

Against the backdrop of a huge rise in popularity of disposable vapes over the past five years,¹ we anticipate numerous changes and opportunities in consumer and brand behaviour that are set to reshape this multi-billion-pound industry in the year ahead...

Recent figures from a 2024 study reveal that just over 30% of vapers rely on disposables as their primary device of choice, a number that jumps to 52% among those aged 18 to 24.¹ With the UK poised to implement a ban on disposables this June, vape consumers of all ages face a pivotal decision: **what alternatives are there once disposables vanish from the shelves?**

Here are four key factors that we anticipate will influence the vape industry in 2025...

Staying present matters

A recent research campaign conducted by ALFA Connect Group across the UK convenience sector (Autumn 2024) revealed a significant link: strong brand advertising and a robust promotional presence in convenience retail settings notably increase the likelihood of the advertised brand becoming the top seller in that store.² In fact, when promotional presence is executed well, there's a 40% increase in the likelihood of the vape brand being the top seller in store. Added to this, we found that, aside from better pricing offers, over three-quarters of the retailers involved in ALFA's research are calling for vape brands to be better connected with them through promotional merchandising and improved customer service.³ This is not ignoring the potential “chicken and egg” situation this describes of course: where customer demand is higher for a product, retailers will respond by advertising that product more, and vice versa. However, ALFA's findings here underscore the critical role of in-store visibility and strategic brand positioning in driving and influencing vape sales—making it clear that consistent presence is not just an advantage but a necessity in the competitive vape market.

The Innovation That is Redefining User Experience

In light of the oncoming ban on disposables, vape brands are continuing to heavily invest in smarter and more innovative devices. These “smart” vape products typically feature customisable settings, refillable modules, Bluetooth connectivity, and integrated displays—all designed to enhance user engagement and encourage adoption. Critics argue that certain features of smart devices, such as built-in video games, coupled with candy-based flavours, are deliberate attempts to appeal to younger consumers.^{4,5} Nonetheless, these advanced features and customisable options are expected to grow in popularity as consumers shift toward longer-lasting, reusable, and tailored alternatives to disposables. With over half of UK youths encountering vape promotions primarily in shops rather than online, it is vital to balance innovation with responsible marketing.⁶ By targeting awareness efforts at retail spaces, the industry can safeguard public health while simultaneously enhance user experiences.

¹ Action on Smoking and Health (2024) “Use of vapes (e-cigarettes) among adults in Great Britain.” [Online]. Available from: <https://ash.org.uk/uploads/Use-of-vapes-among-adults-in-Great-Britain-2024.pdf>

² ALFA Connect Group (2024) “Independent Retail Purchasing and Brand opinions in the Vape Industry – 150 retailers in London and Southeast England, 2024”. [Internally Commissioned Research].

³ Alfa Connect Group (2025) “Vape Survey: Retail and Shop Owners”. [Internally Commissioned Research].

⁴ See for example, New York Post (2024) (author: R Calder) “New ‘smart vapes’ have built-in video games to attract teens, critics warn” [Online]. Available from: <https://nypost.com/2024/08/10/us-news/new-smart-vapes-attract-kids-with-built-in-video-games/>

⁵ Kaplan, B., Herdesty, J.J., Welding, K., Breland, A., Eissenberg, T., Cohen, J.E. (2023) “Electronic Nicotine Delivery System flavor [sic] use over time by age group in the US: a longitudinal analysis”. Vol 21(67). [Online] Available from: <https://www.tobaccoinduceddiseases.org/Electronic-Nicotine-Delivery-System-flavor-use-over-time-by-age-group-in-the-US-A%2C162365%2C0%2C2.html?>

⁶ Action on Smoking and Health (2024) “Use of vapes (e-cigarettes) among young people in Great Britain” [Online]. Available from: <https://ash.org.uk/uploads/Use-of-vapes-among-young-people-in-Great-Britain-2024.pdf>

