



EU Menthol Ban Impact Analysis: Phase 1 Survey Results

A dashboard compiled by Euromonitor International for The Foundation for A Smoke-Free World, Inc.

June 2020



Dashboard overview

Scope & background

Project background

The Foundation for a Smoke-Free World would like to study the impact of the European Union's menthol ban (as stipulated by the Tobacco Products Directive) which came into effect in the EU (and UK) on 20th May 2020.

Core research objectives

Gain a clear understanding of the menthol ban's impact, including:

- *Its potential to reduce the total consumption of combustible tobacco*
- *Consumer behavior before/after the ban*
- *Company and public policy-maker communication*
- *Market reactions (prices, illicit trade, retailing, new products)*

File navigation

Screener

This section screens out respondents who do not smoke menthol cigarettes (on at least a monthly basis)

Current tobacco consumption

This section asks overall tobacco usage questions

Current menthol consumption

This section asks questions which will allow us to clarify the amount of tobacco consumed which is menthol vs. non-menthol, as well as asking questions which will allow us to segment respondents during analysis

Upcoming EU menthol ban

This section includes questions which will allow us to understand awareness and perceptions of the ban

Intended ban reaction

This section includes questions which will allow us to understand likely responses to the ban

Impact of the COVID-19 pandemic on tobacco consumption

Exploring the impact of COVID-19 on tobacco consumption

Demographics

This section will allow us to further segment respondents, which will also contribute to



