



# Trends in Awareness and Usage of Nicotine Products in Wales (2014-2025)

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**ash** wales  
cymru  
action on smoking and health

    @ashwalescymru  ash.wales

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# Introduction

This report presents an analysis of trends in awareness and usage of novel nicotine products among adults in Wales.

The analysis draws on data from ASH Wales Cymru's annual public opinion poll, conducted by YouGov with a representative sample of over 1,000 adults in Wales each wave, aged 18 and over. The survey explores how products such as e-cigarettes/vapes, nicotine pouches and heated tobacco products are perceived and used across the Welsh population.

This survey is part of a wider Smokefree GB survey, commissioned by ASH (UK). ASH Wales Cymru commissions the Welsh dataset.

The report presents analysis on the younger demographics tracking trends and usage amongst 18-24-year-olds. The health and wellbeing of this demographic has profound implications for long-term public health trajectories and healthcare costs.

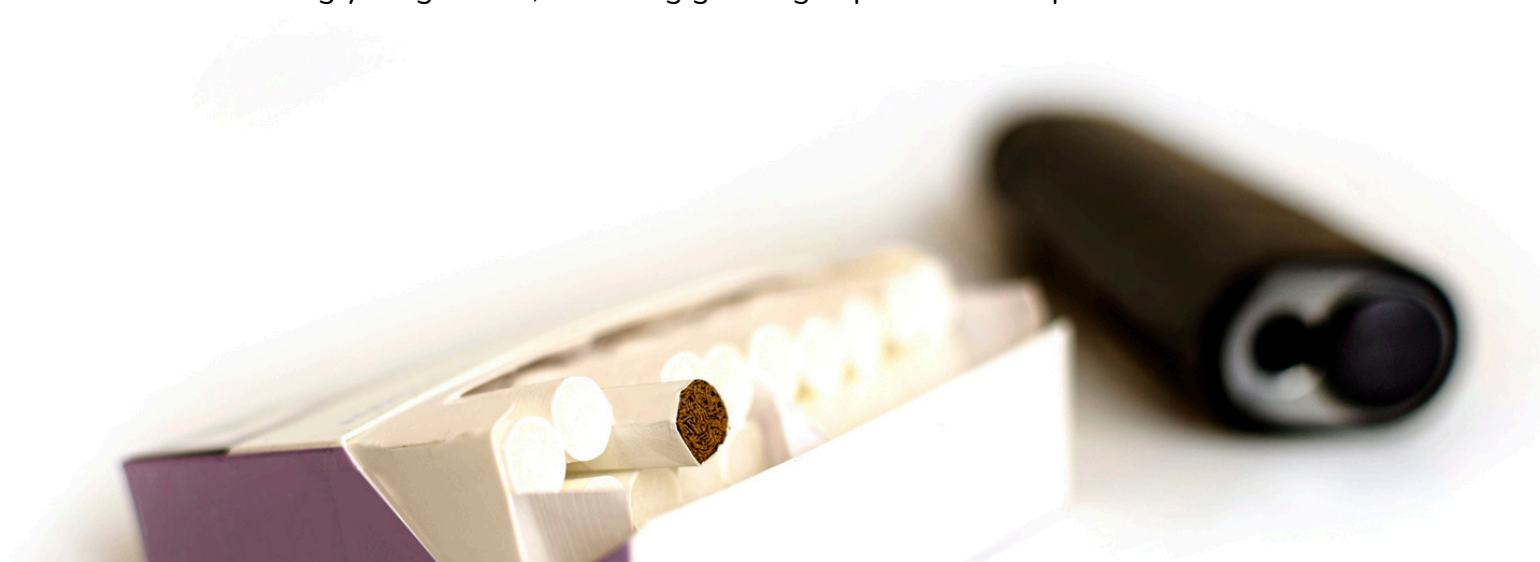
ASH Wales Cymru is recognised as the leading organisation for tobacco control in Wales. Our work brings together experts in population health, behavioural studies and smoking cessation to secure support for ambitious tobacco control plans for Wales.