It's a Matter of Taste

Fruity flavours continue to dominate the vaping market, with nearly half of consumers favouring this category.⁷ To capitalise on this demand, vape supply chains must ensure sufficient availability of refills, as disposables phase out. Failing to meet these expectations will risk driving customers toward competing brands, resulting in a potential loss of market share. This concern is echoed by retailers interviewed by ALFA, who expressed frustration over the current challenges in reliably sourcing refills for the combination and pod systems they stock.⁸ Added to this, there is wider evidence that suggests vapers strongly maintain their preference of flavour over time,⁹ indicating that a significant portion may switch brands if their favoured flavour/refill becomes unavailable. In some extreme cases, up to four in every ten vapers state they will switch back to smoking tobacco if their preferred single use vape flavour were removed from shelves and no alternative provided.^{10,11} Overall, it is vitally important that brands prioritise consistency and offer easy transitions from disposables to refillable options with similar flavours and readily available refills. This approach can only serve to strengthen customer loyalty and secure market position.

Why Customer Experience Will Make or Break the Vape Industry

In an increasingly competitive and regulated vape market, one crucial element stands out: the customer experience. Getting customer experience (CX) right is the key to building loyalty and retaining customers. Vape retailers that deliver exceptional CX through product expertise, familiar shopping experiences, and clear messaging on available products are better positioned to foster strong brand loyalty. For vape companies, understanding how customers perceive and interact with their products in-store offers a vital opportunity to create lasting connections and stand out in a crowded market.

ALFA's research among vape retailers reveals widespread uncertainty about the upcoming regulatory changes. While 100% of retailers surveyed were aware of the impending ban, only 20% felt "moderately prepared" for its impact. The remaining 80% expressed varying levels of concern, with many admitting they had little to no clarity on what the post-June 2025 landscape might look like. Some even described themselves as "very unprepared" for the transition, highlighting a pressing need for guidance and support.¹²

As regulatory changes loom, customers will increasingly turn to trusted retailers for advice on legal and reliable alternatives—especially if their loyalty currently lies with disposable products. This creates a significant opportunity for vape brands to step up and support both retailers and their customers through these transitions. Companies that prioritise clear communication, provide educational resources, and maintain a strong presence in the convenience sector will be well-positioned to earn customer trust. In a market where brand loyalty is paramount, providing convenience retailers with essential support to deliver excellent customer experiences during this period of change could create a significant competitive advantage for vape brands.

⁷ Action on Smoking and Health (2024) "Use of vapes (e-cigarettes) among adults in Great Britain." [Online]. Available from: <https://ash.org.uk/uploads/Use-of-vapes-among-adults-in-Great-Britain-2024.pdf>

⁸ Alfa Connect Group (2025) "Vape Survey: Retail and Shop Owners". [Internally Commissioned Research].

⁹ Du, Ping., Bascom, R., Fan, T., Sinharoy, A., Yingst, J., Mondal, P., and Foulds, J. (2020) "Changes in Flavour Preference in a Cohort of Long-Term Electronic Cigarette Users" *Annals of the American Thoracic Society*. 17(5), pp.573 – 581. Available from: <https://pubmed.ncbi.nlm.nih.gov/31978316/>

¹⁰ Summary sheet: ElfBar (2023) "Creating a smokefree generation and tackling your vaping" [Online]. Available from: https://www.elfbar.co.uk/pub/media/wysiwyg/summary_elfbar.pdf

¹¹ See also reporting in mass media: The Sun (2024) (author: Elsom, J) "Own Goal: More than two million vapers could switch back to smoking cigarettes due to Government's looming crackdown, poll shows". [Online] Available from: <https://www.thesun.ie/health/14240401/vapers-could-switch-back-to-cigarettes/>

¹² Alfa Connect Group (2025) "Vape Survey: Retail and Shop Owners". [Internally Commissioned Research].

For more information about ALFA Connect Group’s research on the Vape industry, or our expertise in Customer Experience and Field Marketing, please don’t hesitate to get in touch:

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