Country overview

Menthol context

Current tobacco consumption: Page 1

Current tobacco consumption: Page 2

Current menthol consumption

Consumer profile

Menthol ban awareness and perception: Page 1

Menthol ban awareness and perception: Page 2

Menthol ban intended response

Impact of COVID-19: Page 1

Impact of COVID-19: Page 2

Demographics: Page 1

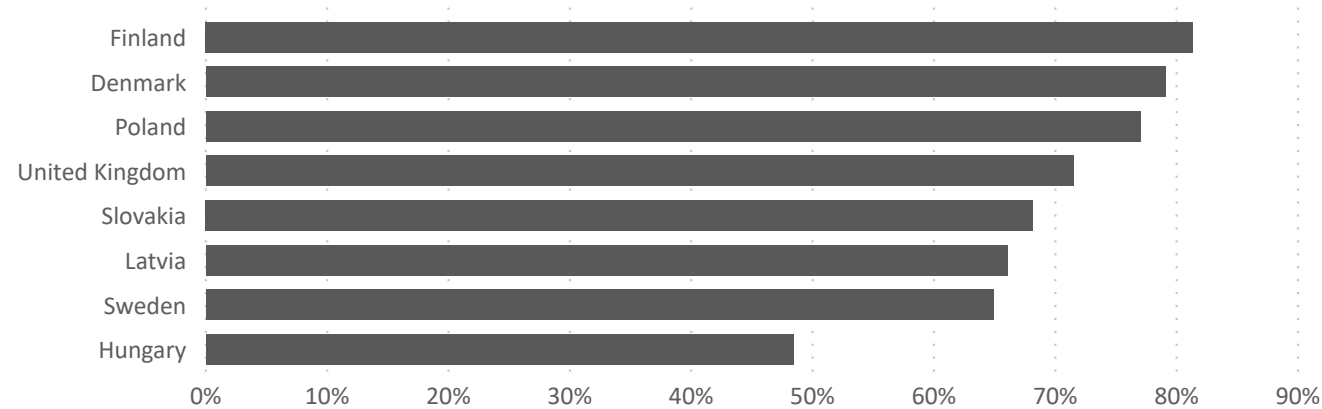
Demographics: Page 2

Demographics: Page 3

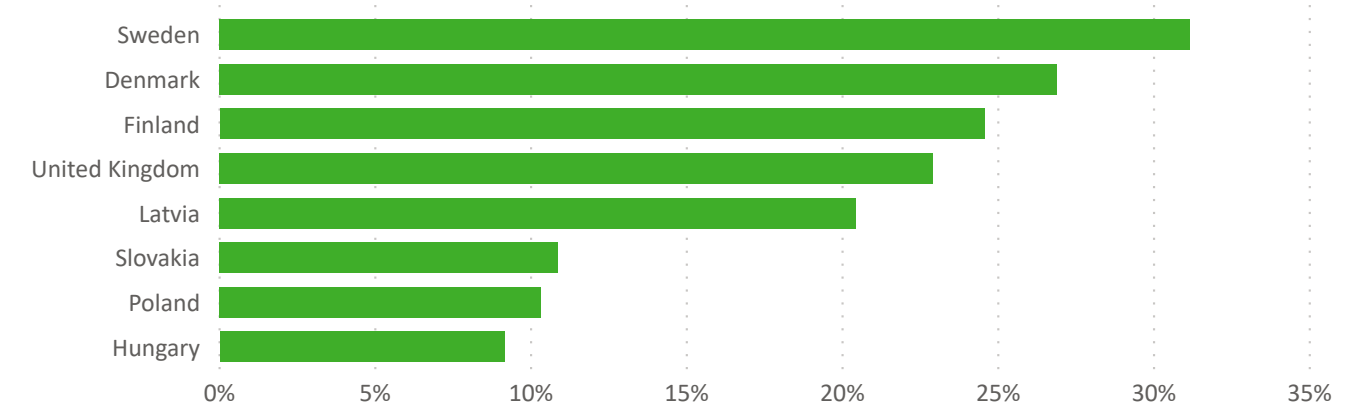
Number of respondents

6073

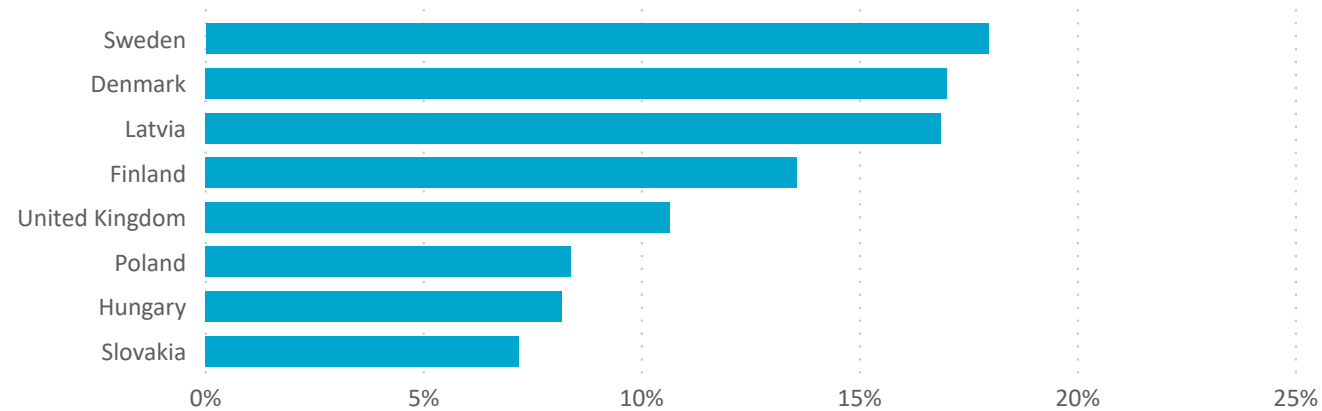
Share of respondents by country, saying "Yes", when asked whether they were aware of the upcoming ban on menthol tobacco products in the EU, starting from May 20th, 2020



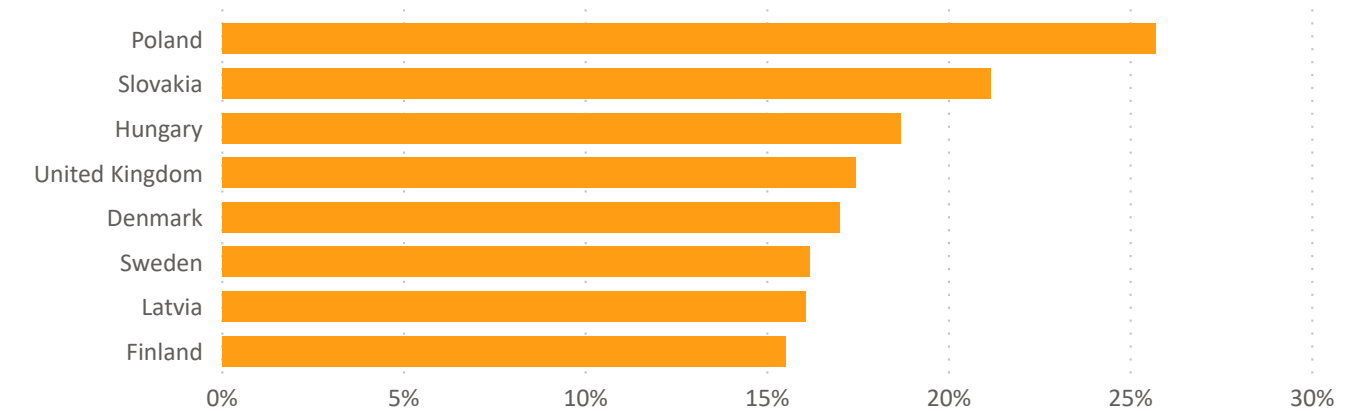
Share of respondents by country, who are either "strongly in favour" or "somewhat in favour" of the upcoming ban on menthol tobacco products in the EU, starting May 20th, 2020



Share of respondents by country, saying "I will quit smoking completely", when asked about their single most likely action as a result of the upcoming ban

