THOLOS
FOUNDATION

GERMANY

VAPING FLAVOR BAN

2023

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

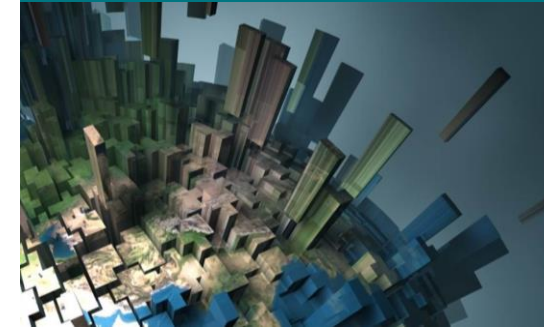**Respondents were not aware what would be subject of research going in**

SAMPLE

N=402 adults

Nationally representative on base of gender

Current vapers - defined as person that uses e-vaping device at least once a month
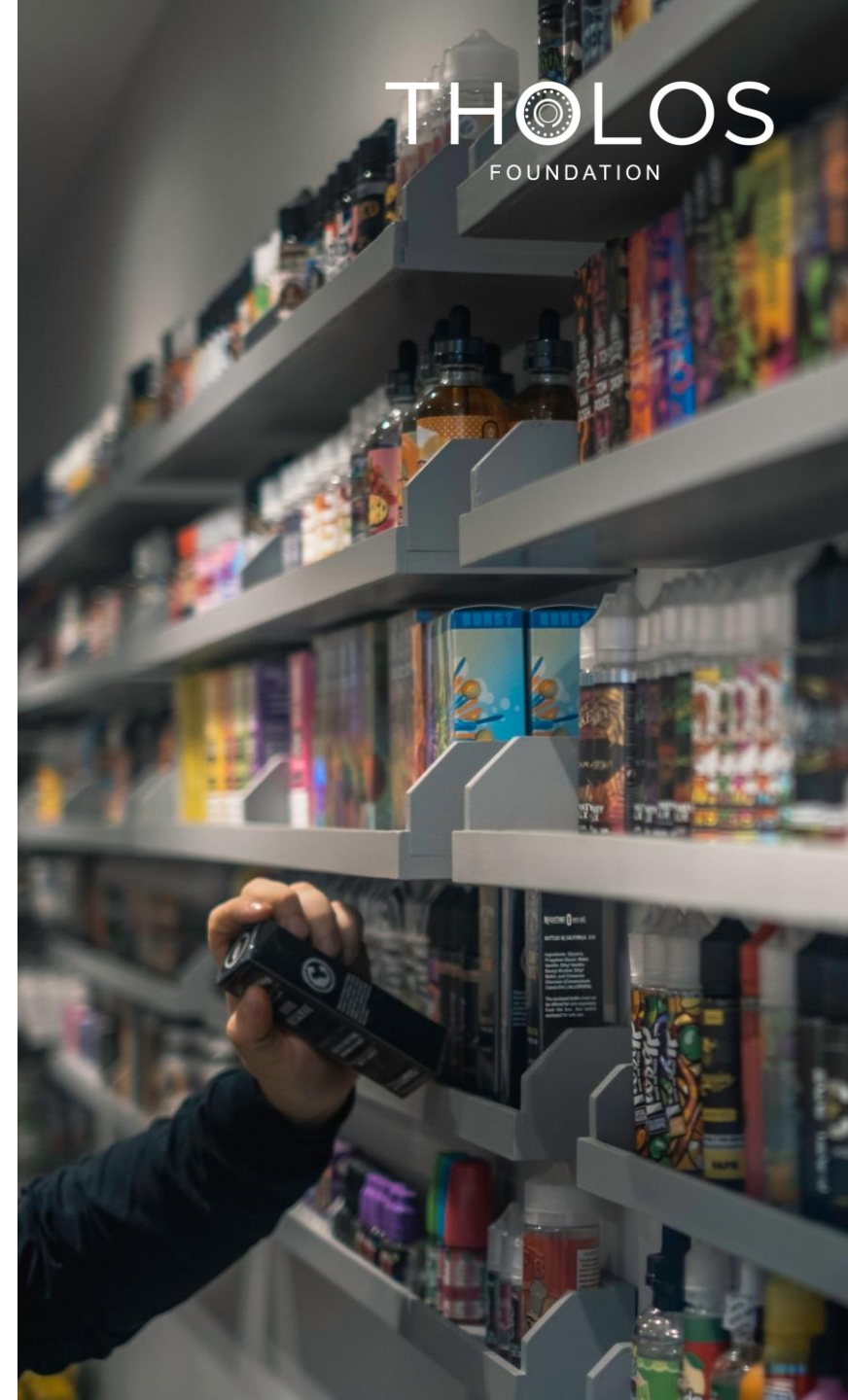
FIELDWORK

