



RESEARCH

INFORMATION

Exploring the retail availability, sales, display, and marketing of new nicotine products in Scotland (NIPS Study)



AIMS

The UK nicotine market has rapidly evolved with the emergence of different types and brands of new nicotine products (NNPs) such as vaping products, nicotine pouches and heated tobacco. This has led to concern about their availability, marketing and use among young people. The NIPS study aimed to:

- Examine and measure the retail availability, sales, display, and marketing of NNPs in Scotland
- Explore the retail environment of NNPs from the perspectives of young people, school teaching staff, and retailers



KEY FINDINGS

- Between 2020 and 2024, there was a gradual increase in the total number of registered NNPs outlets across Scotland, with greater NNP availability in more disadvantaged neighbourhoods.
- Across Scotland, sales of NNPs in convenience stores increased sharply between 2019 and 2024. There was a rapid increase in sales between 2021 and 2023 (coinciding with the emergence of disposable vapes on the market) followed by a small decrease in 2024.
- Retailers highlighted the importance of where and how NNPs are positioned, promoted and displayed around the interior and exterior of the store for attracting consumer attention and sales.
- Vapes were the most widely marketed NNP in the retail environment. Stores in more disadvantaged neighbourhoods were more likely to have larger vape displays at the point-of-sale and more visible external marketing. Despite being a newer product, nicotine pouches were present at the point-of-sale in 88% of stores.





- Young people reported ease of access to NNPs and high awareness of NNP marketing at the point-of-sale, in shop windows and outside the shop. NNP displays were described as colourful and attractive and were believed to encourage young people to try products.
- The use of NNPs, especially vapes, has had a major impact on schools, with pupils experiencing adverse health reactions and missing classes to vape, and teachers having to confiscate NNPs, exclude pupils from school, and monitor toilet areas.



WHAT DID THE STUDY INVOLVE?

Work Package 1: Examination of retailers and sales of NNPs across Scotland

First, we extracted and geocoded data from the Register of Tobacco and Nicotine Vapour Product Retailers to examine changes in NNPs availability. We examined the types of retailers selling NNPs including specialist vape stores, supermarkets, small grocery/convenience stores, confectioners/tobacconists/newsagents, petrol station forecourt stores, off-licences, fast-food/takeaway outlets and other retailers such as mobile phone repair shops and discount stores.

Second, we obtained sales data (i.e. each item scanned at the till) on all NNPs from around 300 convenience stores across Scotland from 2017 to 2024. The focus was convenience stores because this is where young people most commonly purchase NNPs, despite it being illegal to sell vapes to anyone under the age of 18. We extracted data from 36 weeks, selected to represent sales across the four quarters of all study years, avoiding school holidays. We tracked changes in the number of transactions involving different NNPs in each store per week to provide national-level time trends, also examining variations by regions of the country, deprivation and urbanicity.

Work Package 2: Advertising and marketing audit of retail marketing practices

To explore retail marketing practices, this work package involved three parts. First, we looked at the content of retail trade magazines from January 2023 to April 2025 to examine NNPs display, promotion and market developments. Second, we conducted interviews with 17 retailers across Scotland selling NNPs in May and June 2025 to better understand how retailers promote and display NNPs. Third, we conducted discreet observations in 75 stores selling NNPs in October and November 2025. The observations took place in four study community areas in a range of shops selling NNPs including supermarkets, grocery/convenience stores, confectioners/tobacconists/newsagents, specialist vape shops, petrol station forecourt stores, off-licences, and fast-food/takeaway outlets. The four study communities were school catchment areas chosen to reflect different urban/rural status (urban vs. small town) and deprivation (high vs. medium/low).

Work Package 3: Discussions with secondary school pupils and teaching staff

We conducted qualitative research in a secondary school in each of the four study community areas. In each school, focus minigroups were conducted with a male and female group in Secondary 3 (14-15 years) and Secondary 4 (15-16 years) (N=4 per school, N=16 in total). The group discussions addressed pupils' awareness of NNPs, access to NNPs, NNP use, and views of their marketing and availability. Interviews were also carried out with school staff, members of the senior team or with a



guidance role (n=13 in total), to find out their views of NNP use among pupils, any impact on the school, NNP marketing and ways of reducing negative impacts of NNP use among young people.