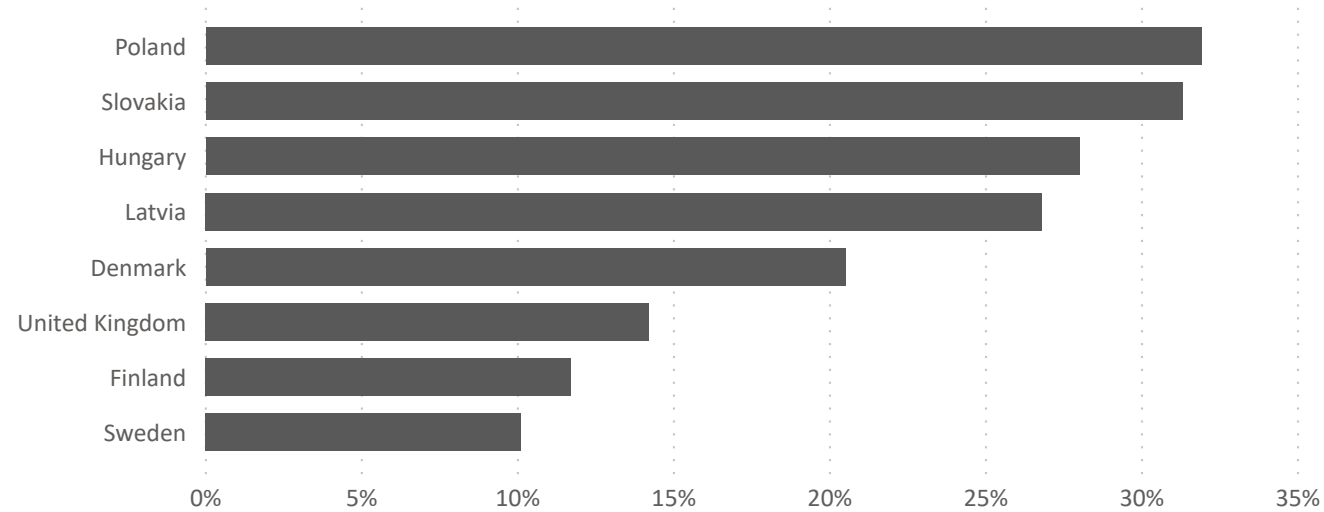


Share of respondents by country, saying "I will switch to other menthol tobacco or nicotine products", when asked about their single most likely action as a result of the upcoming ban

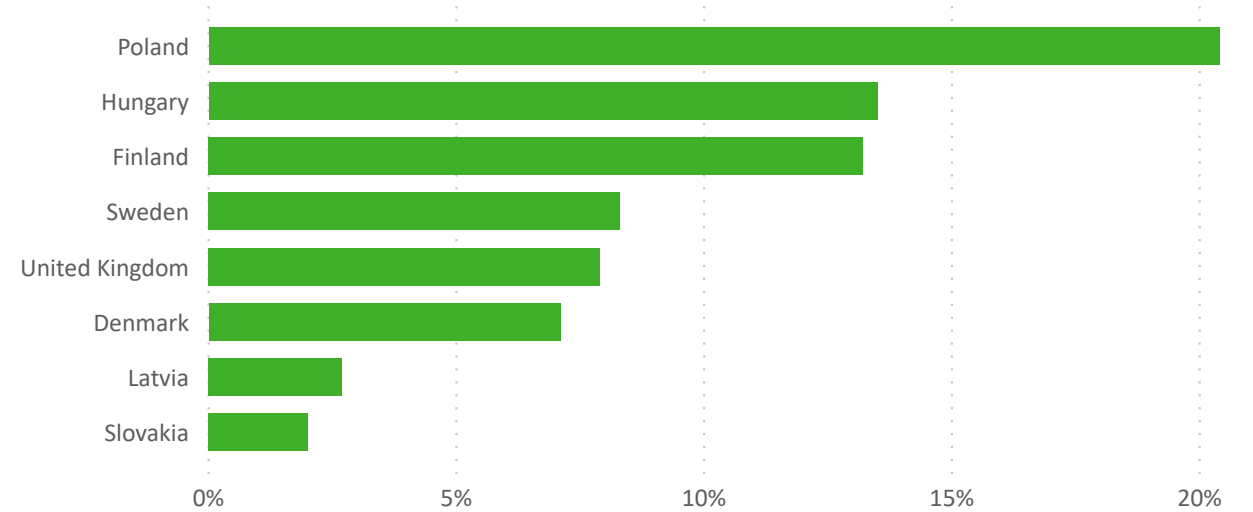


Note: To see the full list of options and intended responses, navigate to the 'Menthol ban intended response' tab and expand the first chart at the top