20.09. – 26.09. 2023.

Logic and data quality control done on 100% of sample

KEY FINDINGS

- Almost **80% of German vapers vape due to health-related reasons**, including to reduce or stop smoking. **Over 60% vape flavors other than Tobacco, with the most common being Fruit.**

- **Mint / Menthol, Tobacco, and Fruit flavors are the most important for enabling the switch to vaping.** But removing any category of flavors could negatively impact the ability to stay away from smoking.

- **83% of German vapers say flavors are important or very important in their decision to vape. Therefore, only 8% would support a flavor ban.**

- A flavor ban could push more than half of German vapers back to smoking, to the black market or to mix their own liquids.

Ipsos Consumer Survey, September 2023

KEY FINDINGS

- **86% of German vapers think a flavor ban could push vapers back to smoking.**

- **Almost 80% of German vapers believe the government should support less harmful alternatives to smoking.**

- **Over 85% of German vapers support alternative ways of preventing underaged access**, primarily through education campaigns.
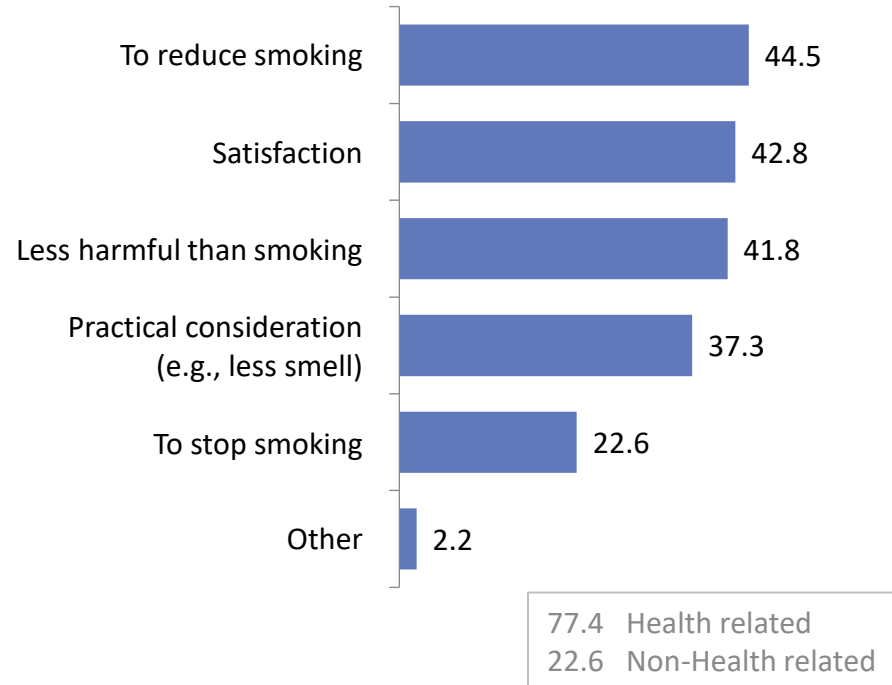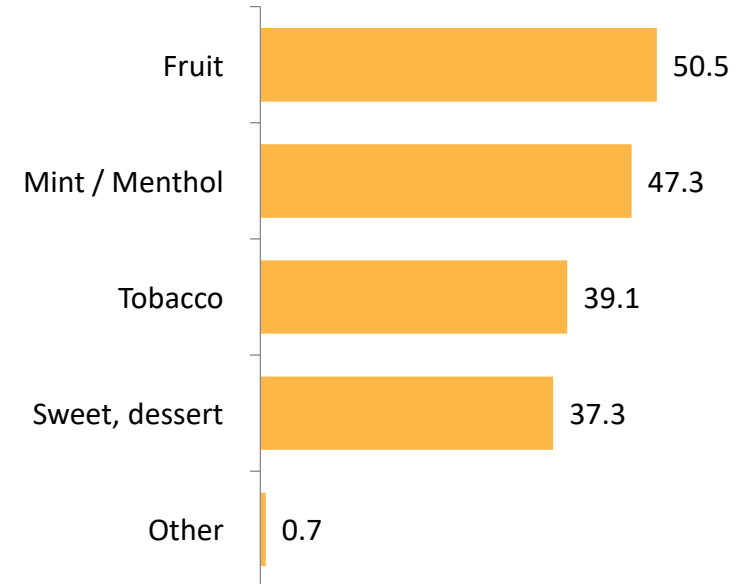
Reasons for vaping and flavors used

