

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

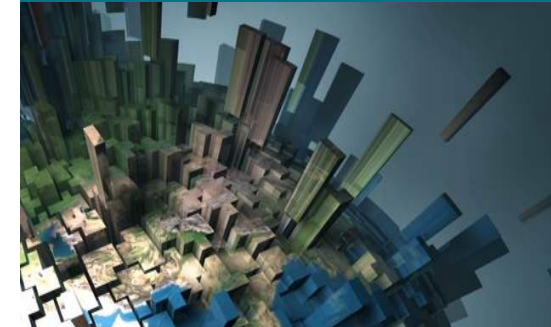


N=301 adults

Nationally representative on base of gender

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

FIELDWORK



13.04. – 15.04. 2022.

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.

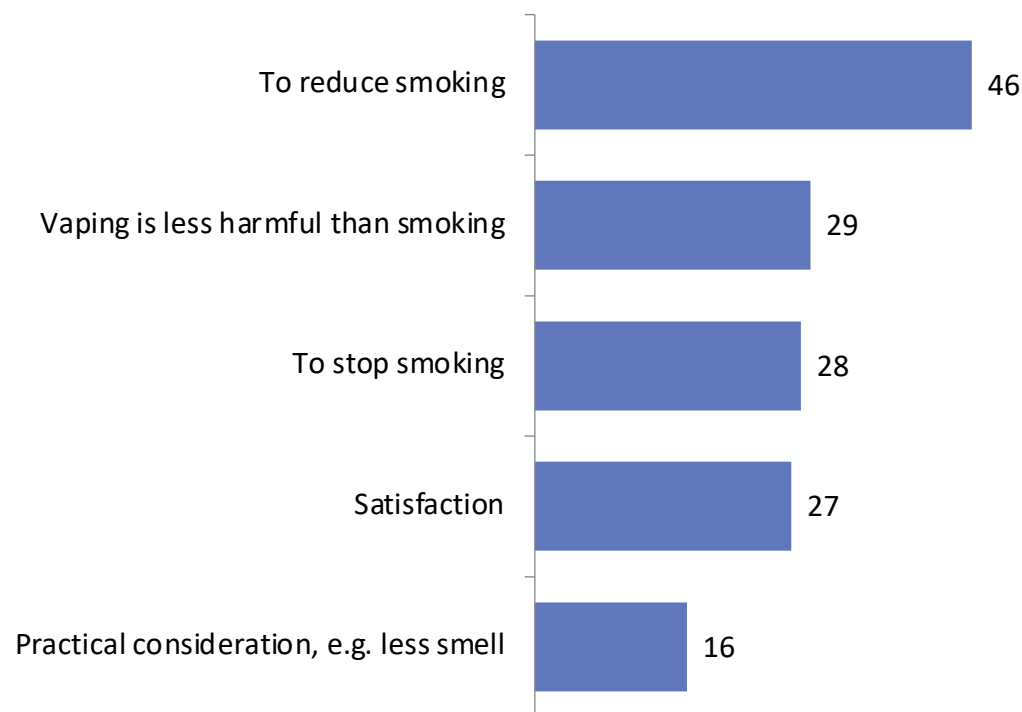


REASONS FOR VAPING AND FLAVORS USED

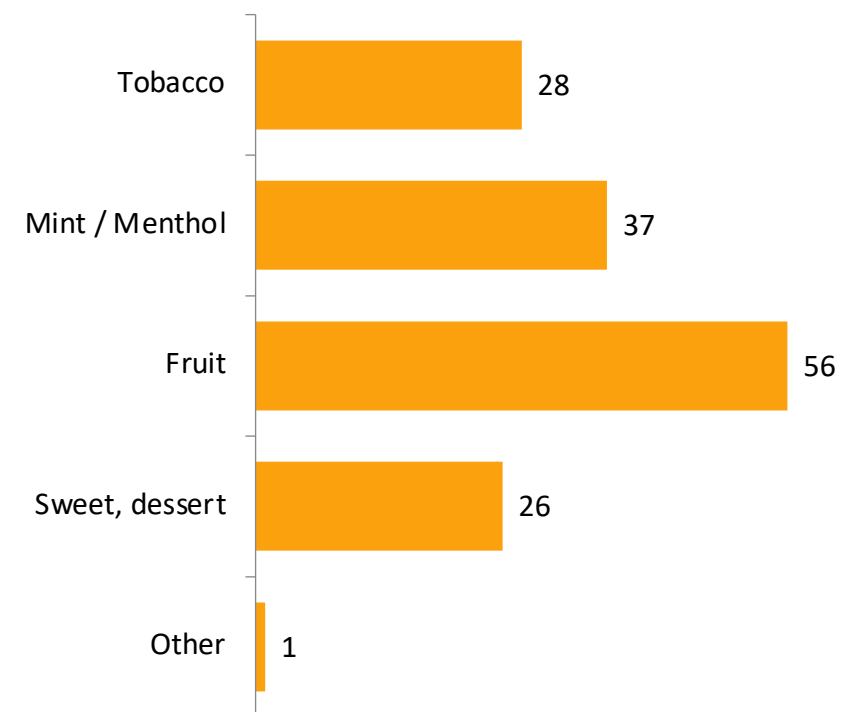
