

CALIFORNIA

VAPING FLAVOR BAN

2023

METHODOLOGY & SAMPLE



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



N=602 adults

State representative on base of gender and type of vaping device used

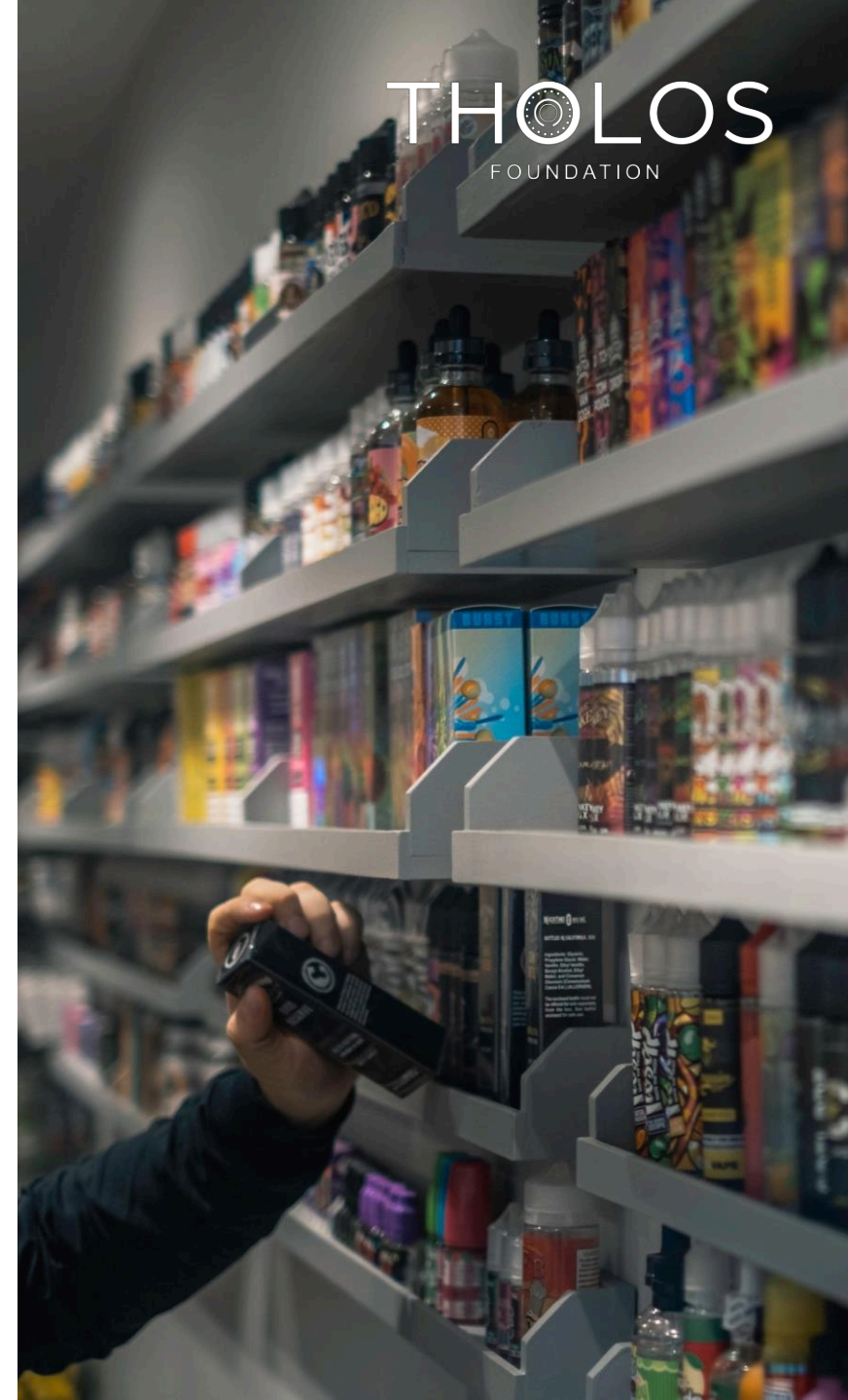


05.05. – 17.05. 2023.

Logic and data quality control done on 100% of sample

KEY FINDINGS

- Almost **70% of Californian vapers vape due to health-related reasons**, including to reduce or stop smoking. **85% say flavors are important or very important in their decision to vape.**
- In December 2022, California banned vaping flavors other than tobacco. **Only 17% of Californian vapers support the flavor ban**, while almost **60% are against it.** The widespread availability of banned flavors may explain why more Californian vapers are not staunchly against the prohibition.
- Despite flavor bans, vapers continue to look for their flavors of choice. **Almost 90% of Californian vapers still use one of the banned flavors**, with the most common being fruit. **Almost 60% still find banned flavors in local shops and 56% buy them online.**
- **85% of Californian vapers say it is easy to find banned flavors.** More than 3/4 have seen banned flavors available for sale during their last 10 purchases.