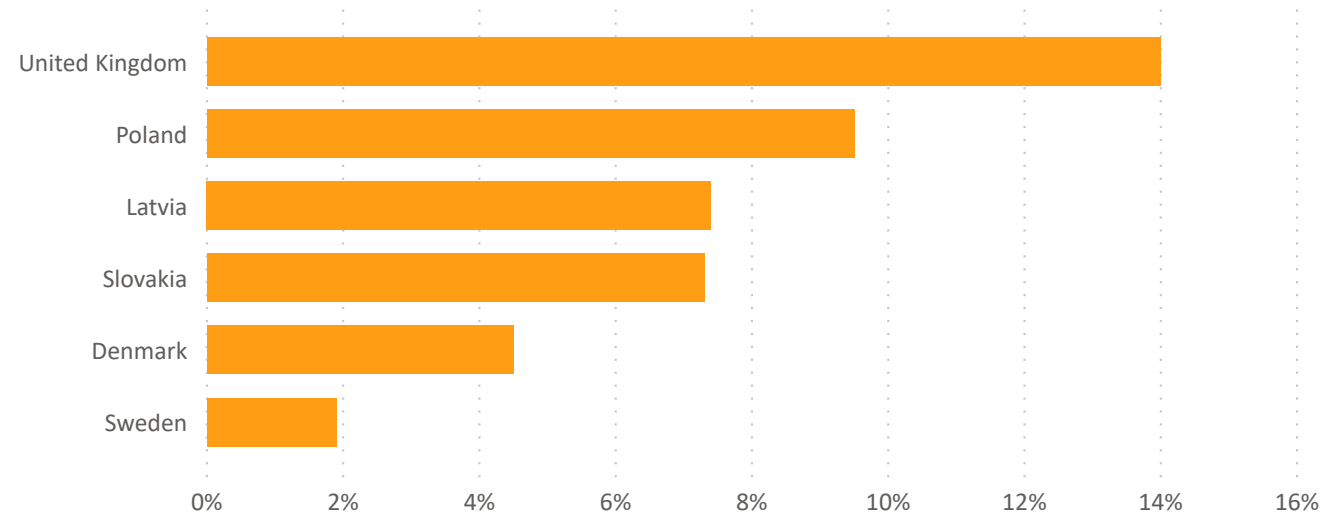
Smoking prevalence per country, 2019



Share of menthol cigarettes per market, 2019



Share of capsule cigarettes per market, 2019



Current tobacco consumption

[Menu](#)

