

ELECTRONIC CIGARETTES: DATA UPDATE

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Overview

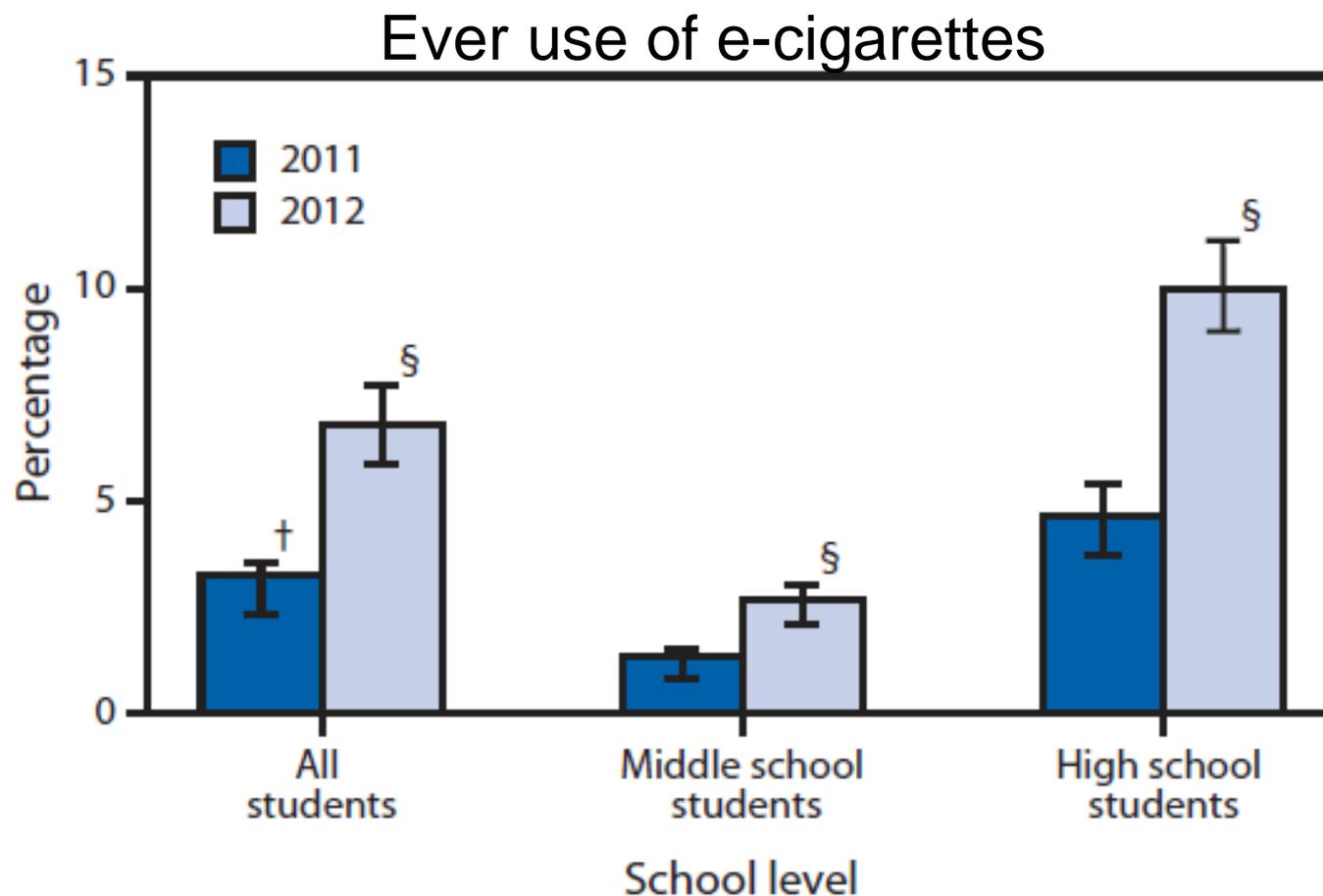
- National awareness and use estimates
- Idaho data
- Idaho e-cigarette market

Observations from the field...