## Executive Summary

Awareness and use of novel nicotine products have increased significantly in Wales between 2014 and 2025, particularly among 18–24-year-olds.

E-cigarette awareness is now near-universal, with current use among young adults rising sharply from 3% in 2014 to 16% in 2025. Nicotine pouches have also seen rapid growth, with awareness among 18–24-year-olds increasing from 47% (2020) to 79% (2025) and usage reaching 10%.

Heated tobacco products remain less commonly used, but awareness has more than doubled among young adults, reflecting growing exposure to the product.



# Summary of Analysis and Trends

## E-cigarettes / Vapes

**Awareness** among the general population has remained consistently high at over **93%** since 2014. The number of adults who have **ever vaped** has increased significantly from **15%** (2014) to **27%** (2025). **Current usage** among all adults has more than doubled from **5%** (2014) to **12%** (2025).

Among 18-24 year-olds **awareness** has increased from **88%** (2014) to **96%** (2025). The number that have **ever tried** a vape has also surged, doubling from **19%** (2019) to **44%** (2025). This indicates a strong trend of increased awareness, experimentation and usage in younger demographics.

The increase in **current usage** among 18-25 year-old has seen a sharper rise than the general population increasing from **3%** (2014) to **16%** (2025).

### E-cigarettes / Vapes – Awareness

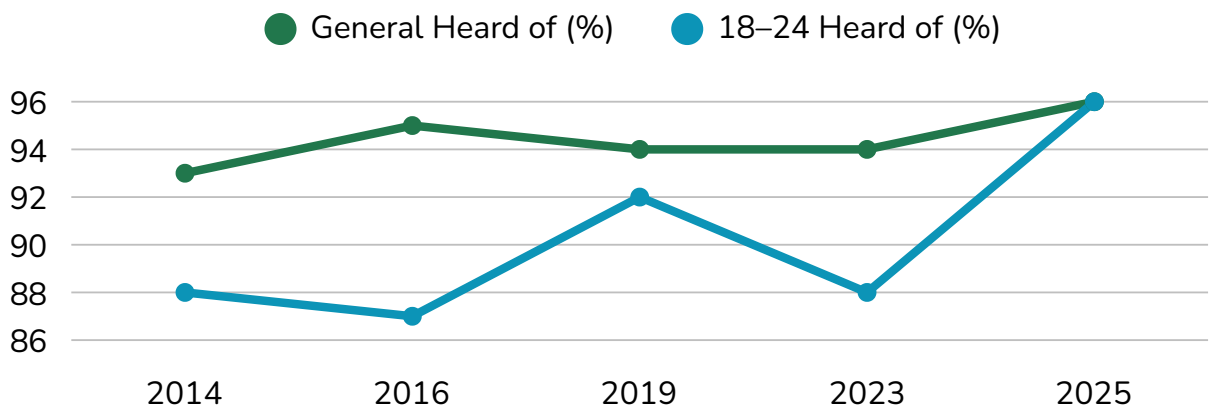
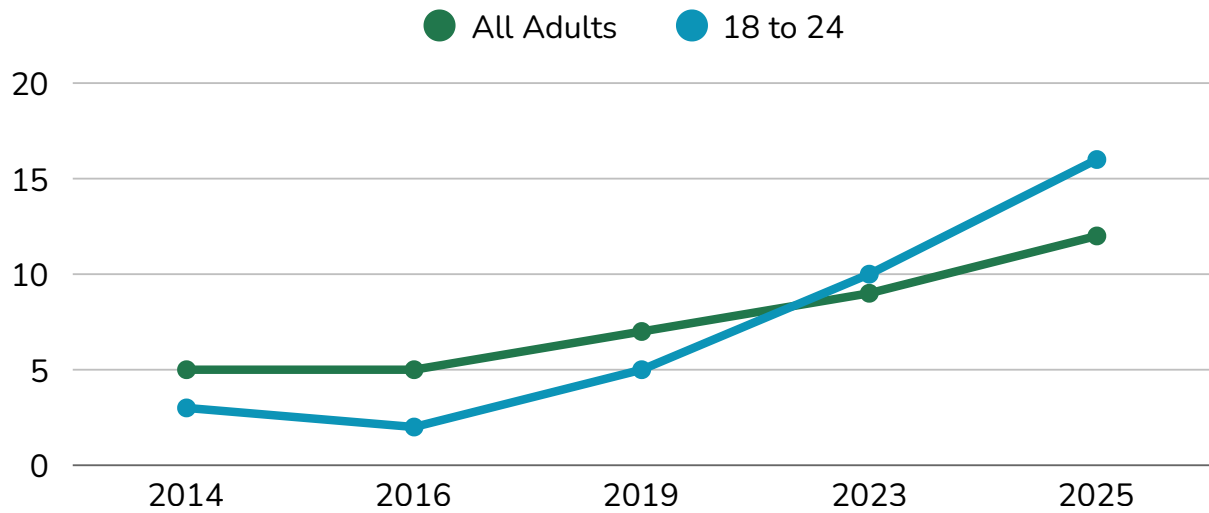