Select: Country

All

Select: Gender

All

Select: Age

All

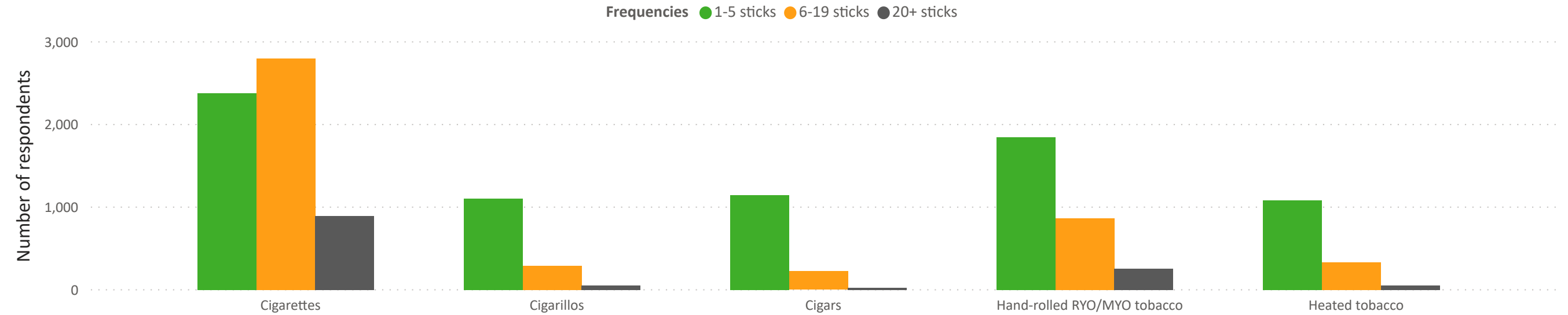
Select: Frequency

All

Number of respondents

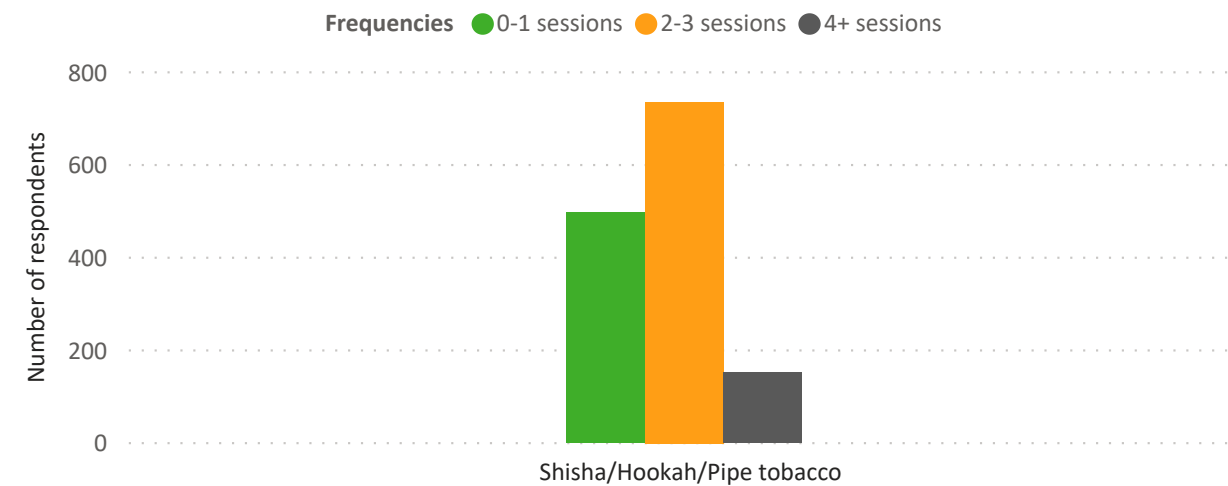
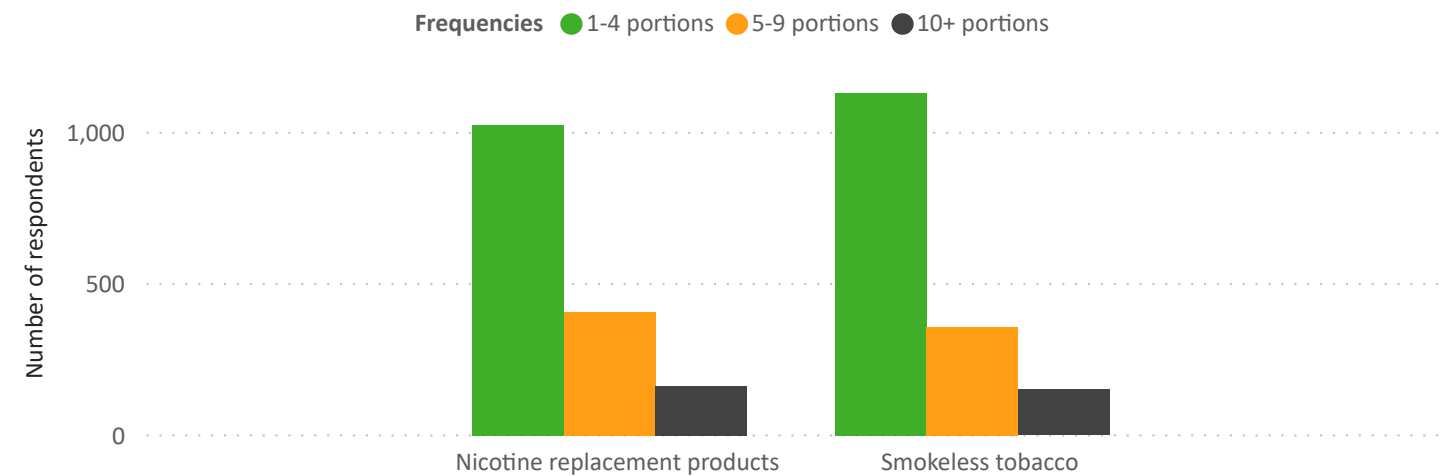
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How many of each of the following product types do you typically consume? (Based on chosen frequency)



How many portions of each of the following products do you typically consume? (Based on chosen frequency)

How many sessions of consuming Shisha/Hookah/Pipe tobacco do you typically have? (Based on chosen frequency)