Almost 80% of German vapers vape due to health-related reasons, including to reduce or stop smoking. Over 60% vape flavors other than Tobacco, with the most common being Fruit.

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Data in %

Main reasons for vaping

Reason	Value
To reduce smoking	44.5
Satisfaction	42.8
Less harmful than smoking	41.8
Practical consideration (e.g., less smell)	37.3
To stop smoking	22.6
Other	2.2

77.4 Health related
22.6 Non-Health related

Use of flavors

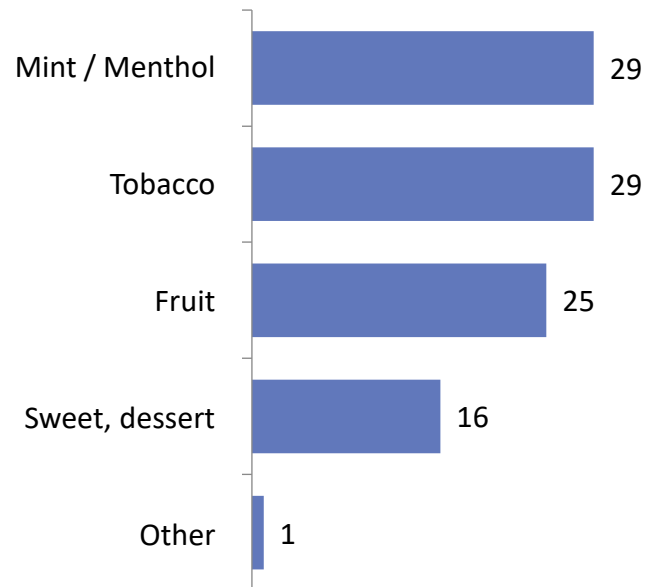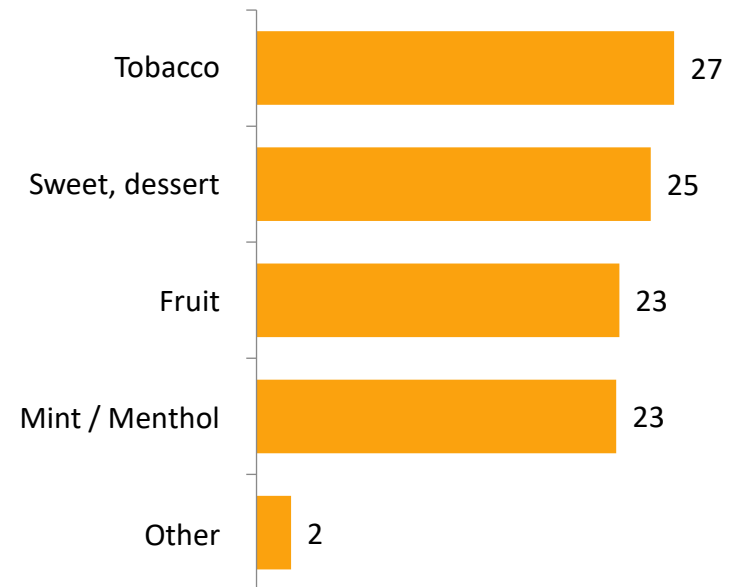| Flavor	Value
Fruit	50.5
Mint / Menthol	47.3
Tobacco	39.1
Sweet, dessert	37.3
Other	0.7

