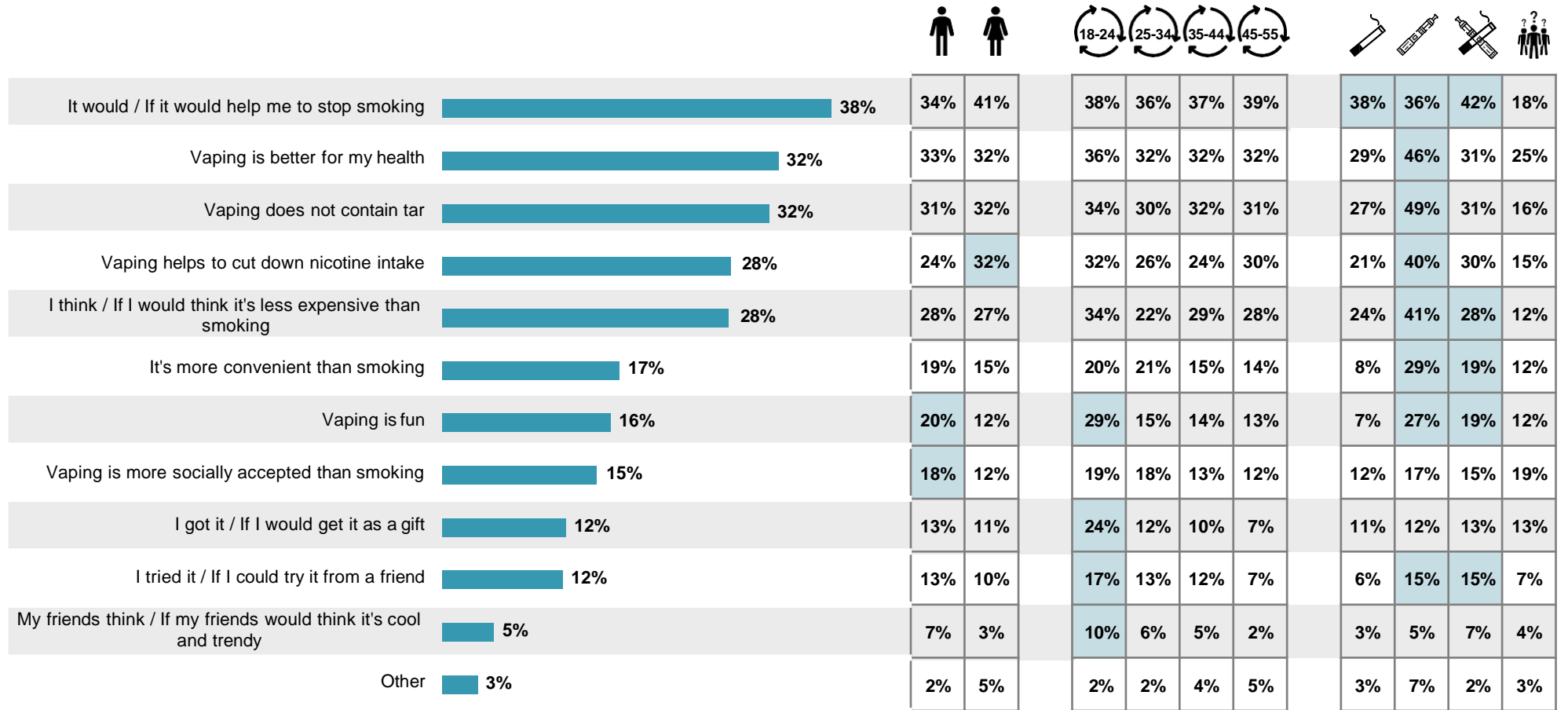




Report December 2019

Exploring the Vaping landscape in Belgium

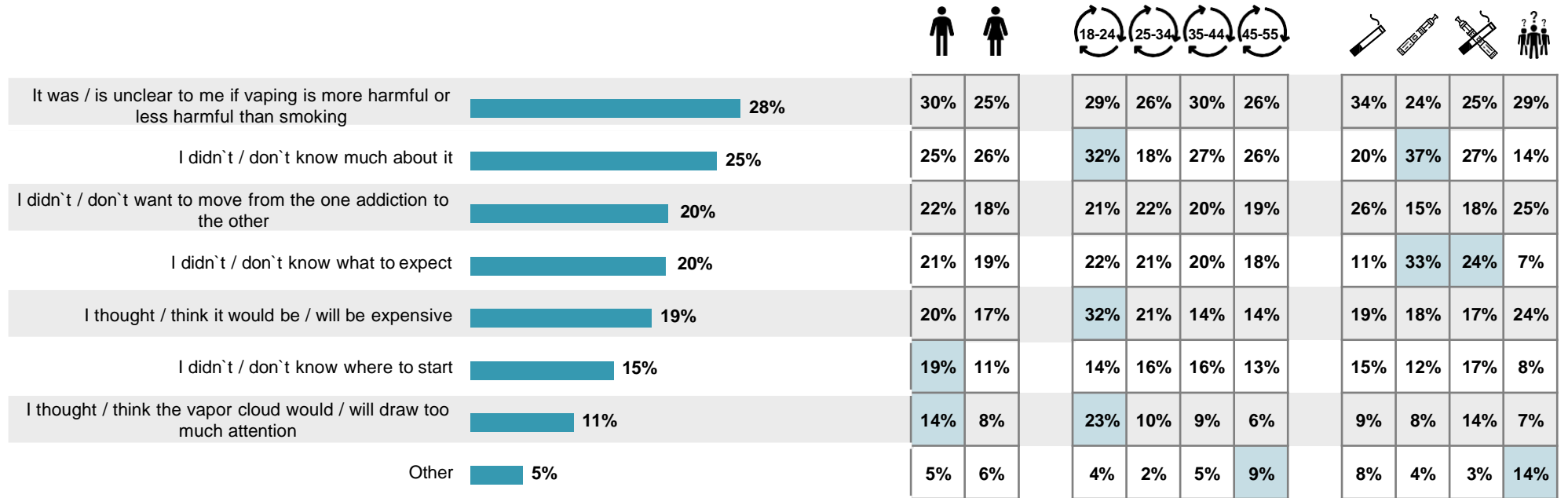
For current smokers, the fact that vaping can help them quit smoking is the most important driver to start vaping. For true vapers, the drivers related to health, such as the fact that it is better for their health than smoking and that it does not contain tar, are the most important drivers.