Current tobacco consumption

Select: Country

All

▼

Select: Gender

All

▼

Select: Age

All

▼

Select: Frequency

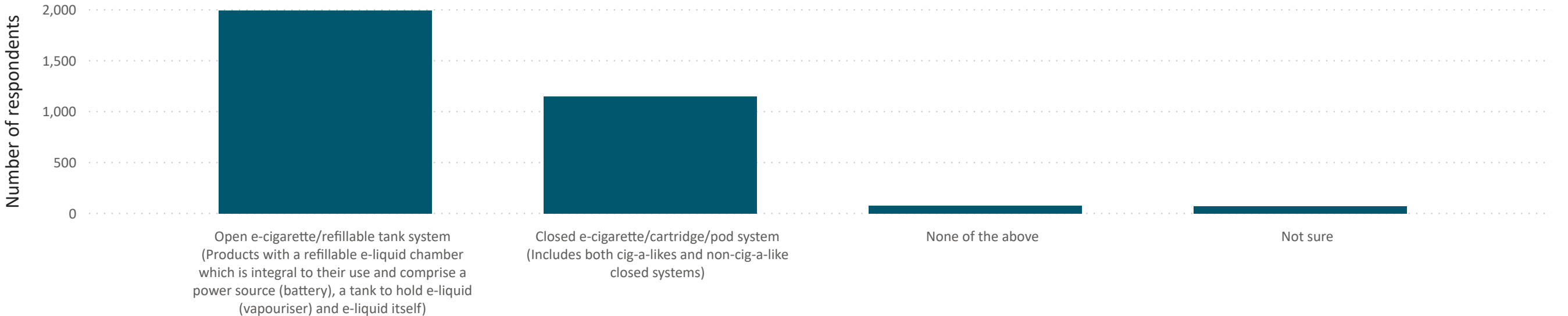
All

▼

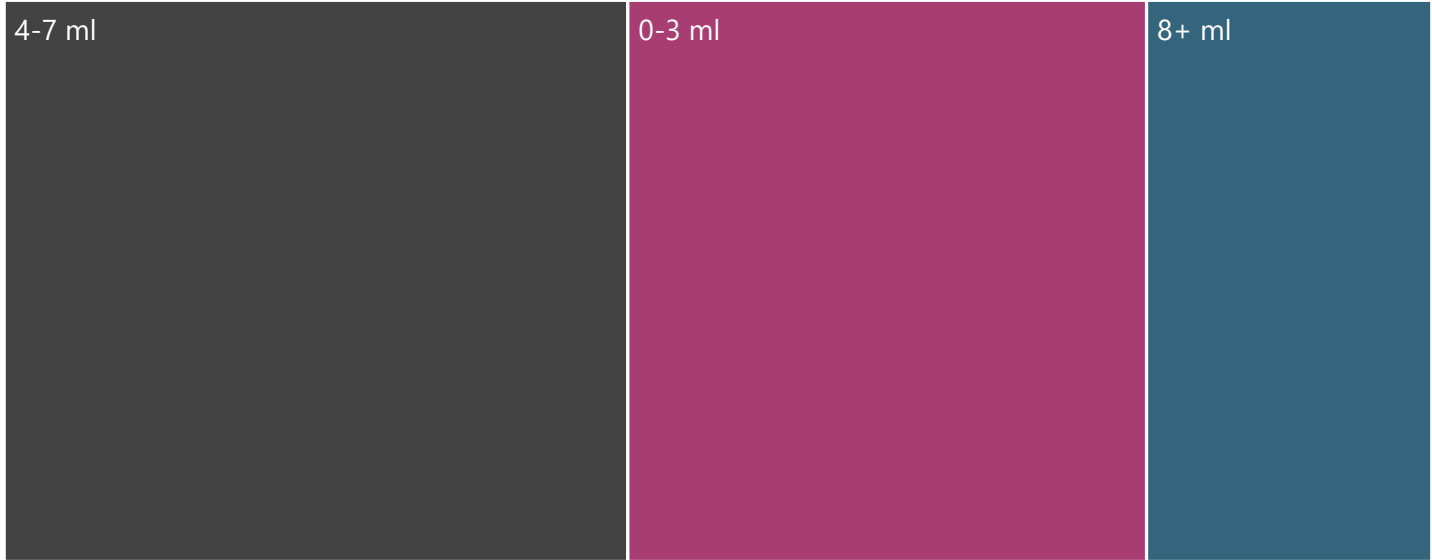
Number of respondents

6073

You said you consume e-cigarettes (based on chosen frequency). Which of the following types of e-cigarettes do you typically consume?



How many open system e-cigarettes do you typically consume (based on chosen frequency)?



How many pods or refills of closed system e-cigarettes do you typically consume (based on chosen frequency)?



Current menthol consumption

Select: Country

All

▼

Select: Gender

All

▼

Select: Age

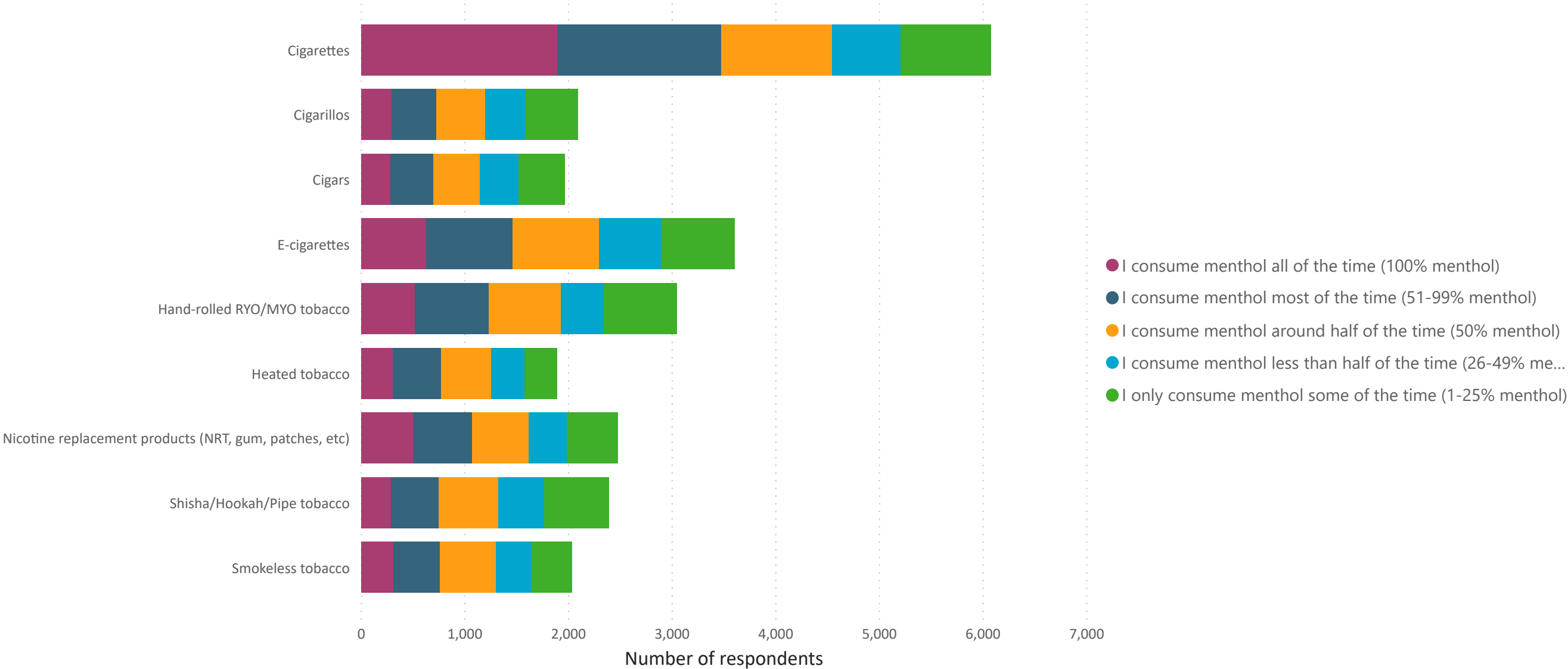
All

▼

Number of respondents

6073

Respondents by how much of their current tobacco consumption is menthol, versus non-menthol