- Increase in the number of:
 - E-cigarette users
 - Businesses
 - Marketing



National Estimates: Youth



CDC. *Notes from the Field: Electronic Cigarette Use Among Middle and High School Students — United States, 2011–2012.* MMWR 2013;62(35):729-730.

National Estimates: Adults

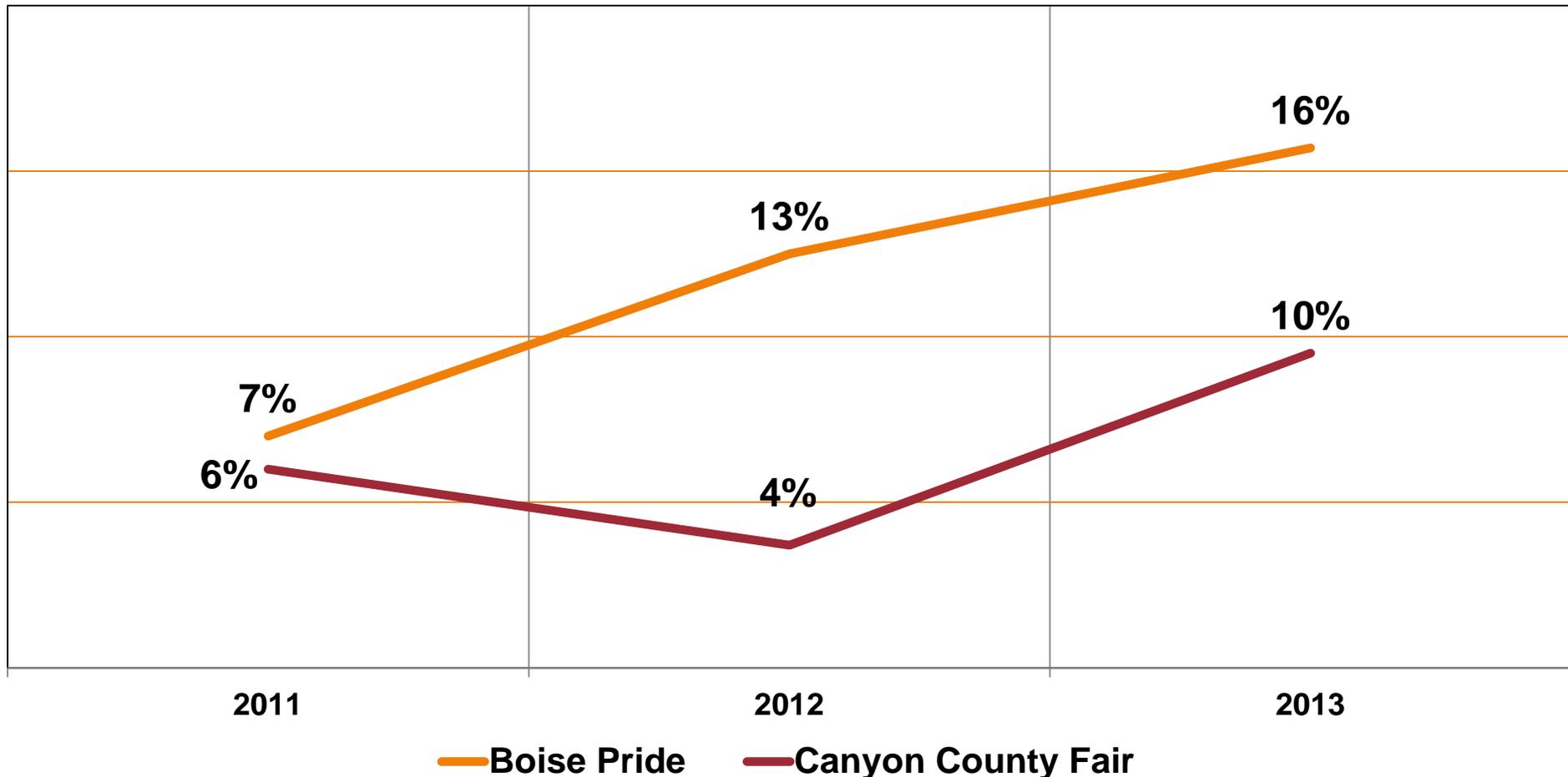
- Awareness
 - 2010: 32.2% (Regan et al. 2011)
 - 2012: 75.4% (King et al., 2013)
- Current use
 - 1.4% - 6.0% (Pepper & Brewer, 2013)
 - Comparable with other smokeless tobacco products
- Associated with...
 - Younger age groups (18-34), current tobacco users