KEY FINDINGS

- **90% of Californian vapers think the flavor ban will increase smuggling, with 2/3 considering it very likely. 80% believe interactions with law enforcement will increase.**
- **85% of Californian vapers think the flavor ban could push vapers back to smoking.** Over half consider this very likely.
- Of the Californian vapers who had an opinion, **85% believe the government should support less harmful alternatives to smoking.**
- **Over 90% of Californian vapers support alternative ways of preventing underage access,** including education campaigns, stricter enforcement, and restricting some flavors to adult-only stores.

THOLOS
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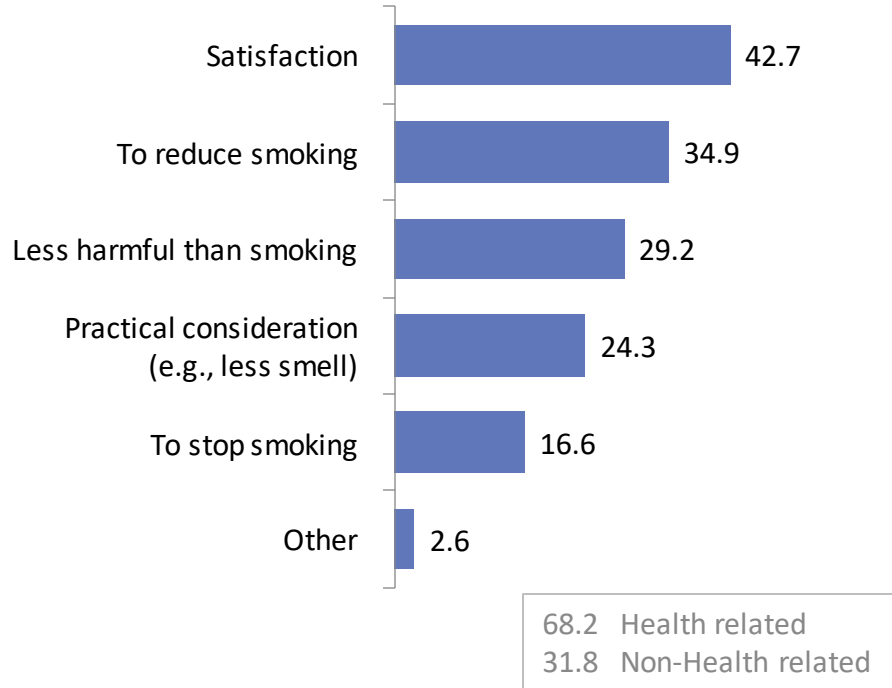


Reasons for vaping and importance of flavors

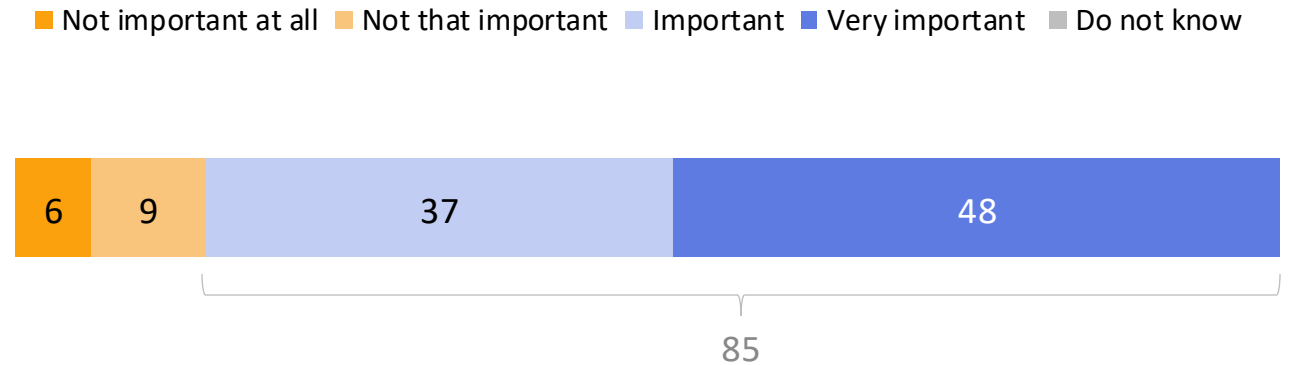
Almost 70% of Californian vapers vape due to health-related reasons, including to reduce or stop smoking. 85% say flavors are important or very important in their decision to vape.