Belgian vapers have indicated that they vape to reduce and quit smoking. Approximately 1/3 vape because vaping is less harmful than smoking. 3/4 vape flavors other than Tobacco.

Data in %

Main reason for vaping – Total



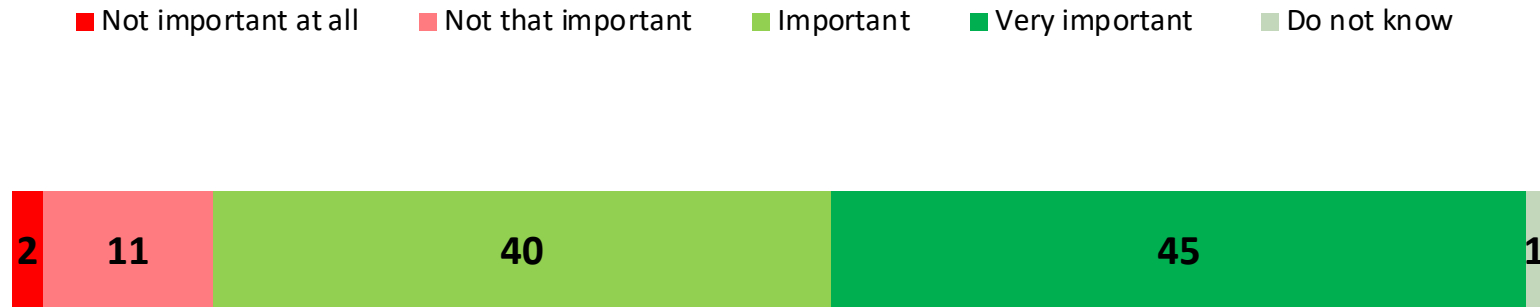
Usage of flavor – Total



IMPORTANCE OF FLAVORS

Almost 90% of Belgian vapers consider flavors to be important when it comes to their decision to vape.

