VAPING FLAVOR BAN

CALIFORNIA
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=602 adults
State representative on base of gender and type of vaping device used

FIELDWORK

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 underaged access, including education campaigns, stricter enforcement, and restricting some flavors to adult-only stores.
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.

Main reasons for vaping

- Satisfaction: 42.7%
- To reduce smoking: 34.9%
- Less harmful than smoking: 29.2%
- Practical consideration (e.g., less smell): 24.3%
- To stop smoking: 16.6%
- Other: 2.6%

Importance of flavors

- Not important at all: 6%
- Not that important: 9%
- Important: 37%
- Very important: 48%
- Don't know: 8%
## 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.

### How do you feel about the flavor ban?

<table>
<thead>
<tr>
<th>Opinion</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly oppose</td>
<td>33%</td>
</tr>
<tr>
<td>Somewhat oppose</td>
<td>25%</td>
</tr>
<tr>
<td>Neither</td>
<td>25%</td>
</tr>
<tr>
<td>Somewhat support</td>
<td>11%</td>
</tr>
<tr>
<td>Strongly support</td>
<td>6%</td>
</tr>
</tbody>
</table>

Data in %

*Ipsos Consumer Survey, May 2023*

*N=602 How do you feel about the state-wide vaping flavor ban?*
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 %

I can still find sellers offering vaping flavors locally 58
Online 56.1
I mix my own flavors 14.2
Across the border 9.9
Other 4.8

How do you get them? (N=536)

Tobacco 32.4
Menthol 30.7
Mint 36.1
Fruit 60.7
Sweet, dessert 33.5

Ipsos Consumer Survey, May 2023
N=602 Which vaping flavor do you normally use? [MCQ]; N=536 You mentioned that you use mint, menthol, fruit, sweet, dessert, or other flavors – how do you get them? [MCQ]
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.

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

- Extremely easy: 18
- Very easy: 24
- Easy: 22
- Somewhat easy: 21
- Not easy at all: 15

Seen banned flavors on offer during the last 10 purchases

- Yes: 75.7%
- No: 24.3%
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.
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.
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 %

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Ipsos Consumer Survey, May 2023

N=602 In your opinion, should the government be more supportive of products that are less harmful alternatives to cigarettes, such as vaping?
Support for alternatives to flavor bans

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

Data in%

- Ongoing and comprehensive education campaigns against underage vaping: 57.3%
- Stricter enforcement of underage access prevention: 56.5%
- Restrict sales of some flavors to adult-only stores (e.g., liquor stores): 38.4%
- None of the listed: 9.6%
THANK YOU