Switching and staying away from smoking

Mint / Menthol, Tobacco, and Fruit flavors are the most important for enabling the switch to vaping.
But removing any category of flavors could negatively impact the ability to stay away from smoking.

Data in %

Switching from smoking to vaping

Flavor	%
Mint / Menthol	29
Tobacco	29
Fruit	25
Sweet, dessert	16
Other	1

Staying away from smoking

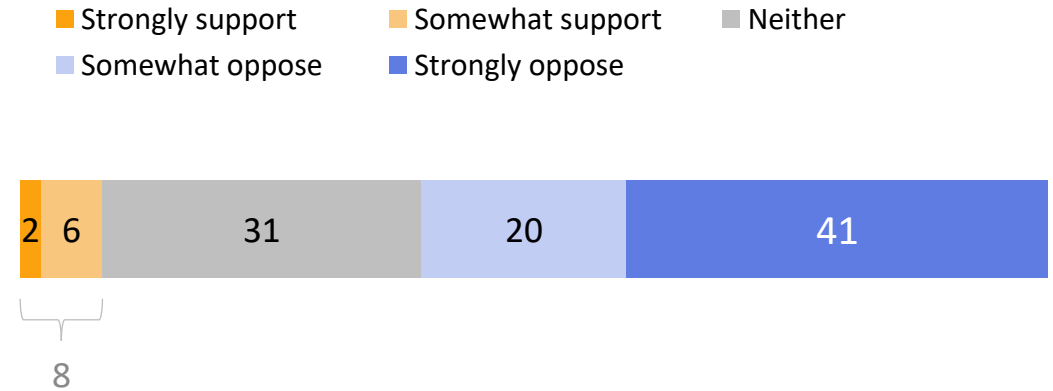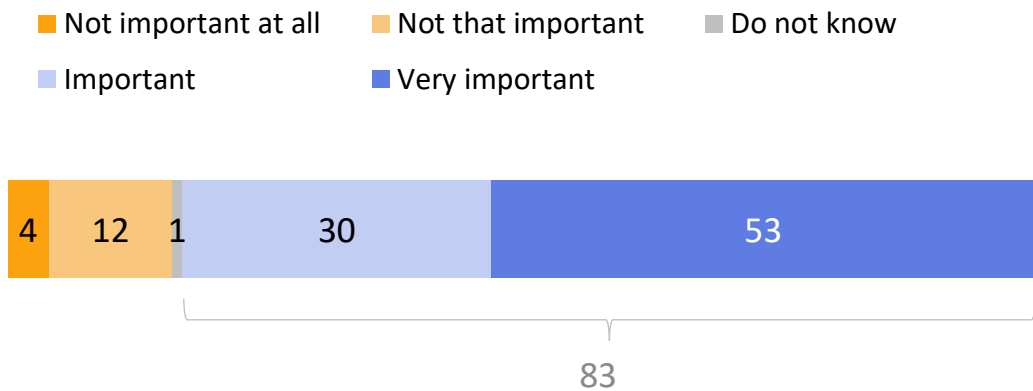| Flavor	%
Tobacco	27
Sweet, dessert	25
Fruit	23
Mint / Menthol	23
Other	2

Importance of flavors and opinion about a flavor ban

83% of German vapers say flavors are important or very important in their decision to vape.
Therefore, only 8% would support a flavor ban.