Data in %

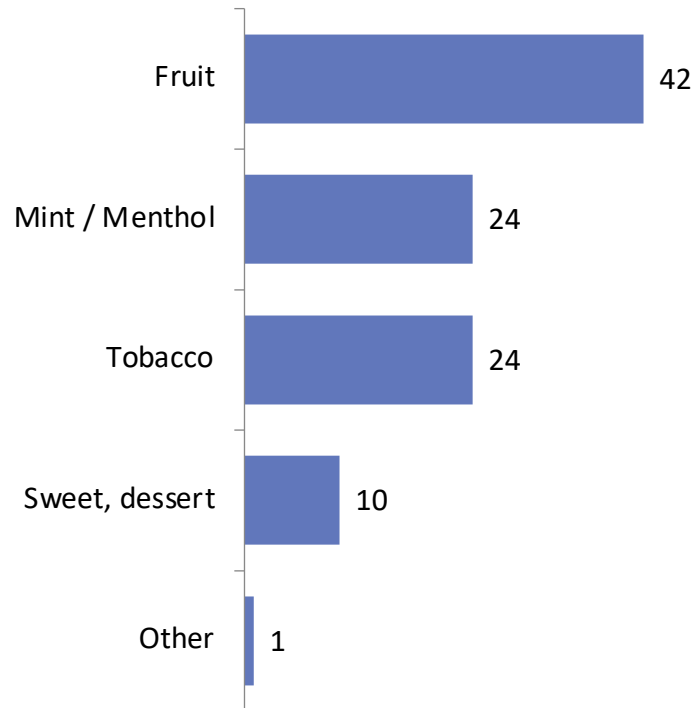


SWITCHING AND STAYING AWAY FROM SMOKING

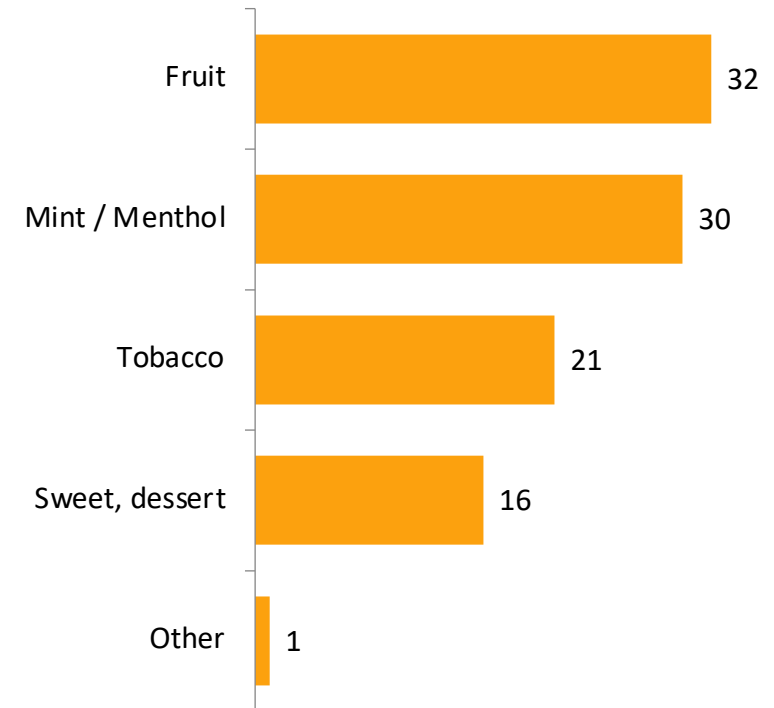
Fruit flavors are key for Belgian vapers to switch and stay away from smoking. Mint/Menthol flavors are also strongly associated with staying away from smoking.

Data in %

What flavor helps switching from smoking to vaping



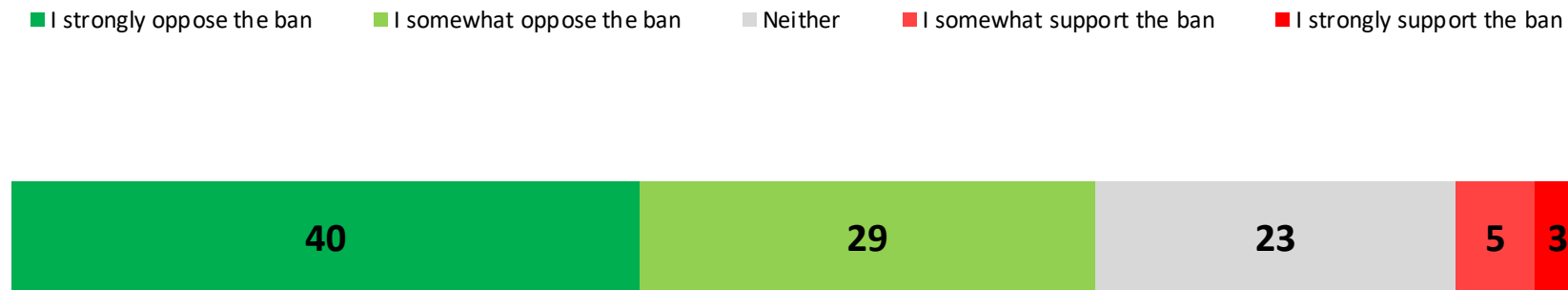
What flavor helps staying away from smoking