Data in %

Main reasons for vaping



Importance of flavors



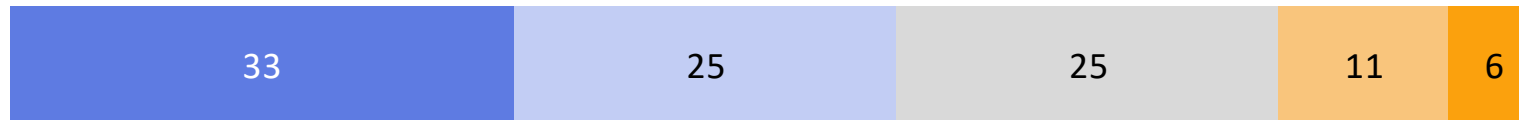
Opinion on the flavor ban

Only 17% of Californian vapers support the flavor ban, while almost 60% are against it. The widespread availability of banned flavors may explain why more Californian vapers are not staunchly against the prohibition.

Data in %

How do you feel about the flavor ban?

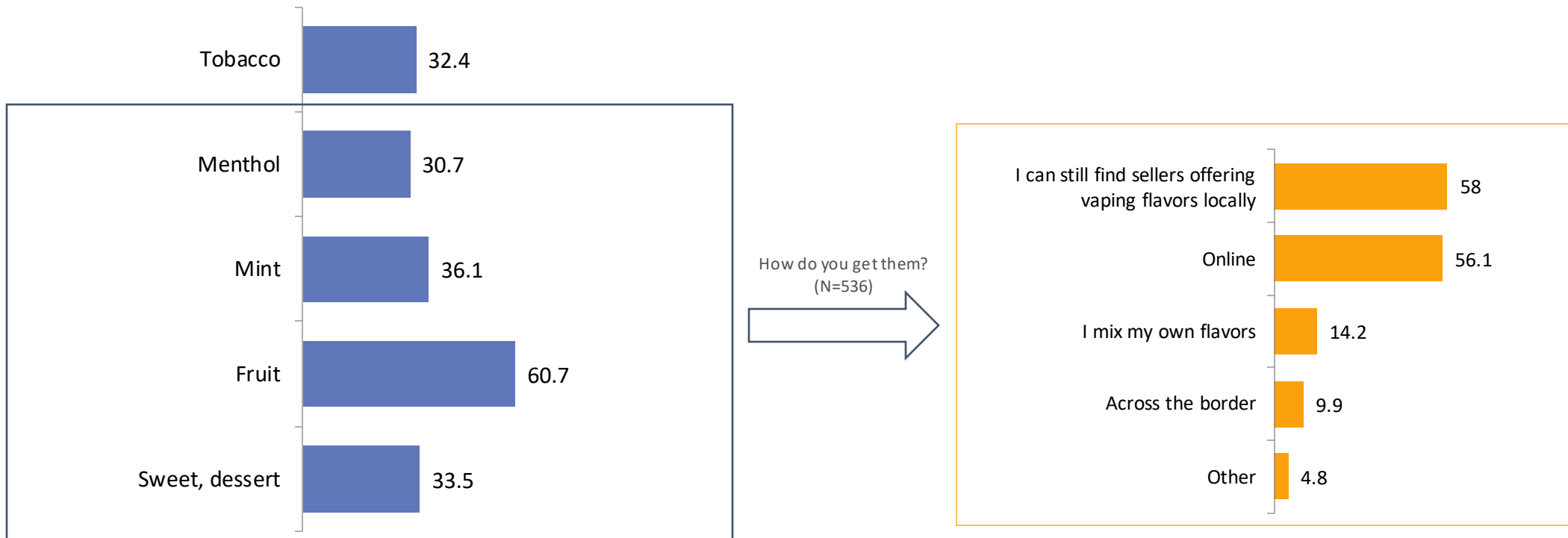
■ Strongly oppose ■ Somewhat oppose ■ Neither ■ Somewhat support ■ Strongly support



What happens after flavor bans

Despite flavor bans, vapers continue to look for their flavors of choice. Almost 90% of Californian vapers still use one of the banned flavors, with the most common being fruit. Almost 60% still find banned flavors in local shops and 56% buy them online.