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Data in %

Importance of flavors

- ■ Not important at all
- ■ Not that important
- ■ Do not know
- ■ Important
- ■ Very important

| 4 | 12 | 1 | 30 | 53 |

83

Opinion about a flavor ban

- ■ Strongly support
- ■ Somewhat support
- ■ Neither
- ■ Somewhat oppose
- ■ Strongly oppose

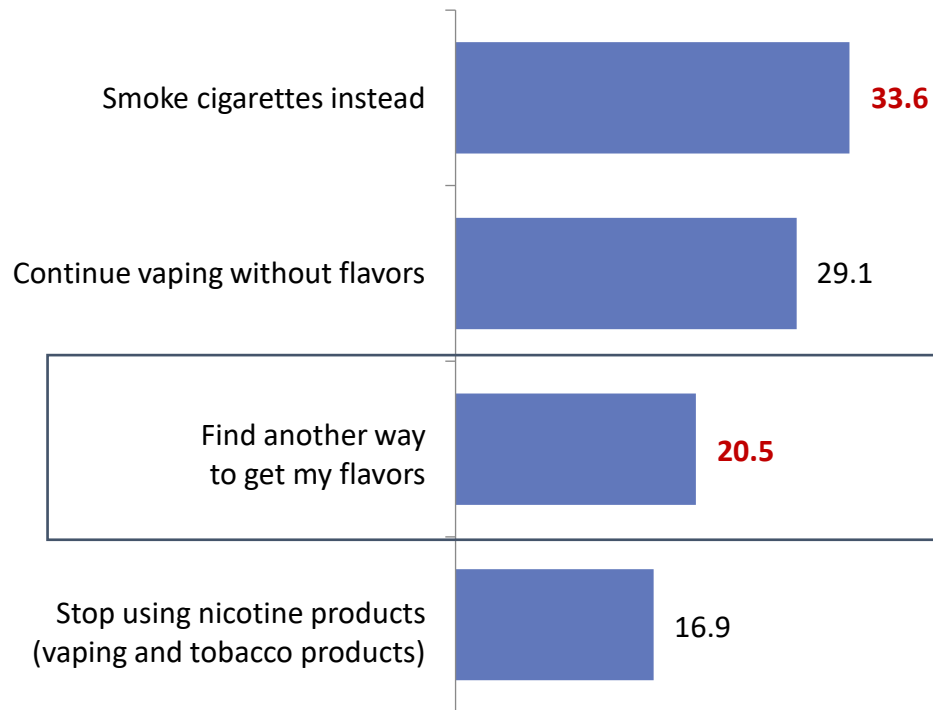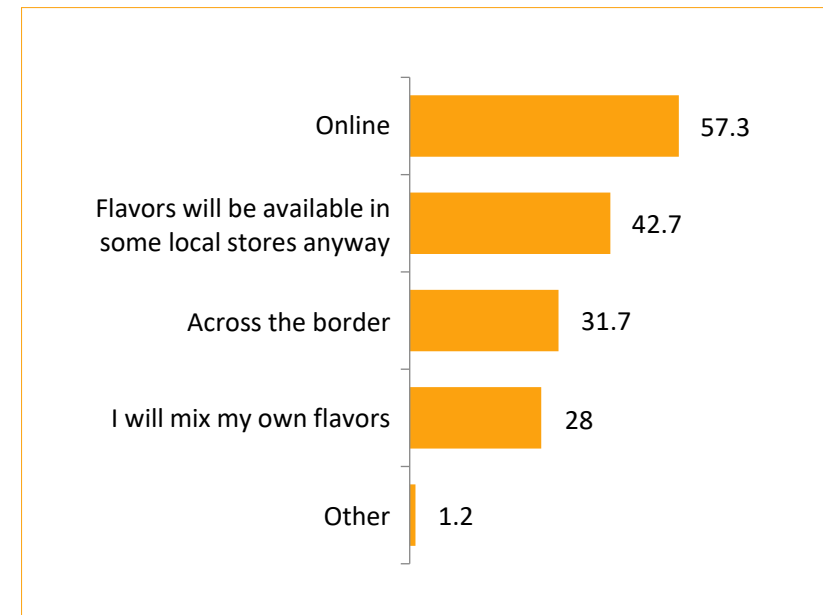| 2 | 6 | 31 | 20 | 41 |

