



The **CSRintel** Survey

of Electronic Cigarette Corporate
Responsibility Practices 2017

About the survey

The CSRIntel Survey of Electronic Cigarette Corporate Responsibility Practices 2017 was conducted in order to study user perception and preferences regarding CSR practices prevailing in the Electronic cigarette sector. The purpose of the survey was to understand how users perceive the practices prevailing within this sector as it becomes increasingly mainstream and acquires the potential of replacing traditional tobacco products.

The data collection took place between Quarter 2 and Quarter 3 of 2017. In order to capture user perceptions, our team approached potential survey respondents through social media channels such as Facebook, Twitter and Instagram, specifically identifying individuals who represented an enthusiastic sub-segment of Electronic cigarette users. We anticipate that in this manner the respondents represent user voices that comprise an important segment of consumers that not only follow the developments in this industry but also are actively engaged in its development and evolution.

Although our survey was administered worldwide without specifically targeting any particular country, USA (76%), Canada (11%) and UK (6%) were most widely represented in our respondent demographics. Other countries that comprised 7% of our sample included respondents from Finland, Australia, Germany, Norway, France, Ireland, The Netherlands, and India, among others. The survey itself was built and administered through Qualtrics. All our results are statistically significant at 95% level of confidence.



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Tanusree is the Founder of CSRIntel and has more than 10 years' experience guiding and consulting with firms across industries to provide non-financial advisory services.

Tanusree is an expert in Corporate Social Responsibility and Corporate Governance with a PhD from ESADE Business School. Tanusree is a faculty at Trinity College Dublin and lectures on CSR, Ethical Business and Governance. Her research on the subject is published in leading research journals of the world. Her opinion pieces feature in news dailies such as The Conversation.

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781 unique respondents were hand-picked for evaluating user perception and preferences regarding CSR practices prevailing in the Electronic cigarette sector.



Data collection for the survey took place over Quarter 2 and Quarter 3 of 2017.



Respondent demographics covers the USA (76%), Canada (11%), the UK (6%) and others (7%).



Academic researchers of highly reputed Universities were enlisted to design, conduct and analyze survey responses with results measured at 95% level of significance.



Part 1 of the survey assesses consumer behavioral characteristics ranging from past smoking and present vaping behaviors, and the degree and nature of consumer participation and interaction with the E-cigarette ecosystem.



Part 2 of the survey measures the brand awareness and brand preferences of Tobacco and independently owned E-cigarette brands.



Part 3 of the survey captures the degree to which consumers support regulations affecting E-cigarettes and highlights ethical practices expected by consumers.



Part 4 of the survey examines different strategies that can help companies to build brand loyalty among consumers.

Executive Summary

Part 1

User Behavioral Characteristics

- Vast majority of the survey respondents are enthusiastic users of E-cigarettes from the USA, the UK and Canada. Overall, perceptions of 781 adult respondents were included in the survey. Majority of these respondents participate in large number of industry related activities such as following social media websites, and attending vape shows and sector specific conferences.
- A substantial proportion of enthusiastic users switched to E-cigarettes from Tobacco products and have a very positive view of E-cigarettes in general.

Part 2

User Brand Awareness and Preferences

- There is a high degree of brand awareness among E-cigarette enthusiasts. A greater engagement with the E-cigarette industry through stakeholder events and social media activities increases brand awareness amongst users.
- In general, there is a negative perception of Tobacco owned E-cigarette brands. Enthusiasts show a strong preference towards independent E-cigarette brands over Tobacco owned brands.
- It is important to note that despite the largely negative perception on Tobacco owned E-cigarettes, users perceive that Tobacco companies that advocate and introduce nicotine alternative products, such as E-cigarettes, are being more socially responsible than others.

Part 3

User Perceptions on Sectoral Regulations

- The degree of support regulations on E-cigarette industry varies with the nature of the regulation. For example, while E-cigarette enthusiasts widely support warning labels on E-cigarette products, they largely disapprove of restrictions on E-cigarette advertising on mass media and restraints on E-liquid bottle sizes.
- There are certain ethical practices and standards that are highly supported by enthusiastic users. In particular, users deeply care that manufacturers and retailers of E-cigarette products abide by environmental, labour and other quality standards, even when not required by law. In contrast, local manufacturing of products and membership of an E-cigarette association are not viewed as critically important.
- Users tend to conduct background checks before purchasing e-liquid products, especially in relation to the country of origin of the products.

Part 4

Building User Brand Loyalty

- At the outset, enthusiastic users have a more positive perception of E-cigarette companies that are engaged in CSR activities. While there are a host of CSR practices that are supported by E-cigarette users, health awareness activities are viewed as most important of these.
- There is a strong association between companies engaging in CSR practices and brand loyalty among users. This is particularly true for E-cigarette companies engaged in health awareness practices.
- There are multiple sources that E-cigarette enthusiasts rely on to gather information on the E-cigarette sector. Interestingly, friends and family are the most trusted source of information in relation to the efficacy of E-cigarettes with users being skeptical of information emanating from government owned agencies.

The CSRintel survey on Electronic Cigarette Corporate Responsibility Practices 2017 has been prepared, conducted and analysed under the close supervision of experienced academic researchers towards presenting an objective view on the subject. The respondents in the survey are unique and comprise an original data set.

CSRintel provides advisory and high quality research services on CSR and non-financial aspects concerning organizations across industries and geographies.

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