Data in %

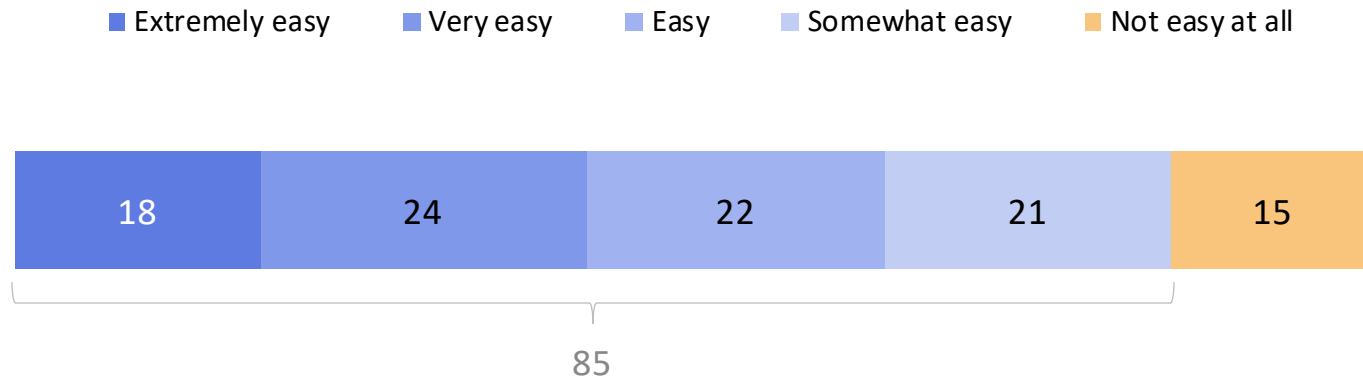


Availability of banned flavors

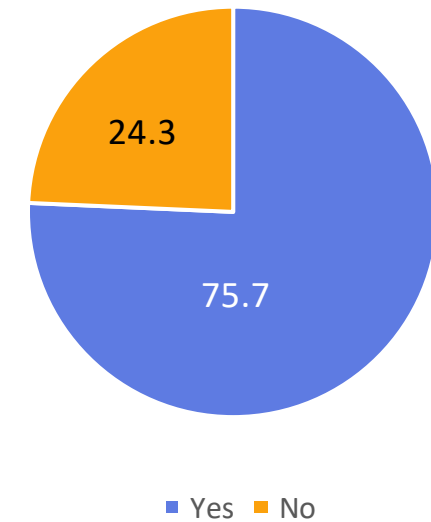
85% of Californian vapers say it is easy to find banned flavors. More than 3/4 have seen banned flavors available for sale during their last 10 purchases.

Data in %

How easy is it to get vaping flavors other than tobacco?



