types.
  - Most non-users tended to refer to the addictive nature of vaping using words like, “addictive”, “addiction”, or “dependence”. Secondly, they used words that spoke to a sense of derision towards vaping, citing words like, “gross”, “disgusting”, “unhealthy” and “expensive”. Additionally, youth (13-18) cited the words “danger” and “dangerous”.
  - While most experimenters also referred to the addictive nature of vaping, they also introduced words around the recreational and experiential nature of vaping citing words like, “social”, “recreational”, “relaxing”, and “soothing”.

- Unlike the two other audiences, regular users rarely noted the addictive nature of vaping as part of this particular exercise and more often focussed on the experiential nature of vaping citing words such as, “relaxing”, “Zen”, “pleasurable”, and “peaceful”.
- Participants noted a variety of perceived risks associated with vaping including addiction, lung damage and/or cancer, respiratory issues, altered brain development, poor blood circulation, persistent cough, mental health issues, and/or cost.
  - Awareness of nicotine and the addictive nature of nicotine, was universal and significant. Nicotine came up spontaneously in every group and addiction was perhaps the perceived risk most non-users were most afraid of and the aspect of vaping that most regular users were most resentful/regretful of.
- When discussing whether anyone had ever tried to quit vaping, noting most regular users have tried at least once in the past, participants spoke of the difficulty managing nicotine withdrawal.
- In terms of the approaches used to quit vaping, many regular users explained they had initially tried to quit cold turkey, which was met with varying degrees of success.
- For future cessation attempts, most experimenters had the impression it would be easy for them to quit as they vape so rarely. Regular users were a little more split, though, with those who had tried before (cold turkey) tended to think it would be difficult and thought they may be more successful if they took a staged approach by reducing their nicotine levels incrementally or limiting the number of times in the day and amount (number of puffs) they vaped.

### **Communications testing**

- The discussion then turned to participants’ recall and impressions of public awareness campaigns about vaping. The emphasis of the discussion was to gauge reactions to a variety of components of Health Canada’s Consider the Consequences campaign. Participants were shown three print products (some with a poster and mirror cling); four videos; and nine messages.
- With respect to any public awareness campaign about vaping prevention, the vast majority of participants offered that they would like to see more hard-hitting approaches where the health risks are featured graphically front and centre.

### *Print products*

- Reaction to the print products was lukewarm.
- The element of the print products that was the most positively received was messaging that communicated about the health risks associated with vaping. These were understood, credible, and widely accepted.
- The message that vaping can cause lung damage and that metal particles can be found in vapes was the most persuasive as it confirmed one of their concerns about vaping, while the message that the long-term impacts of vaping are unknown was not received all that well as it implied that if the impacts are unknown, they cannot be that bad.
- In terms of the overall look and feel of the print products, most tended to feel they were not all that attention-grabbing or memorable. The look was described as out of date and typical.

### *Videos*

- Reaction to the videos was much more positive and participants seemed to find an element within each video that was of merit.
- The video that seemed to be the most widely well received across all audiences, was the *Teen vaping and nicotine* video. It was described as engaging/captivating, interesting, and sufficiently detailed especially about the risks associated with vaping, including the emphasis on addiction.
- Reaction to the *Vaping: Asking why is important* video was a little more mixed. While they liked the dynamism, music and inspirational (empowerment) messaging, they felt the ad was a little short and disjointed.
  - A few regular users found the suggestion that one could not do all of the activities featured in the ad if someone were to vape to be off-putting and stigmatizing.
- With respect to the *Don't wait to quit smoking* video many participants liked the suggestion that there is always a better day to quit smoking and the emphasis on the impacts of smoking on one's life.
  - But, again, for regular users the suggestion that they would not be able to accomplish many of these life milestones was a little stigmatizing.
- With respect to *The mechanics of vaping* video, the most effective element of this approach was the serious tone conveyed by the music, narrator's voice, and sombre colours but most

were unclear about the point of the ad and did not come away feeling it was meant to deter vaping.

### Messages

- Most of the messages were deemed to be credible.
- As with the videos, most participants appreciated at least one message or some of the words within each of the three messaging themes: empowerment; cessation; and addiction.
- Those who identified as male seemed to gravitate to empowerment messages, while those who identified as female seemed to gravitate to addiction messages.

### Risks of nicotine, including nicotine pouches

- Several participants, and more often regular users of vaping products, had heard of nicotine pouches. Most referred to them by specific brand names and described them as a product category.
- In terms of their understanding of who uses nicotine pouches and for what purpose, there seemed to be some divergent views. Some suggested they were used by people who were trying to quit smoking. Others talked of them being used by younger people, including themselves, as a way to receive nicotine which they found helpful for when they wanted to be alert for an extended period of time.

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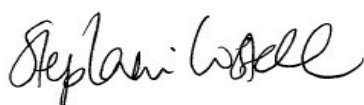
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### Political neutrality statement

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: May 3, 2024



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