

To: Interested Parties
From: McLaughlin & Associates
Re: Adult Vapor Consumer Survey in Battleground States
Date: October 25, 2019

Summary

This survey among 4,669 adult vapor consumers in battleground states clearly shows these consumers are very likely voters who are highly passionate and motivated by issues and legislation that would affect vapor products. Specifically, vapor consumers are vehemently opposed to banning flavors in all nicotine vapor products. The survey results illustrate vapor consumers are likely to become single issue voters based on a candidate's position on vapor products, particularly coming out to vote against candidates who support a flavor ban. Conversely, this passionate voting bloc would rally behind a candidate who opposes banning flavors in all nicotine vapor products. Vapor consumers are interested in eliminating vapor product usage by minors. The vast majority supports banning the sale of nicotine vapor products to anyone under the age of 21-years old. It is evident that the passion these consumers have surrounding issues affecting vapor products stems from using vapor products to quit smoking cigarettes. They are adamant about protecting their choices as an adult to use this alternative product to cigarettes, including protecting which flavors they can choose. The numbers indicate adult vapor consumers would also be opposed to limiting flavor choices.

Universal Opposition to Banning Flavors, But Support for Raising the Legal Age

- Virtually all vapor consumers in battleground states ardently oppose “banning flavors in all nicotine vapor products” (99% oppose to 1% support). The intensity of the opposition is universal (97% strongly oppose).
- By a 3 to 1 ratio (74% to 24%), three-quarters of vapor consumers support “banning the sale of nicotine vapor products to anyone under the age of 21-years old, requiring government issued identification for every sale.” The majority (51%) “strongly” supports the increased age requirement.
- Nine in ten (92% to 0%) vapor consumers believe the more effective way to reduce the illegal use of nicotine vapor products by minors is to raise the legal age to purchase any nicotine vapor products and require government issued identification for every purchase rather than banning flavors in all nicotine vapor products. (8% don't know)

Banning Flavors Turn Vapor Consumers into Single Issue Voters

- Four in five (83%) vapor consumers are likely to decide their vote based solely on a candidate's position on nicotine vapor products and issues. Half (50%) are "very" likely to be single issue voters.
- Nearly all (96%) of these vapor consumers are likely to vote in the 2020 general elections. Four in five (85%) are "definitely" voting. Among the 4% who are less likely to vote, the majority (59%) would be likely to come out to vote if lawmakers banned the sale and use nicotine vapor products.
- These vapor consumers favor the Republican candidate on the generic ballot (46% to 24%), but 30% are undecided and up for grabs in the battleground states.
- Supporting a ban on flavors in all nicotine vapor products is a political liability. Nearly all (96%) vapor consumers are LESS likely to vote for a candidate who supports a flavor ban. The intensity (92% much less likely) shows the passion they share on this issue.
- Conversely, there is political upside for candidates who oppose a ban on flavors in all nicotine vapor products. Virtually nine in ten (88%) vapor consumers are MORE likely to vote for a candidate who opposes a flavor ban. Eight in ten (79%) are "much" MORE likely to support such a candidate.
- These vapor consumers approve of the job Donald Trump is doing as President 51% to 44%; however, "if the Trump Administration bans the sale of flavors in all nicotine vapor products," three-quarters (74%) would be LESS likely to vote for him. Two-thirds (65%) would be "much" LESS likely to vote for Donald Trump. The vapor consumers in Trump's base would likely turn on him over this single issue.
 - **Approve Trump:** 65% less likely
 - **Republicans:** 65% less likely
 - **Conservatives:** 62% less likely
 - **Independent Men:** 83% less likely
 - **Independent Women:** 79% less likely

Vapor Products Have Been Essential to Quit Smoking

- Nine in ten (94%) of these vapor consumers are former cigarette smokers.
- Four in five (85%) smoked cigarettes for more than 10-years. The majority (57%) smoked for 20 or more years.

- Four in five (84%) smoked at least one pack of cigarettes a day. Half (50%) smoked more than one pack a day.
- All (100%) say vapor products have been important to quit smoking. Virtually all (99%) say vapor products have been “very” important.
- Universally, 98% to 2% believe “by over-regulating nicotine products, the government is taking away an adult consumer’s choice to use a nicotine-containing product that many consider an important alternative to cigarettes.” (94% strongly agree)
- Likewise, 96% to 3% believe “the government should not create obstacles, like nicotine vapor product taxes and restrictions, for adults who want to use an alternative to cigarettes.” (89% strongly agree)

Methodology

This survey of 4,669 adult vapor consumers in battleground states was conducted between October 17 and 22, 2019. All interviews were conducted online via an e-mail invitation distributed to over 121,000 adult vapor consumers in the states of Arizona, Colorado, Florida, Georgia, Iowa, Maine, Michigan, Minnesota, Nevada, New Hampshire, New Mexico, North Carolina, Ohio, Pennsylvania, Texas, Virginia and Wisconsin.