Q: What convinced / would convince you to start vaping? | n = 737

Sign. (95%) higher

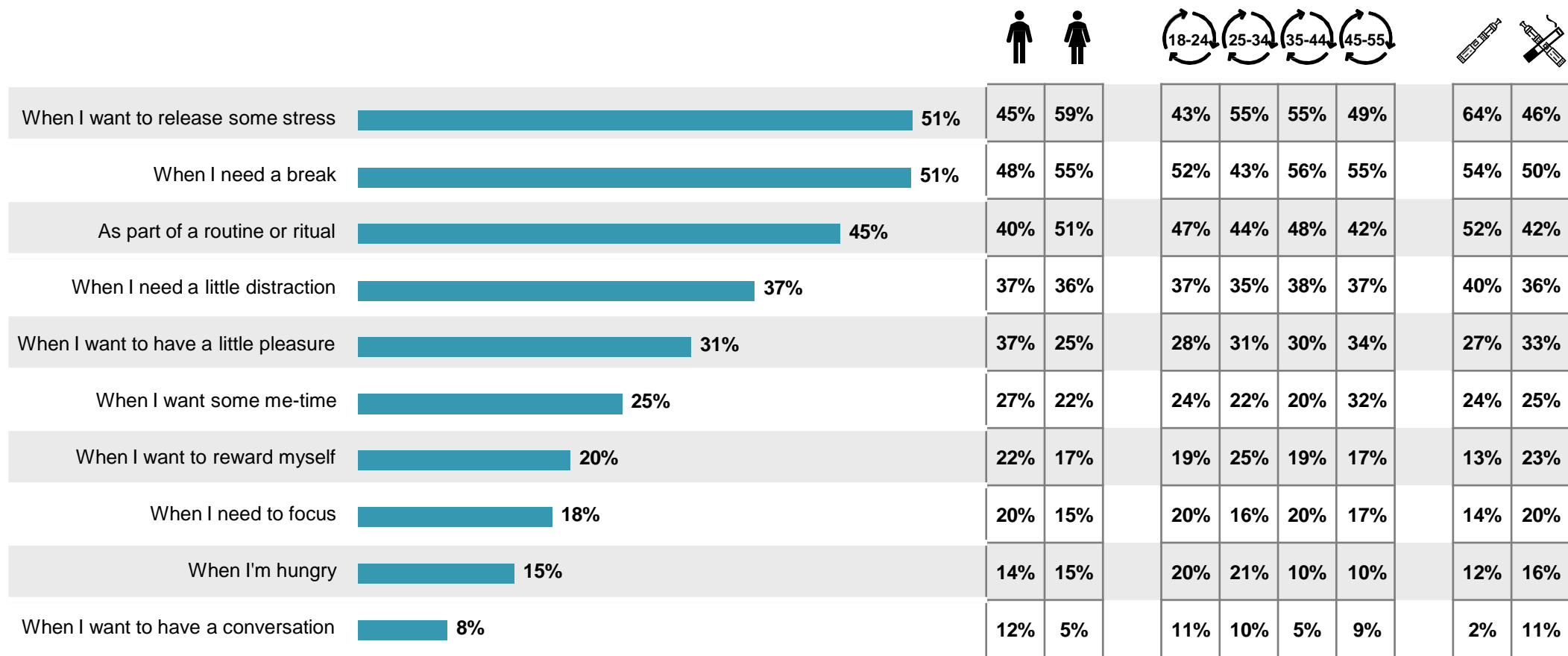
The fact that many people did not know or do not know much about whether vaping is more or less damaging to health than smoking prevented or prevent many people from starting vaping. In general, it is mainly ignorance and lack of clarity about vaping that prevents people from starting it.



