VAPING FLAVOR BANS - NETHERLANDS

April 2022
METHODOLOGY & SAMPLE

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=301 adults
Nationally representative on base of gender
Current vapers - defined as person that uses e-vaping device at least once a month

FIELDWORK

Logic and data quality control done on 100% of sample
KEY FINDINGS

• Dutch vapers have indicated that they vape to reduce and quit smoking. Almost 40% vape because vaping is less harmful than smoking.

• 80% find flavors to be important in their decision to vape.

• Almost 60% vape flavors other than Tobacco. Fruit and Mint/Menthol flavors are key for Dutch vapers to switch and stay away from smoking, while 1/3 said Tobacco flavor was helpful.

• Flavor bans could push over 50% back to smoking, to the black market or mix their own liquids.
  • This could potentially lead to a crisis similar to EVALI in the USA.
  • Vaping flavor bans will also likely deter current smokers from switching to this less risky alternative.

• 82% of Dutch vapers support alternative ways of preventing underaged access, including stricter enforcement, education campaigns, and restricting some flavors to adult-only retail channels.
Dutch vapers have indicated that they vape to reduce and quit smoking. Almost 40% vape because vaping is less harmful than smoking. Almost 60% vape flavors other than Tobacco.

Main reason for vaping – Total

- To reduce smoking: 40%
- Vaping is less harmful than smoking: 39%
- To stop smoking: 26%
- Satisfaction: 23%
- Practical consideration, e.g. less smell: 20%
- Other: 2%

Usage of flavor – Total

- Tobacco: 43%
- Mint / Menthol: 40%
- Fruit: 42%
- Sweet, dessert: 24%
- Other: 1%
IMPORTANCE OF FLAVORS

80% of Dutch vapers consider flavors to be important when it comes to their decision to vape.

Data in %

- Not important at all: 4%
- Not that important: 15%
- Important: 40%
- Very important: 40%
- Do not know: 1%
SWITCHING AND STAYING AWAY FROM SMOKING

Fruit and Mint/Menthol flavors are key for Dutch vapers to switch and stay away from smoking, while 1/3 said Tobacco flavor was helpful.

Data in %

What flavor helps switching from smoking to vaping

- Tobacco: 33%
- Fruit: 30%
- Mint / Menthol: 24%
- Sweet, dessert: 13%
- Other: 1%

What flavor helps staying away from smoking

- Tobacco: 31%
- Mint / Menthol: 29%
- Fruit: 22%
- Sweet, dessert: 17%
- Other: 1%

Ipsos Consumer Survey, April 2022
N=301; What flavor helps switching from smoking to vaping?; In your view, what flavor helps staying away from smoking?
OPINION ON GOVERNMENT BANNING FLAVORS

Less than 10% of Dutch vapers would support a flavor ban.

Data in %

I strongly oppose the ban
I somewhat oppose the ban
Neither
I somewhat support the ban
I strongly support the ban

34 31 26 6 3
Ipsos Consumer Survey, April 2022

N=301; If such ban came to be and vaping flavors were banned, what would you do? How would you expect to get them?

**WHAT WOULD HAPPEN IF FLAVORS WERE BANNED**

Flavor bans could push over 50% of Dutch vapers back to smoking, to the black market or mix their own liquids.

- **Smoke cigarettes instead**: 29%
- **Continue vaping without flavors**: 28%
- **Find another way to get my flavors**: 23%
- **Stop using nicotine products (vaping and tobacco products)**: 20%

How would you get them? (N=69)

- Across the border: 63%
- Online: 61%
- I believe flavors will be available in the black market anyway: 30%
- I will mix my own flavors: 21%
Ipsos Consumer Survey, April 2022

N=207; What vaping flavor do you normally use; You mentioned that you use fruit or other flavours – how do you get them?

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**THE CASE OF ESTONIA – FLAVOR BAN IN PLACE**

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.

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<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tobacco, Mint / Menthol flavors</td>
<td>42%</td>
</tr>
<tr>
<td>Fruit, Sweet, dessert flavors</td>
<td>58%</td>
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THE CASE OF ESTONIA – FLAVOR BAN IN PLACE

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 %

- Tobacco: 18%
- Mint / Menthol: 45%
- Fruit: 47%
- Sweet, dessert: 28%

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 flavours – how do you get them?
SUPPORT FOR ALTERNATIVES TO FLAVOR BANS

82% of Dutch vapers support alternative ways of preventing underaged access, including stricter enforcement, education campaigns, and restricting some flavors to adult-only retail channels.

Data in %

- Ongoing and comprehensive education campaigns against underage vaping: 45%
- Stricter enforcement of underage access prevention: 37%
- Restrict sales of some flavors to adult only venues or channels: 26%
- None of the listed: 18%
THANK YOU