Table 1. Awareness of E-cigarettes/Vapes Among Adults in Wales (2014–2025)

Year	General Heard of (%)	18–24 Heard of (%)
2014	93	88
2016	95	87
2019	94	92
2023	94	88
2025	96	96

ASH Wales Adult Population Survey 2014, 2016, 2019, 2023 and 2025. Unweighted base:  
All adults (2014=1093; 2016=1048; 2019=1046; 2023= 1117; 2025= 1098)  
All 18-24 year olds (2014= 43; 2016= 117; 2019 =157; 2023 = 200; 2025 =214)

## E-cigarette/ Vaping Current Usage



**Table 2. E-cigarette/ Vaping Current Usage (2014–2025)**

Percentage of respondents who reported trying e-cigarettes/vapes and still use them, by year and age group.

Year	All Adults	18 to 24
2014	5%	3%
2016	5%	2%
2019	7%	5%
2023	9%	10%
2025	12%	16%





# Nicotine Pouches

Awareness among the general population rose from **32%** in 2020 to **52%** in 2025, while usage increased from **2%** to **6%**. The 18–24 group showed a dramatic rise in both awareness (**47%** to **79%**) and usage (**2%** to **10%**).

The data indicates nicotine pouches are rapidly gaining traction, particularly among young people, reflecting emerging trends or targeted marketing.

## Nicotine Pouches – Awareness

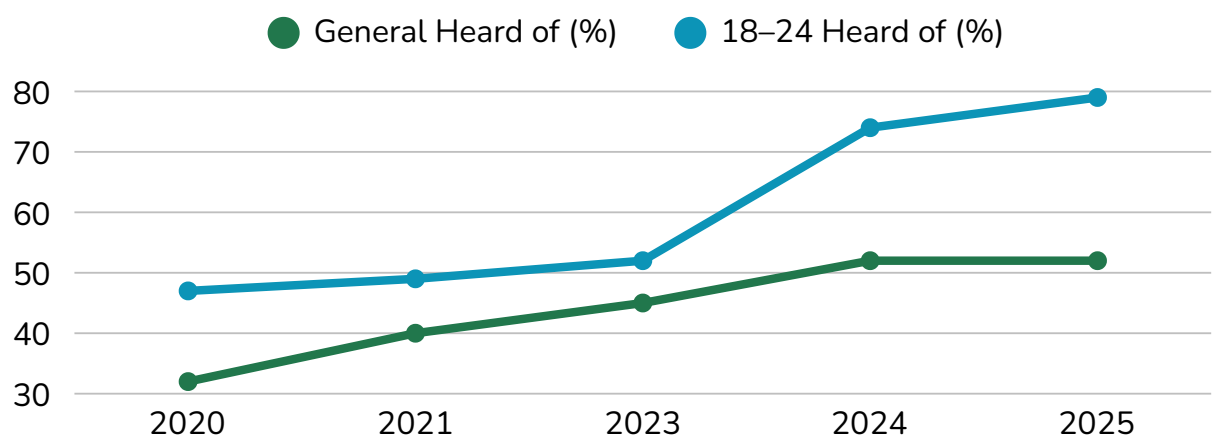


Table 3. Awareness of Nicotine Pouches Among Adults in Wales (2020–2025)

