Retail Marketing Practices in Vape Shops: Exploratory Methods and Potential Applications for State and Community Research

Dianne C. Barker, MHS, Jidong Huang, PhD, Christine Mineart, MPH, Pratibha Nayak, PhD, Frank Chaloupka, PhD
SCTC Research Initiative Retail Workgroup
April 17, 2015
Funded by a NIDA TCORS-R03, flowing through three inter-related GSU-UIC-RTI projects under, “The science of decision-making: connecting people and policy”

Collaboration Across Several Research Teams:

- **UIC and Barker Bi-Coastal Health**: Jidong Huang (PI); Dianne Barker (Co-PI); Frank Chaloupka (Co-I); Kai-Wen Cheng (Post doctoral Fellow); Elissa Resnick (Program Manager); Megan Diaz (RA); Maryam Mirza (RA); Christine Mineart (Field Manager)
- **GSU**: Pratibha Nayak (Postdoctoral Fellow); Krishna Kota (RA)
- **University of Oklahoma Health Sciences**: Ted Wagener (Co-I); Elly Leavens (RA)
- **Mayo Clinic**: Scott Leischow (Co-I); Janet Okamoto (Co-I); Matthew Bondaryk (RA)
- Built on ongoing work conducted by Lisa Henriksen, et al. at Stanford University; and Steve Sussman, et al. at University of Southern California
Four Aims:

Aim 1: To document product availability, promotion, price and placement of various types of electronic nicotine delivery systems (ENDS) in a convenience sample of vape shops located in six cities.

Aim 2: To construct a retail store observation instrument for use in vape shops and in subsequent research proposals examining the effects of point-of-sale marketing of ENDS on youth and young adult vaping and smoking behavior.

Aim 3: To provide insights into how current and future FDA proposed regulations on ENDS might affect ENDS marketing practices in vape shops.

Aim 4: To collect pilot data in preparation for an R01 submission examining the effects of differential ENDS marketing practices on youth and young adult vaping and smoking behavior.
Status:

- Despite major administrative hurdles (UIC IRB exemption approved February; subcontract still pending; grant end date August 31, 2015):
  - UIC Vape Shop Store Observation Form & UIC Merchant Interview Discussion Guide finalized
  - Pilot in 3 Southern CA vape shops and 4 Seattle area vape shops completed as of 4/10/15
  - Vape shop enumeration process finalized
  - All sites have assigned staff for vape shops visit
  - Once all IRBs finalized and web-based training occurs, site visits will commence in Atlanta, GA; Oklahoma City, OK; Chicago, IL; Henderson, NV; Phoenix, AZ; and San Jose, CA
Today:

- Vape Shop Enumeration Process
- Themes to Date
- Implications for State and Community Research in the Retail Environment
Vape Shop Enumeration Process: Inclusion Criteria

- Vape shops are defined as retail outlets primarily engaged in the retail sale of electronic nicotine delivery devices (ENDS) and their associated products (e.g., e-cigarettes, e-cigars e-juices) to the public. At least 50% of the store’s merchandise must be ENDS-related.

- Subjects to be interviewed are vape shop owners or managers, English-speaking, 18-years and older.
Vape Shop Enumeration Process: Steps

For each city, we are conducting a web search for vape shops using the following sources:

- Google Maps
- Yelp.com
- YellowPages.com
- Provape.com
- Vaporsearch.com
- Ecigarette-forum.com
- (Store Locator)
- Vapelocate.com
- ‘Vape Maps IPhone App

Google Maps Search for “Vape Shops-Seattle, WA” 4/15/2015
Vape Shop Enumeration Process: Exclusion Criteria

- If vape shop listing indicates a location in another city;
- All additional stores if franchised;
- Stand-alone public vape lounges
- Private vape clubs/lounges
- Any public retail outlet selling <50% e-cigarette or vaping products. This eliminates:
  - Tobacco retail and medical marijuana shops
  - If unclear type of outlet:
    o Web site reviewed and if still necessary,
    o Retail outlet telephoned and is asked, “Does your retail outlet primarily sell vaping products or tobacco products?”
# Vape Shop Enumeration Process:
## Final List for Seattle Across All Web Sources

<table>
<thead>
<tr>
<th>Shop Name</th>
<th>Google Maps</th>
<th>Yelp</th>
<th>Provape.com</th>
<th>Vaporsearchusa.com</th>
<th>Yellow Pages</th>
<th>E-Cig Store Locator</th>
<th>Vape Locate</th>
<th>Vape Maps App</th>
</tr>
</thead>
<tbody>
<tr>
<td>Future Vapor</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>eCig N Vape</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>e Cig N' Vape</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vape Station at Tobacco Junction</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beyond Vape</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ecigExpress Seattle</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Greenlake Vapor</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ausum Vapor</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I-Vape Lakecity</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cloudroom Vapes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>VaporsRx</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>_eCignVape</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>West Seattle Smoke Company</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Themes To Date: Product Usage

- Vape shop owners reported 80-90% of their customers using vape products to quit smoking traditional cigarettes
- All assume e-cigarettes are a lot safer than e-cigarettes
- Only one of the seven sold traditional tobacco products (i.e., cigarillos & Shisha)
- All contemptuous of disposable cigarettes
Themes To Date: Regulation and Marketing

- Vape shop owners generally aware of vaping policies being proposed at a national and local level, mainly through Internet vape sources
  - Many supportive of listing e-juice ingredients and regulating safe production of e-juices
  - All opposed to elimination of free samples (most offer 0 nicotine) and flavors (new, interesting flavors large part of revenue stream)
  - All opposed to being regulated under tobacco laws, including tax and licensing but not necessarily opposed to these if vape-specific

- All report that they did not have to spend much time or energy marketing their products
Themes to Date: Vape Shop Marketing

- Majority of vape shops use social media outlets for marketing, and are able to promote products at no expense, and at a rapid pace
  - Instagram, Facebook, Twitter

- Few vape shops reported using print or broadcast media for marketing

- External signage limited to business hours and no minors’ access

Vforvape in Los Angeles. Instagram screen shot 4/10/2015
Themes to Date: Vape Shop Marketing

• Most stores sponsor events, classes, and booths at community events

• Many owners mentioned cross-marketing with other stores and distributors (e.g., e-juices)
Implications for State and Community Research in the Retail Environment

- How best to define a retail vape outlet: are there differences in vape shops selling medical marijuana/traditional tobacco products vs. those that do not?
  - What will the next generation look like? (e.g., liquor licenses?)

- Minors access to vape stores regulated in most states and to date, carefully monitored by vape shops
Implications for State and Community Research in the Retail Environment

- Unlike traditional retail tobacco outlets, majority are small stores. Data collection is visible/need permission & will need to interact with clerks to:
  - Ascertain product prices and promotions
  - Note flavors (75+) and brands, unless menu clearly visible

- Very little marketing, exterior and interior with exception of interior product displays

From the collection of Loomis B, et al.
STOP SMOKING
START VAPING

Electronic Cigarettes & E Liquids
Starter Kits starting at $26.00
TCORS Vape Shop Interest Group

First Conference Call:

Monday, April 27th 1-2 et

Mollie Miedzinski MIEDZIM1@WESTAT.com