OPINION ON GOVERNMENT BANNING FLAVORS

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

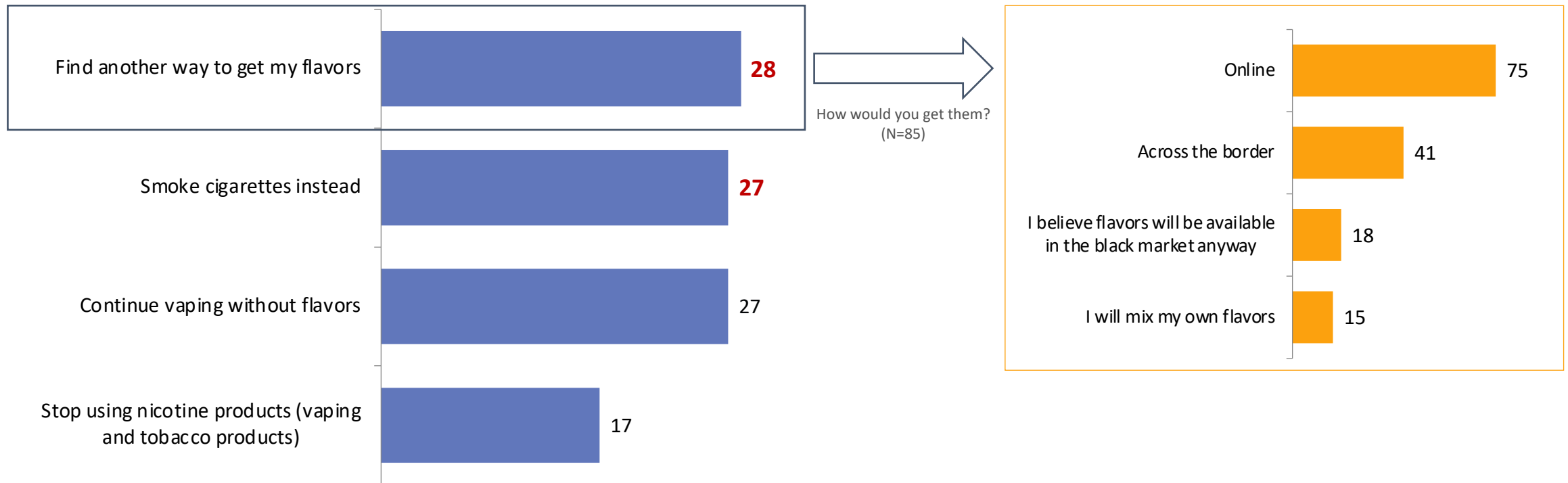
Data in %



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.

Data in %





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.