Public Involvement: Young people and retailers were consulted for their perspectives prior to fieldwork. Their insights helped us to develop the interview guides, and the retail observation tool.



WHAT WERE THE RESULTS AND WHAT DO THEY MEAN?

The availability and sales of NNPs in Scotland have increased

At the national level, the number and density of registered outlets selling NNPs in Scotland have increased gradually from 5573 in 2020 to 7069 in 2024 (see Figure 1). The findings also show clear and consistent differences in neighbourhood-level retail density, with greater retailer provision in the most deprived (see Figure 2) and large urban neighbourhoods.

Figure 1: Number of outlets selling NNPs in Scotland 2020-2024

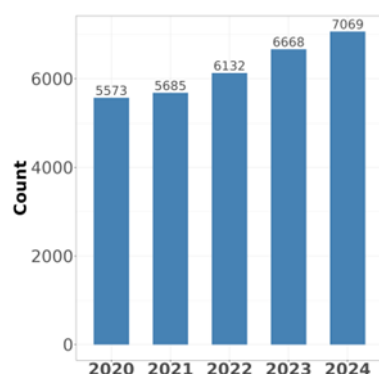
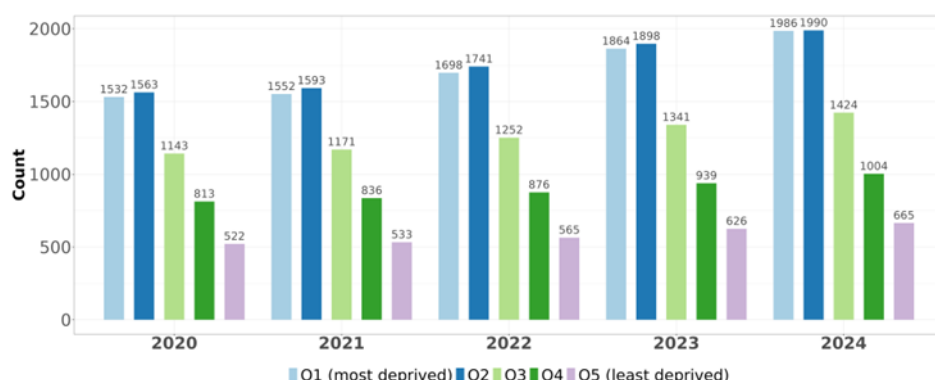


Figure 2: Retail density by neighbourhood deprivation level



Sales of vape products in a sample of convenience stores across Scotland (n=158) increased sharply between 2019 (7,978 units) and 2024 (98,555 units), with a particularly rapid increase in sales between 2021 (21,417 units) and 2023 (124,396 units), followed by a small decrease in 2024. These trends were consistent across neighbourhoods stratified by neighbourhood deprivation with no significant differences between deprivation categories. Comparison with sales in convenience stores in England and Wales showed a consistent trend over time but with overall NNP product sales greater in retailers in Scotland than the other two countries

The retail display and advertising of NNPs are key tools used to attract consumers

The emergence of NNPs on the market, particularly disposable vapes, which coincided with post-Covid lockdowns in 2021, presented a 'lifeline' for retailers who reported that their businesses were struggling. Retailer marketing strategies included bespoke gantry displays, counter-top display units, lighting and colour to make products stand out, and advertising materials placed inside the store and in shop windows. Retailers reported that this increased sales and impulse purchasing. The most prominently advertised NNP brands were owned by tobacco companies, with materials provided and placed in store by industry representatives. Posters and stickers were a prominent form of NNP advertising and vapes were the most widely marketed NNP. Despite their recent emergence on the market, nicotine pouches were present at the point-of-sale in 88% of stores. Stores in more disadvantaged neighbourhoods were more likely to have larger vape displays at the point-of-sale and more visible external marketing than stores in more advantaged neighbourhoods.