Select: Country

All

Select: Gender

All

Select: Age

All

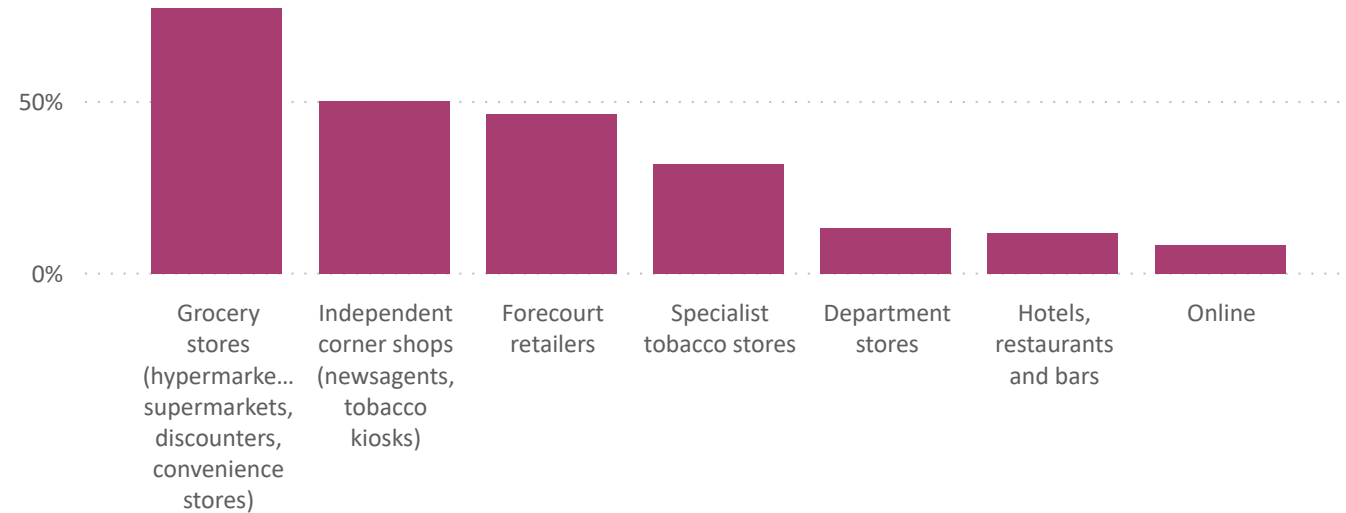
Select: Choice of tobacco product

All

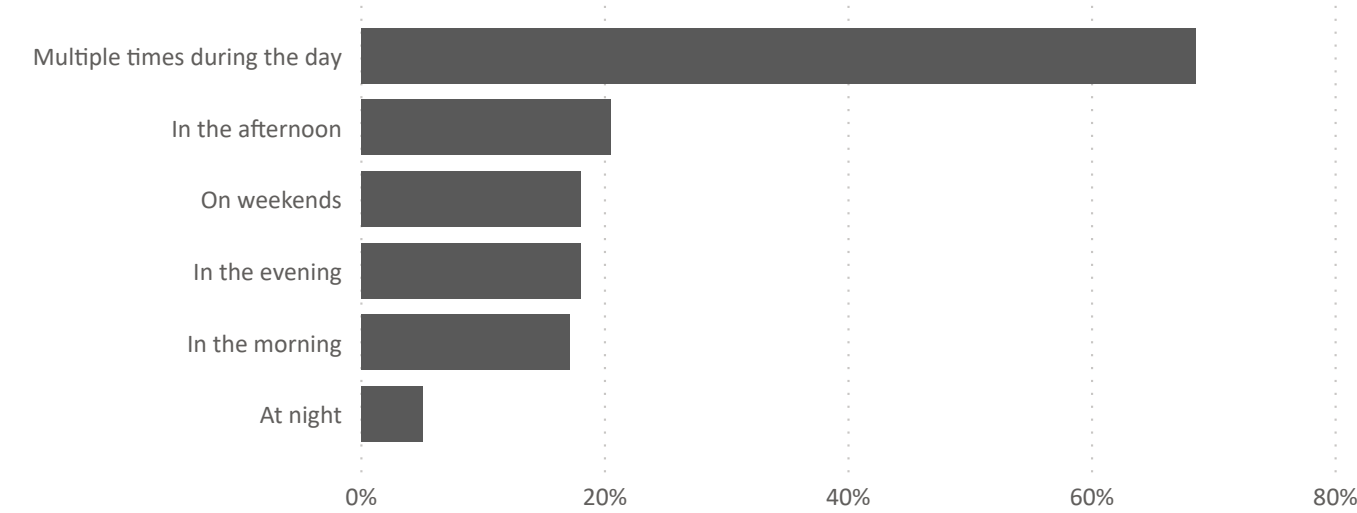
Number of respondents

6073

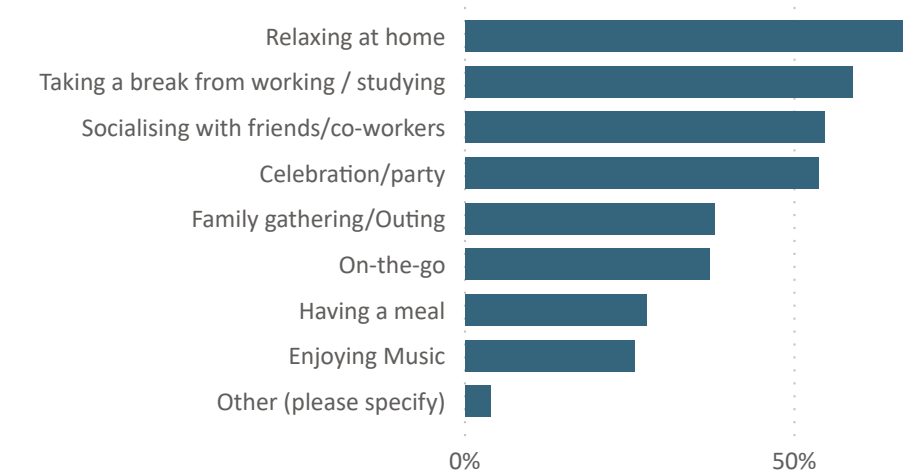
Where do you usually purchase your tobacco or nicotine products from?



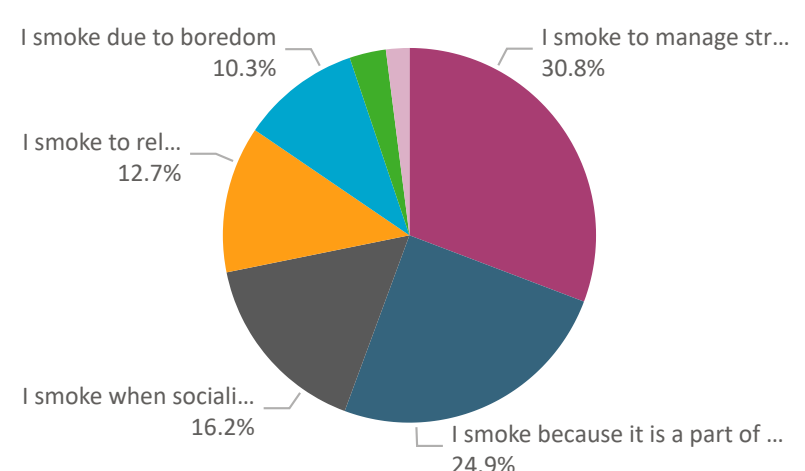
When do you usually consume tobacco or nicotine products?