Data in %

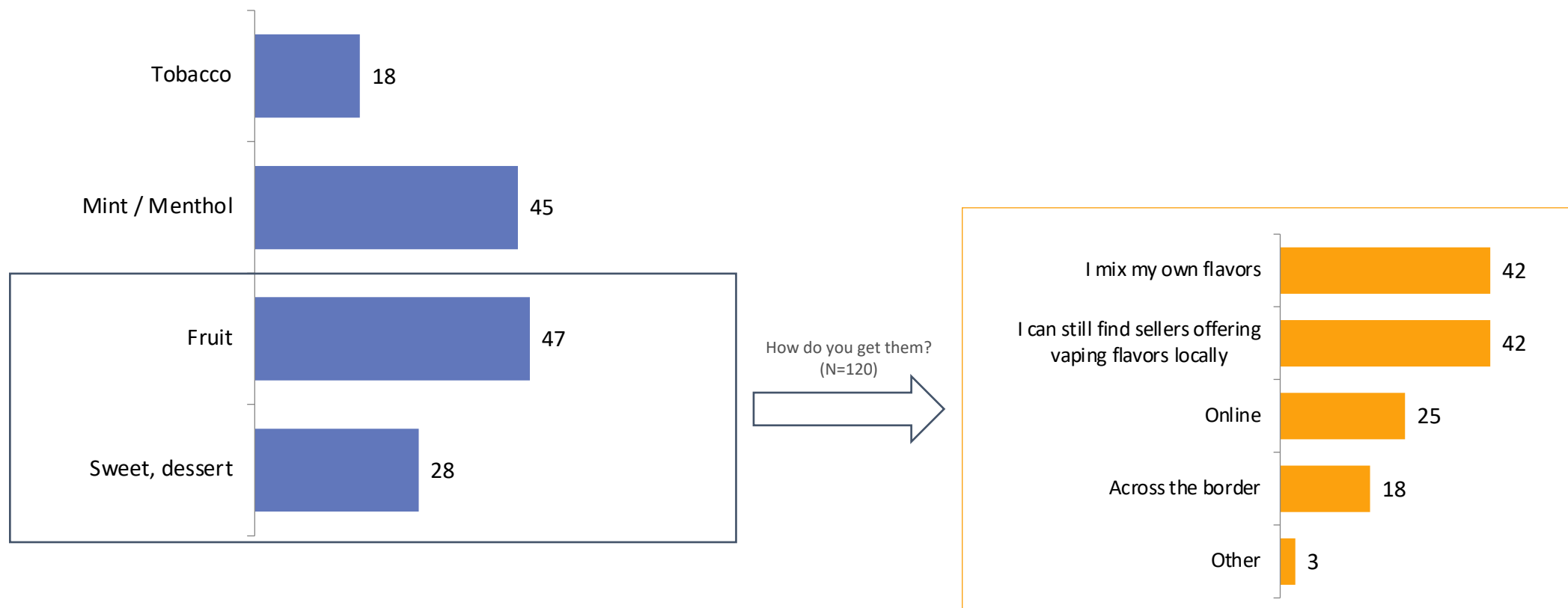




THE CASE OF ESTONIA – FLAVOR BAN IN PLACE

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.

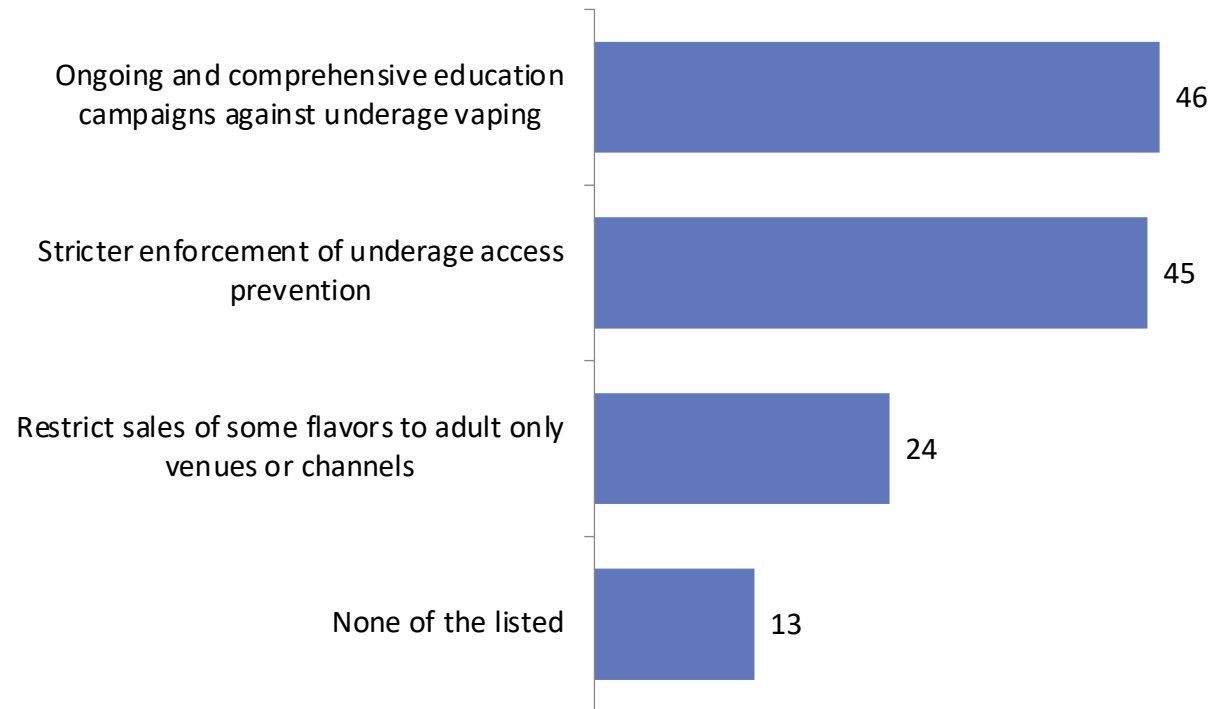
Data in %



SUPPORT FOR ALTERNATIVES TO FLAVOR BANS

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

Data in %



THANK YOU