8

What would happen after a flavor ban

A flavor ban could push more than half of German vapers back to smoking, to the black market or to mix their own liquids.

Data in %

Left chart:
- Smoke cigarettes instead: **33.6**
- Continue vaping without flavors: 29.1
- Find another way to get my flavors: **20.5**
- Stop using nicotine products (vaping and tobacco products): 16.9

How would you get them?
(N=82)

Right chart:
- Online: 57.3
- Flavors will be available in some local stores anyway: 42.7
- Across the border: 31.7
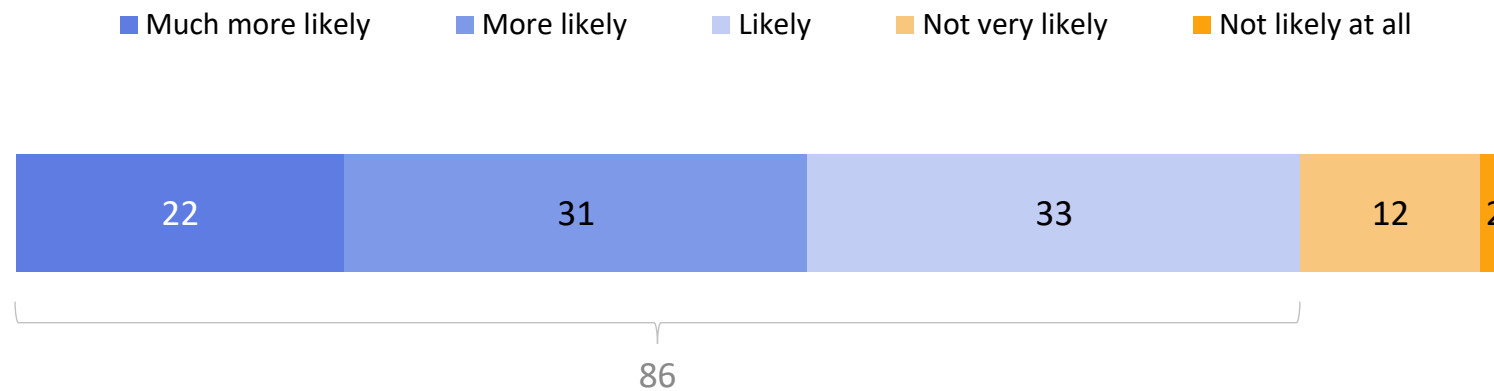- I will mix my own flavors: 28
- Other: 1.2

Risk of returning to cigarettes

86% of German vapers think a flavor ban could push vapers back to smoking.

How likely are vapers to return to smoking following the flavor ban?

