

CALIFORNIA

VAPING FLAVOR BAN

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

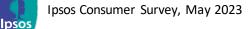
State representative on base of gender and type of vaping device used

FIELDWORK



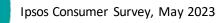
05.05. - 17.05. 2023.

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.

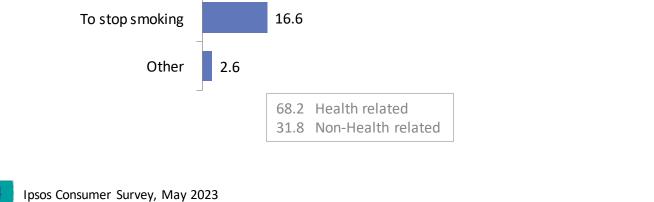




KEY FINDINGS

- 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.

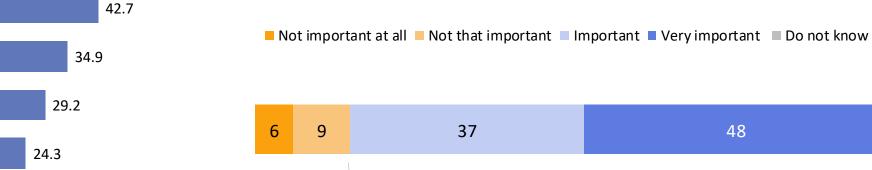




N=602 Why do you vape? [MCQ]; How important are flavors in your decision to vape?

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.



Main reasons for vaping

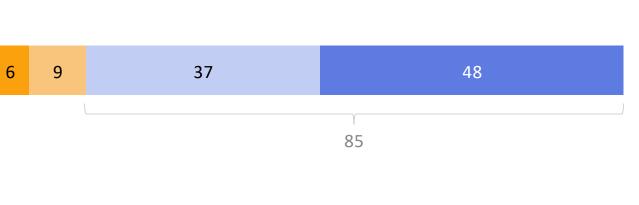
Satisfaction

To reduce smoking

Less harmful than smoking

Practical consideration

(e.g., less smell)



Importance of flavors



Data in %

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 %



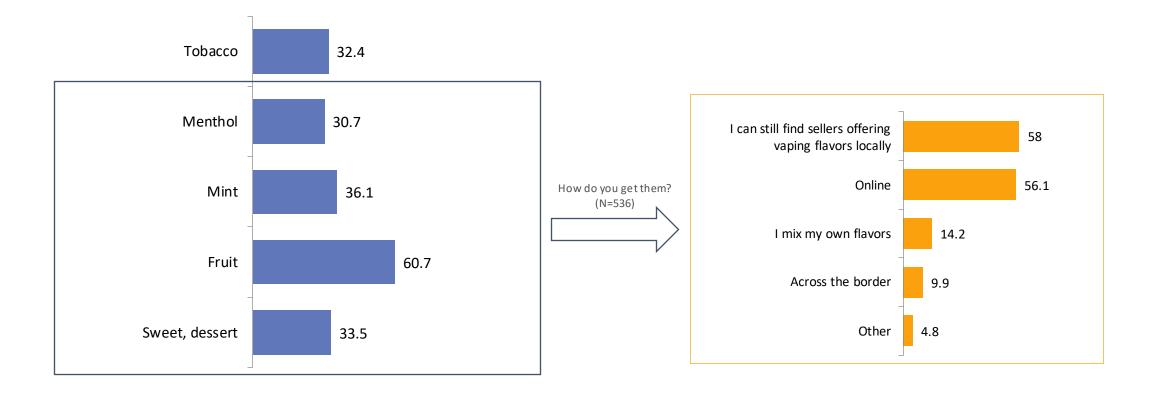


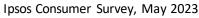
What happens after flavor bans

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 %





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

Very easy

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?