Views of young people and school staff

Pupils reported several ways in which they accessed NNPs. The most common way of accessing NNPs was through other pupils and peers within schools, particularly via Snapchat or Instagram. However, pupils also purchased NNPs themselves in shops, through proxy purchasing and online. Pupils and staff were very knowledgeable about the marketing of NNPs in shops, particularly at the point-of-sale and in shop windows, as well as the use of signs outside shops. The consensus was that these colourful and attractive displays were aimed at children and young people and were successful in terms of encouraging young people to try these products. Other sources of NNP marketing that were raised by participants included online marketing, posters at bus stops, special promotions, stalls and free samples (particularly for nicotine pouches) and social media sites featuring vapes and vaping tricks. Reported use of vapes and experimental uses of vapes was high.

How the results add to the field: This novel study brings together NNP availability and sales data, retail promotion and display practices, and young people, school staff and retailer perspectives. It provides the first comprehensive picture within the UK of changes to NNP availability and sales, the importance of NNPs and their promotion to retailers, and the impact of NNPs on schools.



WHAT IMPACT COULD THE FINDINGS HAVE?

This study provides urgently needed, high-quality evidence on the availability, sales, display, and marketing of NNPs (vapes, nicotine pouches and heated tobacco) in retailers in Scotland, including key insight from young people, school teaching staff and retailers.

- **Policy:** The findings will inform the Tobacco and Vapes Act which gives Scottish Ministers powers to regulate the retail sales and display of NNPs. There are no rules on where or how products can be displayed in the retail setting. As the details of future rules will need consultation, our findings will feed into decisions on where products can be placed in-store, whether displays should be restricted, and if conditions should be placed on where products can be sold.
- **Practice:** The findings emphasise that school staff should be equipped with knowledge and training in relation to NNPs including the risks of vaping and nicotine use.
- **Public:** Future restrictions on the availability, marketing and display of NNPs are required to reduce the appeal and use of NNPs among young people. However, the development of future restrictions should allow for the needs of adult smokers, who may vape to stop smoking.



Image taken during fieldwork: an example of a large, colourful back wall display of vapes and nicotine pouches, with lighting



HOW WILL THE OUTCOMES BE DISSEMINATED?

Project findings are being disseminated through various activities:

- **Scientific publications:** Two papers have been published highlighting pupil and school staff perspectives in the journals *Addiction* <https://doi.org/10.1111/add.70214> and *BMJ Open* <https://doi.org/10.1136/bmjopen-2025-115484>. A paper on the retail availability of NNPs has been published in *Preventive Medicine Reports* <https://doi.org/10.1016/j.pmedr.2026.103611>. Further papers are in preparation on NNP sales and retail marketing practices.
- **Conferences and talks:** We have presented findings at the 2026 Prevention Research and Society for Research on Nicotine and Tobacco Europe conferences. Other invited talks have included presentations to Scottish Government, Public Health Wales, ASH Scotland and Fast Forward - a national youthwork organisation.
- **Media and podcasts:** Our research team and findings have been quoted in media articles, interviewed for the Observer Sensemaker podcast on nicotine pouches (Nov 25), and filmed for BBC content on the retail availability of vapes (April 26).
- **Stakeholder and policy engagement:** We are due to present findings at Scottish Government meetings and at a stakeholder and policy engagement event in Westminster, London (Nov 26).

Next study: The research team is planning a follow-up study to evaluate the impact of future restrictions on the retail display and marketing of NNPs. We are currently consulting with young people and other stakeholders to hear their perspectives on this future study.



CONCLUSION

The retail marketing and display of NNPs successfully attracts consumer attention and sales. The salience and appeal of NNP marketing to young people and their perception that it is targeted at them is a cause for concern. Greater NNP availability and marketing in outlets in more disadvantaged neighbourhoods raises further concerns over continuing socioeconomic inequalities. This study provides support for restricting NNP marketing and displays.



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