

The evolution of the U.S. vaper, October 2015



Description

ECigIntelligence's analytical study of 15,000 e-cigarette users in the United States explores consumer survey data on national, regional, and state-by-state vapour tank-mod (VTM) preferences, as well as patterns in consumption of e-liquid, nicotine, and tobacco cigarettes. It also provides insight into the changing purchasing path of consumers across all major U.S. distribution channels.

Established in 2007, E-Cigarette Forum (ECF) is a global online e-cigarette community comprised of more than 230,000 registered members with website traffic surpassing 1 million unique visits per month. ECigIntelligence's statistical analysis of U.S. consumer survey data collected from 7,222 respondents in 2015 and 7,707 respondents in 2014, evaluates key longitudinal consumption and purchasing trends by gender, age, and length of daily e-cigarette use. Year-on-year form factor preferences and dollar spend are evaluated for users of cigalike, eGo-style, mod-style, and mechanical devices on a national, regional, and state-by-state basis.

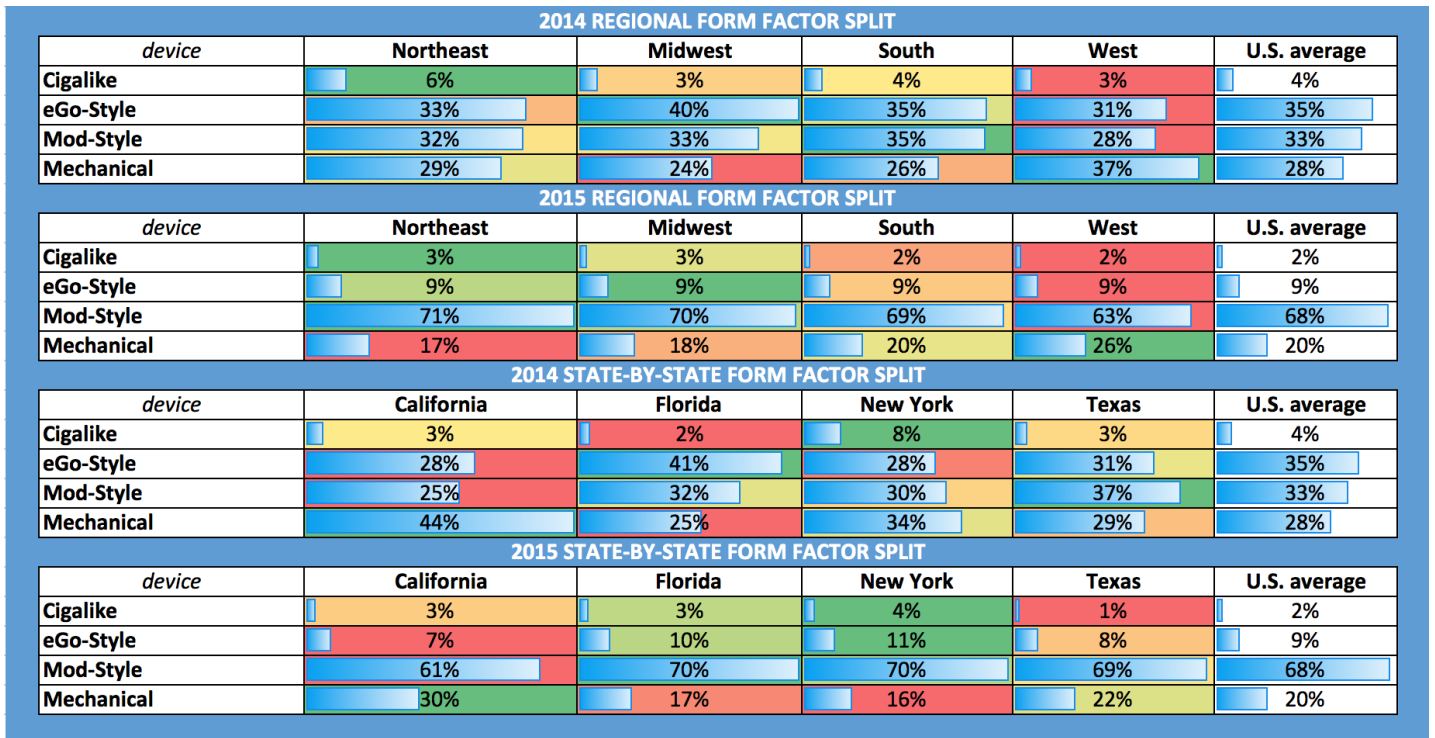
Additionally, the study provides insight on consumer preferences of e-liquid flavors, nicotine strengths, and VG/PG ratios, with special attention given to four major U.S. e-cigarette markets: California, Florida, New York, and Texas.

Executive summary (extract)

- **2014 vs 2015 E-Cigarette Forum (ECF) U.S. consumer survey.** Consumer surveys in 2014 and 2015 by E-Cigarette Forum, a large and well established online e-cigarette community, indicate major shifts in the U.S. e-cigarette market. Although this data cannot be considered statistically representative of the U.S. population as a whole, it is highly insightful - particularly giving direction as to the way the market is moving.
- **The most drastic shift in form factor preferences we've seen to date occurred in 2015.** While eGo-style, mod-style, and mechanical devices each comprised approximately a one-third share of the hardware market in 2014, box mods have since grown substantially in popularity and are currently used by nearly 70% of the surveyed U.S. vaping population.
- Of the 7500+ U.S. consumers polled in 2015, **fewer than 5% of respondents used the cigalike**, suggesting that this product type is becoming an almost negligible part of the market. Surprisingly, there was a 60/40 split among those cigalike users favouring disposables over rechargeables. New York state was consistently identified as one of the top markets for disposable and rechargeable cigalikes year-on-year.
- **Improved innovation in sub-ohm tanks (with pre-built atomisers/coils) has been a catalyst for significant growth.** This has been seen in areas such as airflow design, e-liquid volume capacity, and increased atomiser resistance ranges. All the major hardware manufacturers in China released one or more variations of the sub-ohm tank in 2015.

(continues below)

Sample graphic



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