Easy

Seen banned flavors on offer during the last 10 purchases

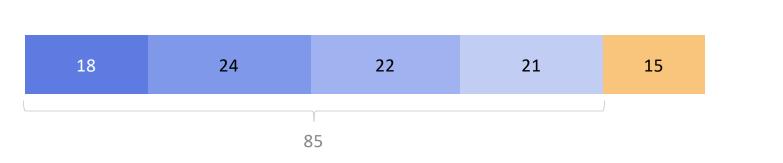
Ipsos Consumer Survey, May 2023

pso

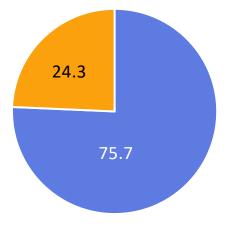
Extremely easy

N=536 In December 2022, California banned vaping flavors other than tobacco. How easy is it to get vaping flavors other than tobacco?; N=602 During your last 10 purchases for e-cigarettes, were you able to purchase vaping flavors other than tobacco or did you see it on offer?

Not easy at all



Somewhat easy





Data in %

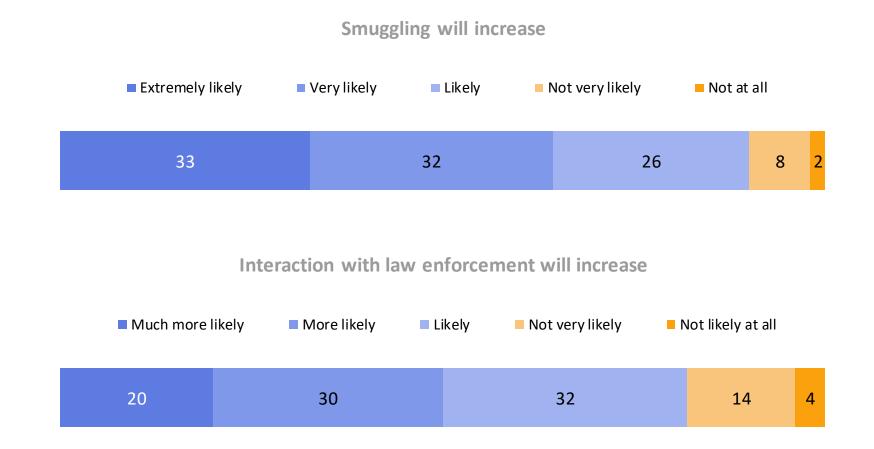
Yes No

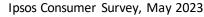
Smuggling and interaction with law enforcement

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 %





pso

N=602 How likely do you think the flavor ban will increase smuggling for all tobacco and nicotine products; Some have argued that the state-wide vaping flavor ban may increase frequency of interactions between tobacco/nicotine consumers and law enforcement. How likely do you think this potential interaction may be?

23

85% of Californian vapers think the 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
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32

31

Over half consider this very likely.

lpso



Data in %



12

3

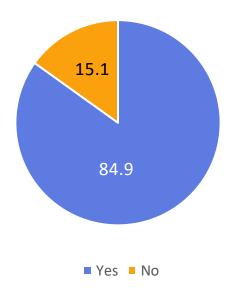
Support of alternatives to cigarettes

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



Data in %

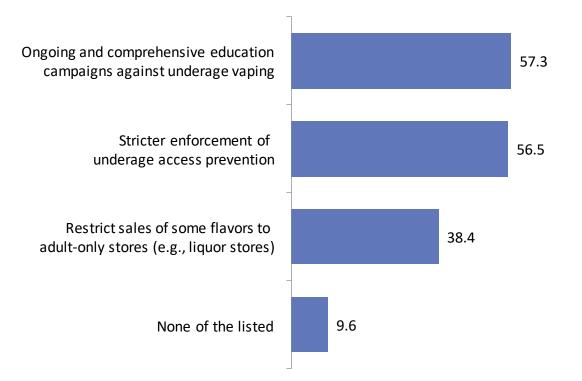
Should the government support less harmful alternatives to smoking?



Ipsos Consumer Survey, May 2023 Ipsos 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







Data in %



THANK YOU