■ Much more likely   ■ More likely   ■ Likely   ■ Not very likely   ■ Not likely at all
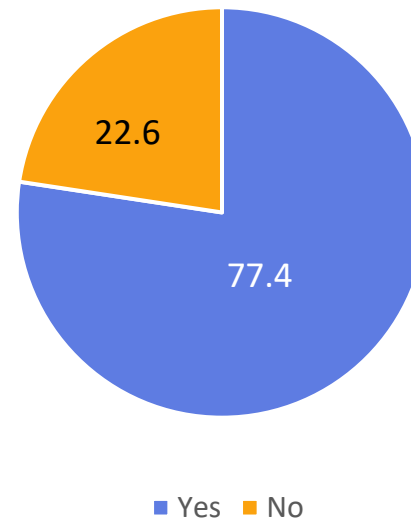
| 22 | 31 | 33 | 12 | 2 |

86

Support of alternatives to cigarettes

Almost 80% of German vapers believe the government should support less harmful alternatives to smoking.
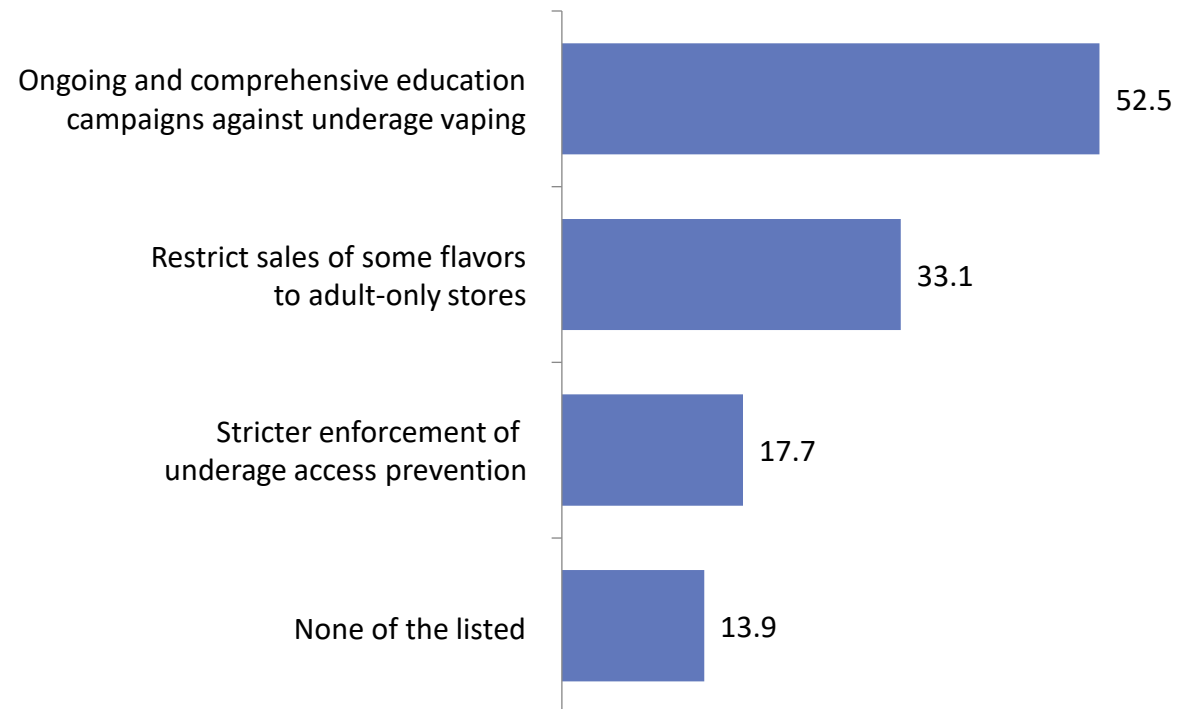
Data in %

Should the government support less harmful alternatives to smoking?

22.6

77.4

■ Yes ■ No

Support for alternatives to flavor bans

Over 85% of German vapers support alternative ways of preventing underaged access, primarily through education campaigns.

Data in %

Ongoing and comprehensive education campaigns against underage vaping — 52.5

Restrict sales of some flavors to adult-only stores — 33.1

Stricter enforcement of underage access prevention — 17.7

None of the listed — 13.9