Year	General Heard of (%)	18–24 Heard of (%)
2020	32	47
2021	40	49
2023	45	52
2024	52	74
2025	52	79

ASH Wales Adult Population Survey 2020, 2021,2023, 2024 and 2025. Unweighted base:  
All adults (2020=1034; 2021=1015; 2023=1117; 2024= 1122; 2025=1098)  
All 18-24 year olds (2020=106; 2021=97; 2023=200; 2024=211; 2025=214)

Nicotine Pouches – Ever Tried

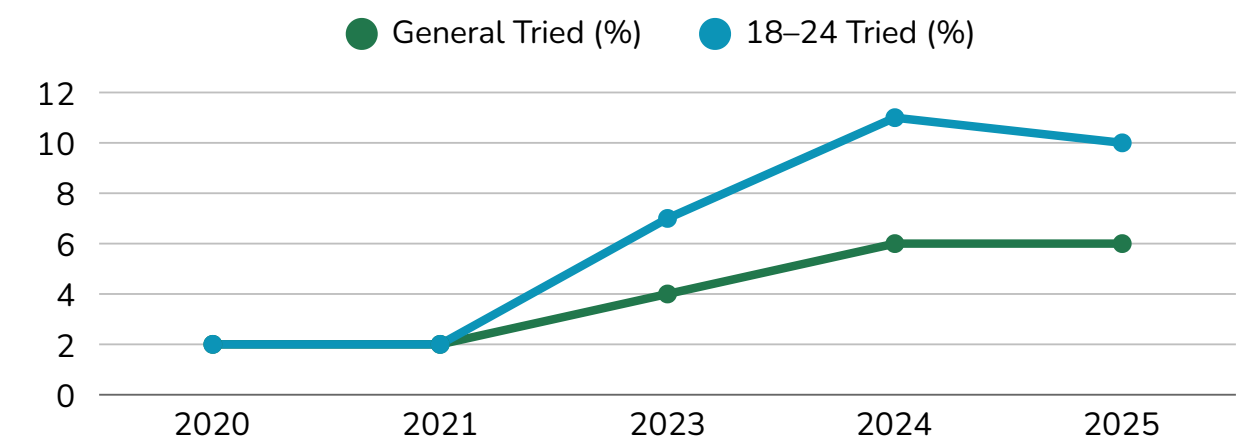


Table 4. Ever Tried Nicotine Pouches Among Adults in Wales (2020–2025)

Year		General Tried (%)	18-24 Tried (%)
2020		2	2
2021		2	2
2023		4	7
2024		6	11
2025		6	10