Idaho Data

- Project Filter Event Surveys
- 2013 Media Evaluation
- Idaho Quitline

Idaho Data: Project Filter Event Surveys

Current e-cigarette use



Note: Convenience sample

Idaho Data: 2013 Media Evaluation

- **10%** (N = 899) have ever used e-cigarettes, use associated with:
 - Current smokers (52%) and former smokers (13%)
 - Less than 2% of never smokers
 - Young adults (18-34)
 - HS education or less
 - Lower incomes
- **4%** currently use e-cigarettes

Project Filter: 2013 Media Evaluation

Reasons Idahoans ever used e-cigarettes

- 58% - to cut down, stop smoking, or health reasons
- 25% - experimentation “Tried it one or two times”
- 5% - use where smoking is prohibited
- 12% - other reason

Idaho Data: Quitline

- Data collection began Oct. 2013
 - 11.3% (N=354) of tobacco users currently use e-cigarettes
 - Goal: Determine impact on smoking cessation
 - More data is needed
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- Vickerman et al., 2013. E-cigarette users were less likely to be tobacco abstinent at 7 month follow-up

Idaho e-cigarette market

- Nationally:
 - 1% of U.S. cigarette sales
 - Projected \$1 to 2 billion in sales by the end of 2013

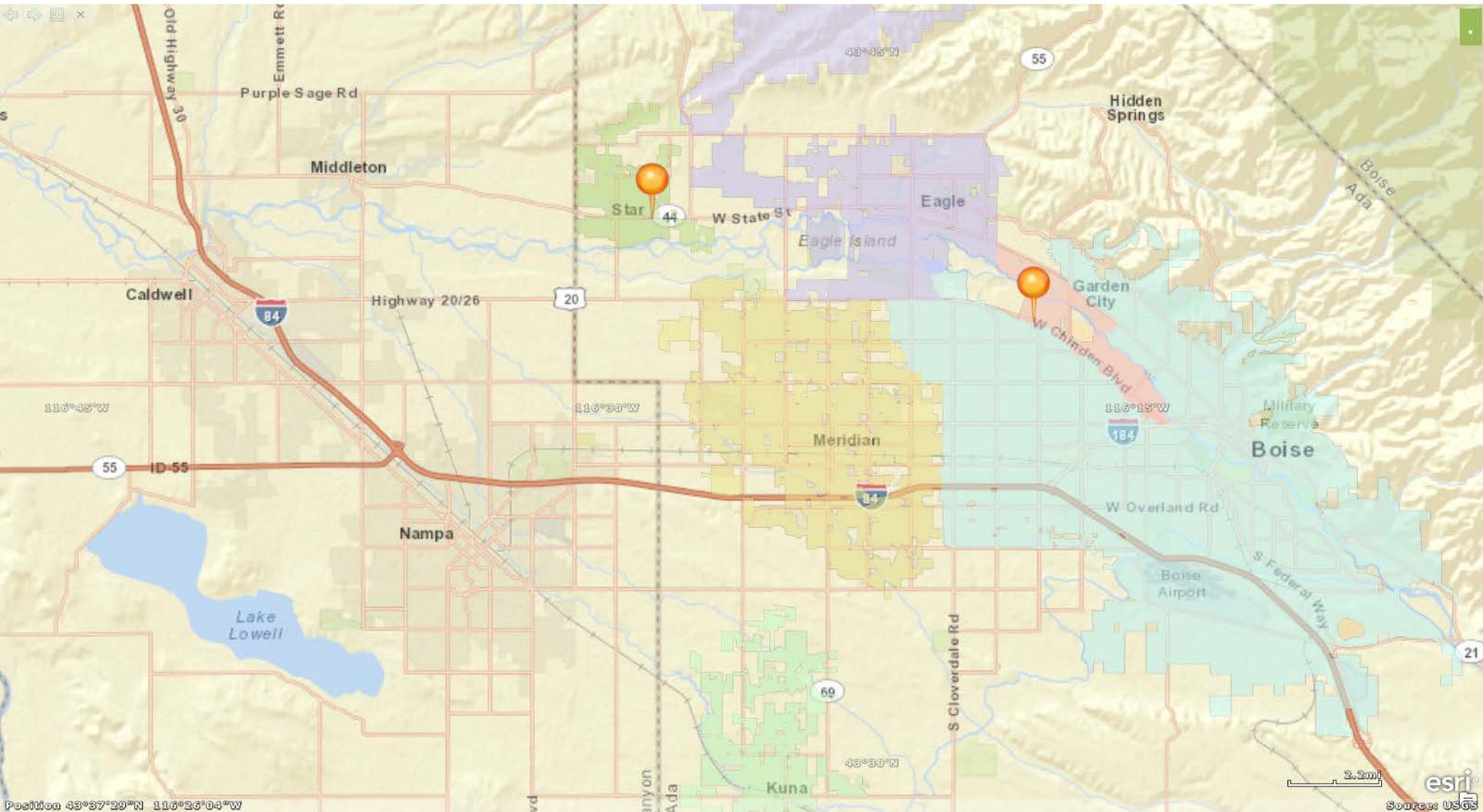
Idaho Market:

- At what rate is the e-cigarette market in Idaho expanding?
 - Businesses dedicated primarily to the sale of e-cigarettes
- Is the “culture” of e-cigarettes established in our state?