Seen banned flavors on offer during the last 10 purchases

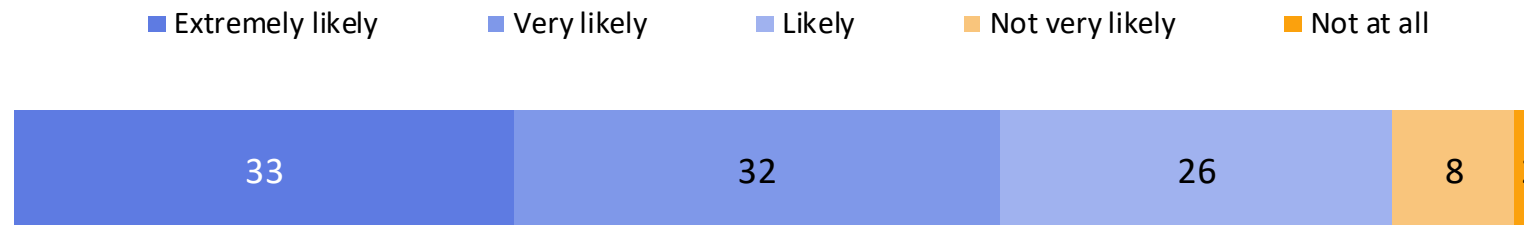


Smuggling and interaction with law enforcement

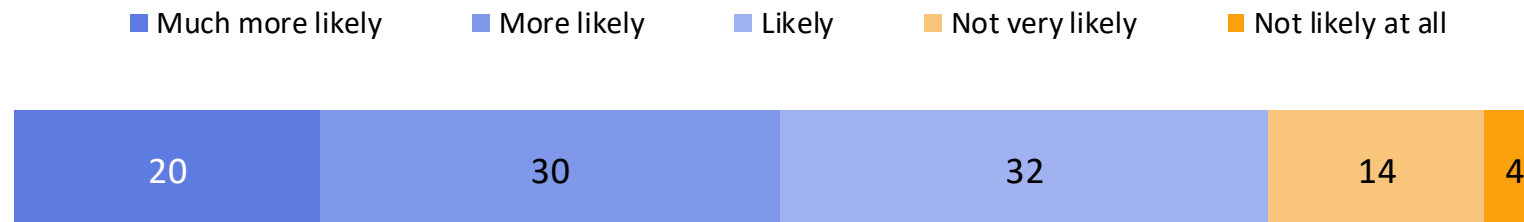
90% of Californian vapers think the flavor ban will increase smuggling, with 2/3 considering it very likely. 80% believe interactions with law enforcement will increase.

Data in %

Smuggling will increase



Interaction with law enforcement will increase



Risk of returning to cigarettes

85% of Californian vapers think the flavor ban could push vapers back to smoking. Over half consider this very likely.

Data in %

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

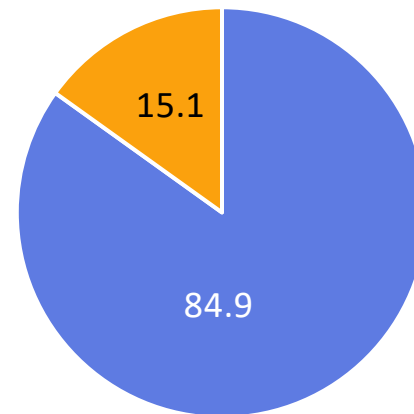


Support of alternatives to cigarettes

Of the Californian vapers who had an opinion, 85% believe the government should support less harmful alternatives to smoking.

Data in %

Should the government support less harmful alternatives to smoking?

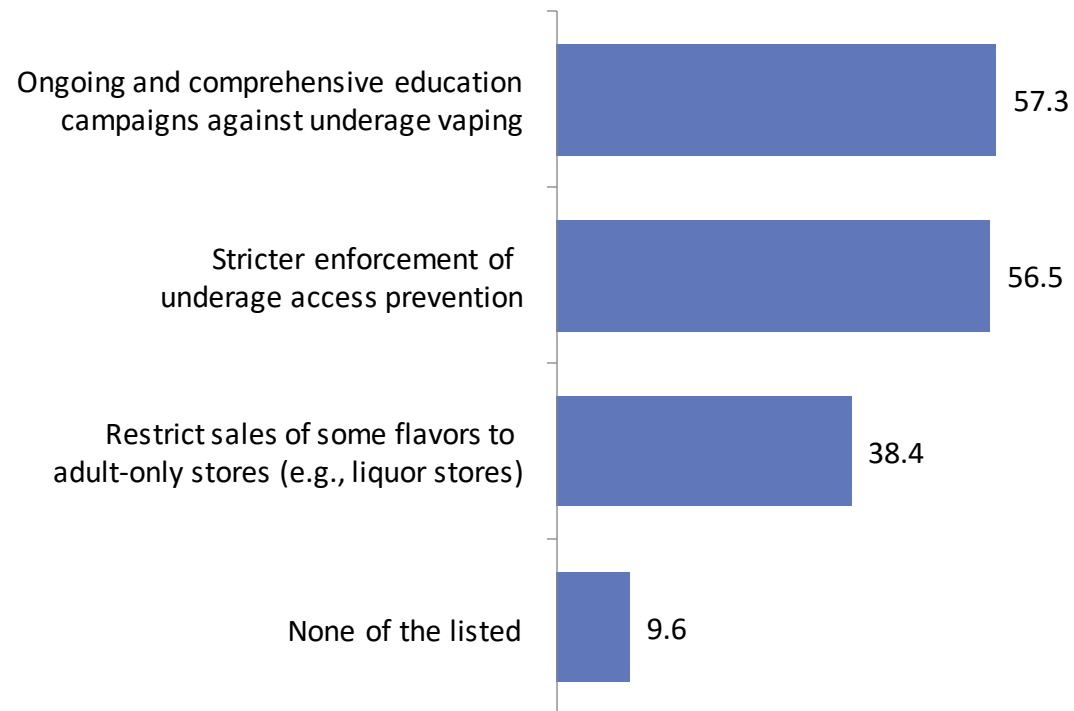


■ Yes ■ No

Support for alternatives to flavor bans

Over 90% of Californian vapers support alternative ways of preventing underage access, including education campaigns, stricter enforcement, and restricting some flavors to adult-only stores.

Data in %



THANK YOU