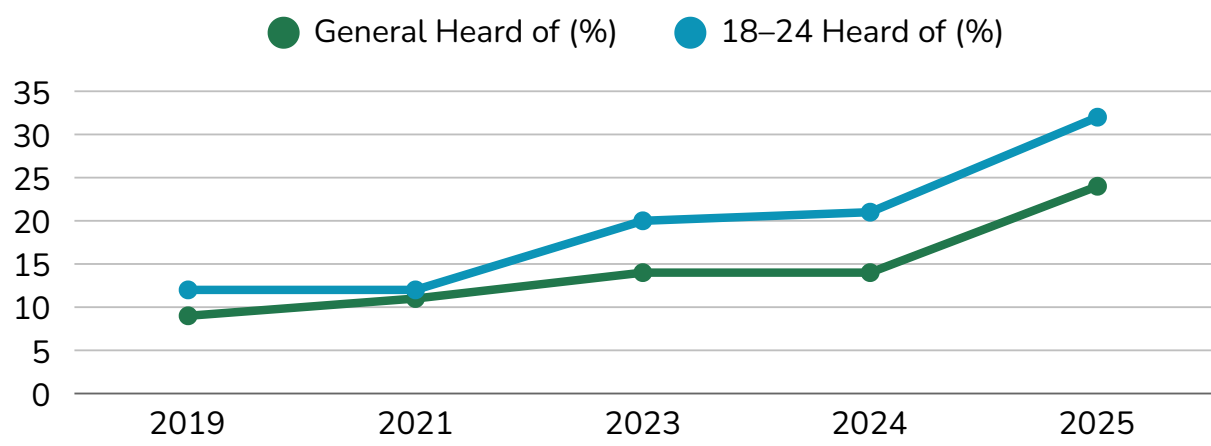


# Heated Tobacco Products

Awareness increased from **9%** in 2019 to **24%** in 2025, usage has remained stagnant at 1–2%. The 18–24 age group has seen awareness grow from **12%** to **32%**.

These are relatively new products and although the number that have ever tried is limited there has been a marked increase in awareness.

## Heated Tobacco Products – Awareness



**Table 5. Awareness of Heated Tobacco Products in Wales (2019–2025)**

Year	General Heard (%)	18–24 Heard (%)
2020	9	12
2021	11	12
2023	14	20
2024	14	21
2025	24	32

ASH Wales Adult Population Survey 2019, 2021,2023, 2024 and 2025. Unweighted base:  
All adults (2019=1046; 2021=1015; 2023=1117; 2024=1122; 2025=1098)  
All 18-24 year olds(2019=157; 2021=97; 2023=200; 2024= 211; 2025=214)



Heated Tobacco Products – Ever Tried

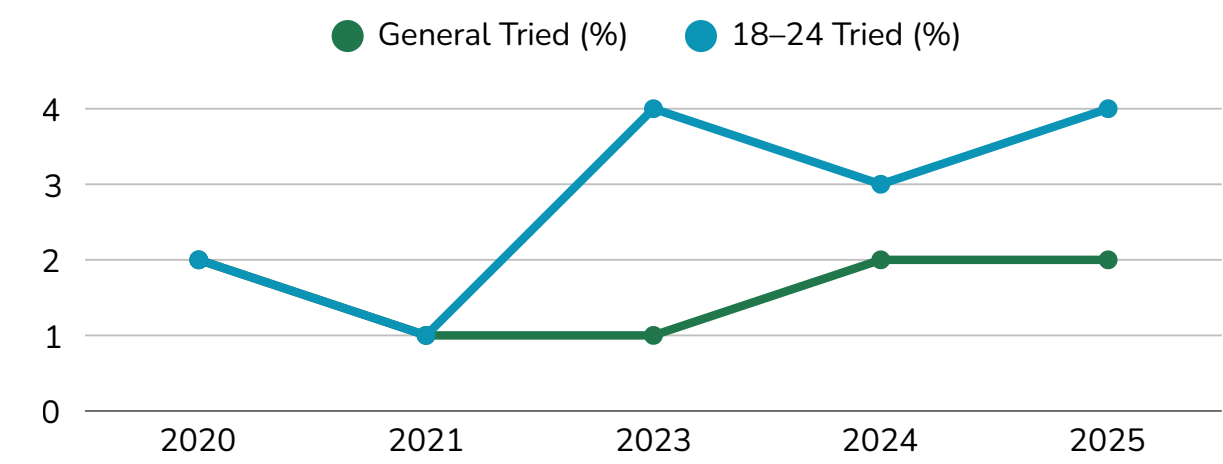


Table 6. Ever Tried Heated Tobacco Products in Wales (2019–2025)

Year	General Tried (%)	18-24 Tried (%)
2020	2	2
2021	1	1
2023	1	4
2024	2	3
2025	2	4





## Conclusion

The analysis of awareness and usage trends from 2014 to 2025 highlights significant shifts in public familiarity and experimentation with novel nicotine products in Wales.

E-cigarettes/vapes remain the most widely recognised and used product particularly among younger adults.

Nicotine pouches have emerged as a rapidly growing product in terms of both awareness and usage, especially within the 18–24 age group.

Heated tobacco products show a significant increase in visibility, at the present time uptake is limited.

These patterns underscore the evolving landscape of nicotine consumption and the importance of targeted monitoring usage to inform public health responses.