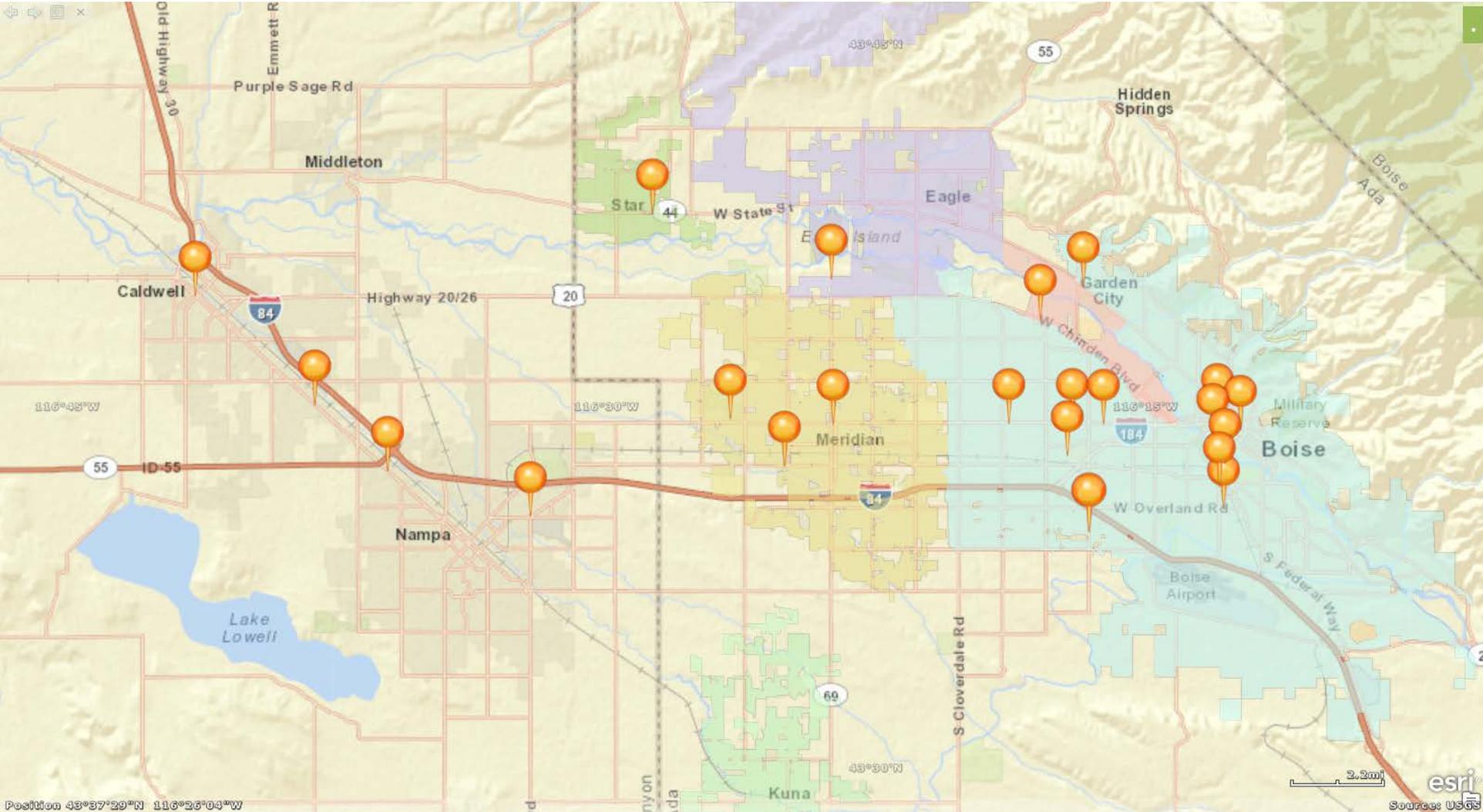
Idaho e-cigarette market

- Search criteria:
 - “Electronic Cigarette” “E-cigarette” “Vape” “Vapor” “Idaho”
- Inclusion criteria:
 - Registered with Idaho Secretary of State
 - Businesses dedicated primarily to the sale or distribution of e-cigarettes
 - Established proof of concept (physical address, website, social media)
- Estimates are likely conservative
- Exclude traditional point-of-sale (Gas stations/convenience stores), the majority of which already sell e-cigarettes

