VAPING FLAVOR BANS - BELGIUM

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

• Most Belgian vapers have indicated that they vape to reduce and quit smoking.

• Almost 90% find flavors to be important in their decision to vape.

• 3/4 use flavors other than Tobacco. Fruit flavors are most strongly associated with switching and staying away from smoking.

• Flavor bans could push nearly 60% back to smoking, to the black market or to 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.

• 87% of Belgian vapers support alternative ways of preventing underaged access, including stricter enforcement, education campaigns, and restricting some flavors to adult-only retail channels.
Belgian vapers have indicated that they vape to reduce and quit smoking. Approximately 1/3 vape because vaping is less harmful than smoking. 3/4 vape flavors other than Tobacco.

**Main reason for vaping – Total**

- To reduce smoking: 46%
- Vaping is less harmful than smoking: 29%
- To stop smoking: 28%
- Satisfaction: 27%
- Practical consideration, e.g. less smell: 16%

**Usage of flavor – Total**

- Tobacco: 28%
- Mint / Menthol: 37%
- Fruit: 56%
- Sweet, dessert: 26%
- Other: 1%

Data in %
IMPORTANCE OF FLAVORS

Almost 90% of Belgian vapers consider flavors to be important when it comes to their decision to vape.
SWITCHING AND STAYING AWAY FROM SMOKING

Fruit flavors are key for Belgian vapers to switch and stay away from smoking. Mint/Menthol flavors are also strongly associated with staying away from smoking.

<table>
<thead>
<tr>
<th>Flavor Type</th>
<th>Switching</th>
<th>Staying Away</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fruit</td>
<td>42%</td>
<td>32%</td>
</tr>
<tr>
<td>Mint/Menthol</td>
<td>24%</td>
<td>30%</td>
</tr>
<tr>
<td>Tobacco</td>
<td>24%</td>
<td>21%</td>
</tr>
<tr>
<td>Sweet, dessert</td>
<td>10%</td>
<td>16%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Data in %

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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 Belgian vapers would support a flavor ban.

Data in %

- I strongly oppose the ban: 40%
- I somewhat oppose the ban: 29%
- Neither: 23%
- I somewhat support the ban: 5%
- I strongly support the ban: 3%

Ipsos Consumer Survey, April 2022
N=301; Your government might ban the use of vaping flavors other than tobacco. How do you feel about the proposed ban?
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 nearly 60% back to smoking, to the black market or to mix their own liquids.

- **Find another way to get my flavors**
  - 28%

- **Smoke cigarettes instead**
  - 27%

- **Continue vaping without flavors**
  - 27%

- **Stop using nicotine products (vaping and tobacco products)**
  - 17%

**How would you get them?**

- **Online**
  - 75%

- **Across the border**
  - 41%

- **I believe flavors will be available in the black market anyway**
  - 18%

- **I will mix my own flavors**
  - 15%
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.

Data in %

- Tobacco, Mint / Menthol flavors: 42%
- Fruit, Sweet, dessert flavors: 58%
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.

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?

Data in %

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

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%
87% of Belgian vapers support alternative ways of preventing underaged access, including stricter enforcement, education campaigns, and restricting some flavors to adult-only retail channels.
THANK YOU