Q: What hold / held you back to start vaping? | n = 737

■ Sign. (95%) higher

Reducing stress and the need for a break are the main needs that make people resort to vaping. Half of the consumers say that in these situations they really enjoy vaping. A large part (45%) also does this as part of a routine.

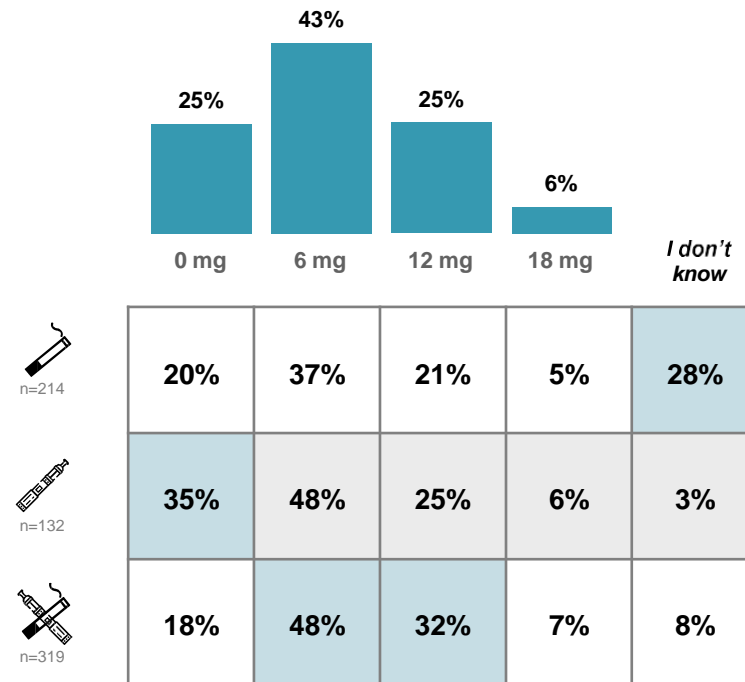


Q: Which of these situations do you most enjoy to have a vape? Please rank your top 3 situations.

■ Sign. (95%) higher

In terms of nicotine level preference, true vapers clearly have a preference for lighter nicotine levels. They have a stronger preference for 0mg nicotine compared to conflicted smokers and dual users. Dual users have a broader preference and 1 in 3 of them prefer the 12mg nicotine. Conflicted smokers have a less pronounced opinion as 28% indicate that they don't know what they would prefer.

NICOTINE LEVEL PREFERENCE



■ Sign. (95%) higher

Q: When looking for a (new) vaping device and consider the available cartridges, which of the following nicotine levels would you be most interested in? | n = 737