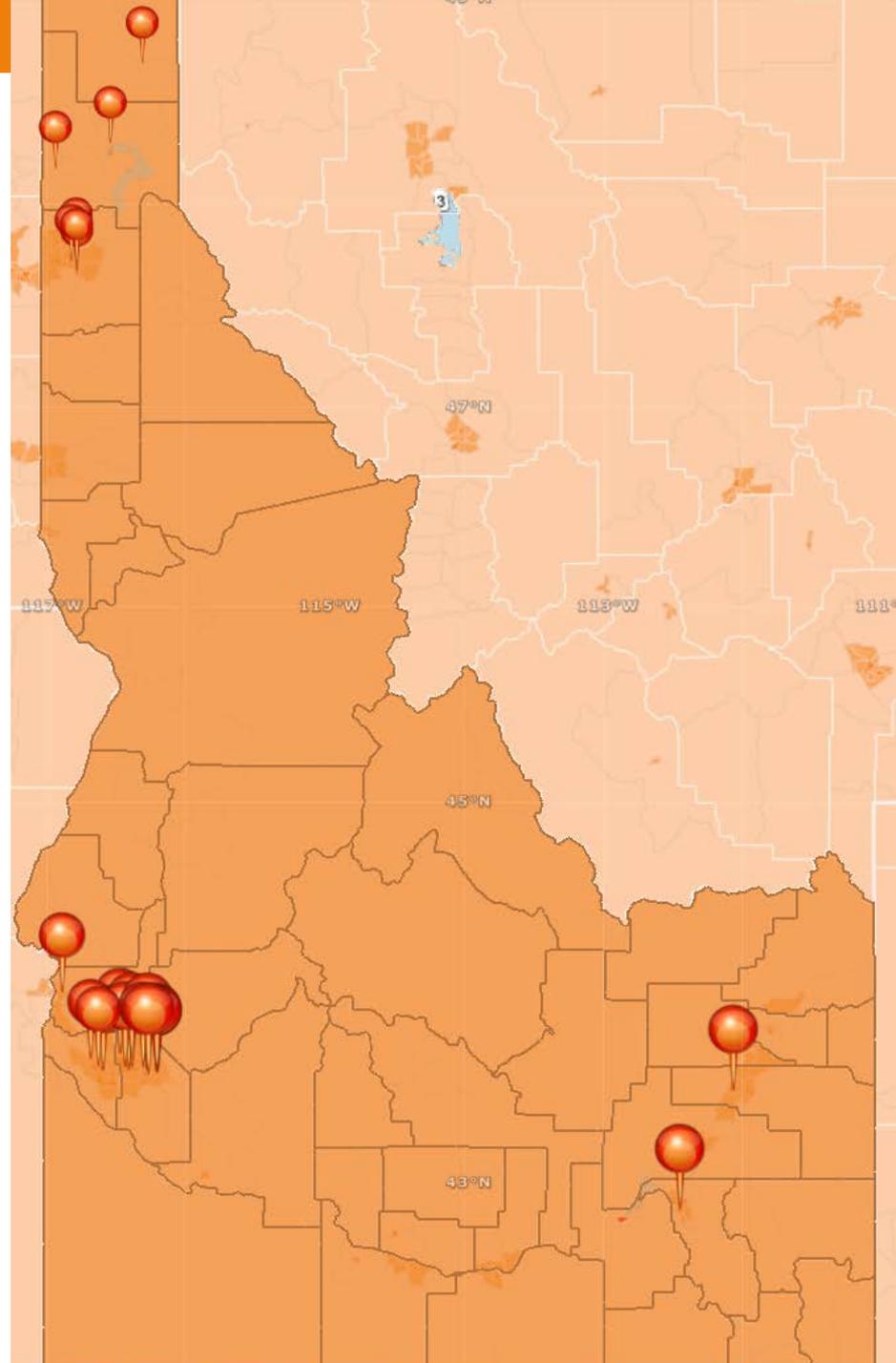
Treasure Valley e-cigarette retail stores, 2010



Treasure Valley e-cigarette retail stores, 2013



E-cigarette retail stores, Idaho 2013



E-cigarette market in Idaho

- Of identified e-cigarette retail stores in Idaho:
 - 2010 = 3 est.
 - 2013 = 33 est.
 - 47% can legally operate without a tobacco permit
- Of identified e-cigarette retail stores, online, and wholesalers in Idaho:
 - 81% established since 2012
 - 55% retail, online, and wholesale distributors can legally operate without a permit

E-cigarette market in Idaho...

