VAPING FLAVOR BANS - ESTONIA

April 2022
METHOD

Quantitative Research
CAWI (computer assisted web interview) data collection
Respondents collected from online panels
Respondents were compensated for their participation, ensuring proper motivation level
Respondents were not aware what would be subject of research going in

SAMPLE

N=300 adults
Nationally representative on base of gender
Current vapers - defined as person that uses e-vaping device at least once a month: N =207
Ex-vapers: Person that used e-vaping but has stopped in meantime: N = 93

FIELDWORK

08.04. – 13.04. 2022.
Logic and data quality control done on 100% of sample
KEY FINDINGS

• Flavors other than Tobacco and Menthol were banned in Estonia in 2020.

• In spite of the ban, almost 60% of Estonian vapers still use flavors other than Tobacco and Menthol.

• The banned flavors come from Estonian vapers mixing their own liquids or from the black market.
  • This could potentially lead to a crisis similar to EVALI in the USA.

• Only 10% of Estonian vapers support the flavor ban.

• Almost everyone would support alternative ways of preventing underaged access, including stricter enforcement, education campaigns, and restricting some flavors to adult-only retail channels.
REASONS FOR VAPING

In addition to satisfaction and practical considerations such as less smell, most Estonian vapers vape to reduce and quit smoking, even though Estonia does not endorse vaping.

Main reason for vaping – Total

- Practical consideration, e.g. less smell: 35%
- Satisfaction: 31%
- To reduce smoking: 29%
- Vaping is less harmful than smoking: 27%
- To stop smoking: 20%
- Other: 5%

Data in %
WHAT HAPPENED AFTER THE FLAVOR BAN

In 2020, Estonia banned all flavors other than Tobacco and Menthol. Today, in 2022, almost 60% of Estonian vapers continue to use Fruit and Sweet flavors.
WHAT HAPPENED AFTER THE FLAVOR BAN

As a consequence of the ban, almost 60% of Estonian vapers started mixing their own liquids or turned to the black market, which has developed since.

Data in %

How do you get them? (N=120)

- I mix my own flavors: 42%
- I can still find sellers offering vaping flavors locally: 42%
- Online: 25%
- Across the border: 18%
- Other: 3%

Ipsos Consumer Survey, April 2022

N=207; What vaping flavor do you normally use?; You mentioned that you use fruit or other flavors – how do you get them?
SUPPORT FOR ALTERNATIVES TO FLAVOR BANS

86% of Estonian vapers support alternative ways of preventing underaged access, including stricter enforcement, education campaigns, and restricting some flavors to adult-only retail channels.

Stricter enforcement of underage access prevention: 54%
Ongoing and comprehensive education campaigns against underage vaping: 46%
Restrict sales of some flavors to adult only venues or channels: 40%
None of the listed: 14%

Data in %