Is here to stay

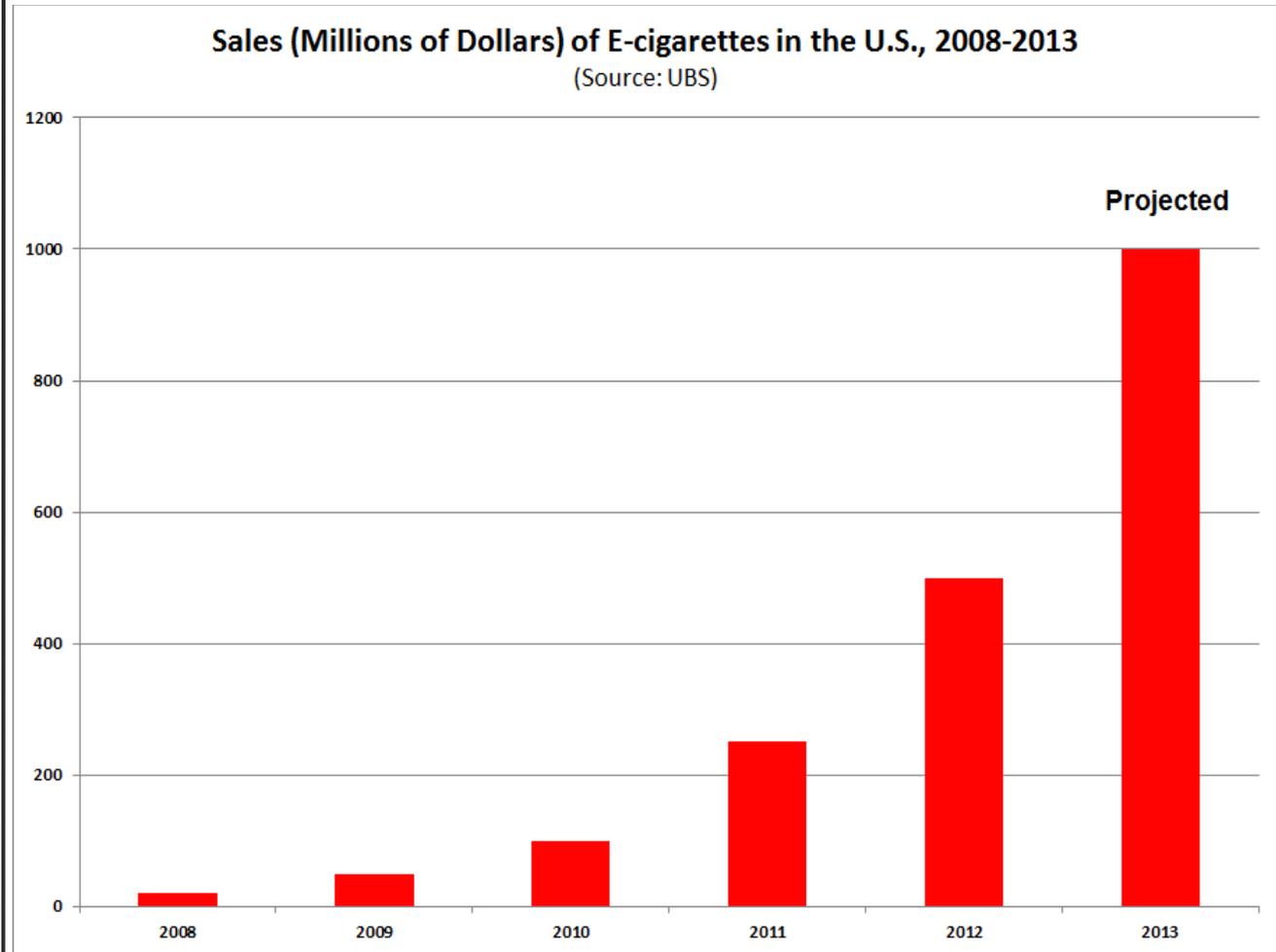
- Challenging to estimate sales – new market, expanding rapidly
- Marketed as delivering the advantages of nicotine without the health risks
- Established user base – smokers
- Relatively unregulated...for now

In 2014, all of the Big 3 will be in the market

RJ Reynolds
- Vuse

Lorillard
- Blu

Phillip Morris
- MarkTen



Summary:

- Electronic cigarettes are likely here to stay
- Electronic-cigarette stores reflect developing culture/demand for reduced-risk products
- Increasing market, big push from small and large businesses
- Market clearly leaning towards people who use traditional cigarettes
- Dual use? (2014 Idaho Adult Tobacco Survey, 2014 BRFSS)