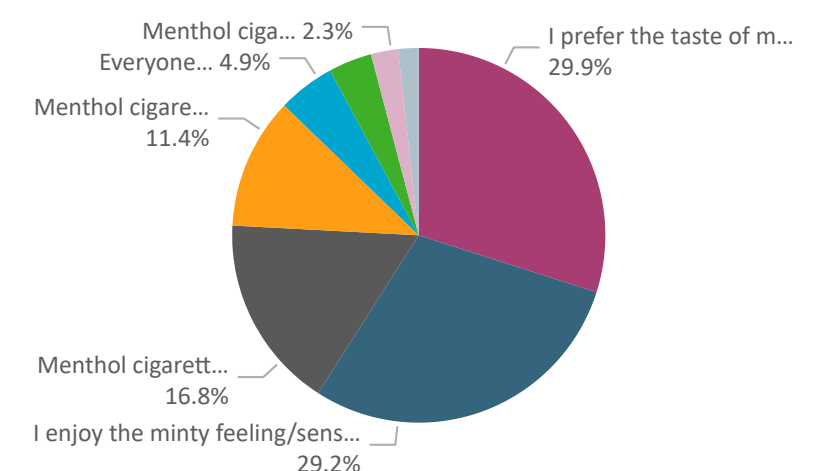
On what occasions do you usually consume tobacco or nicotine products?



Please select the one statement which best reflects why you consume cigarettes.



Which of the following statements best reflect why you consume menthol cigarettes?



Menthol ban awareness and perception

[Menu](#)

Select: Country

All

Select: Gender

All

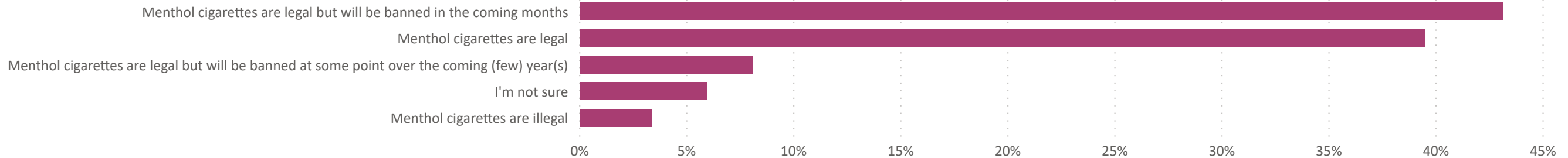
Select: Age

All

Number of respondents

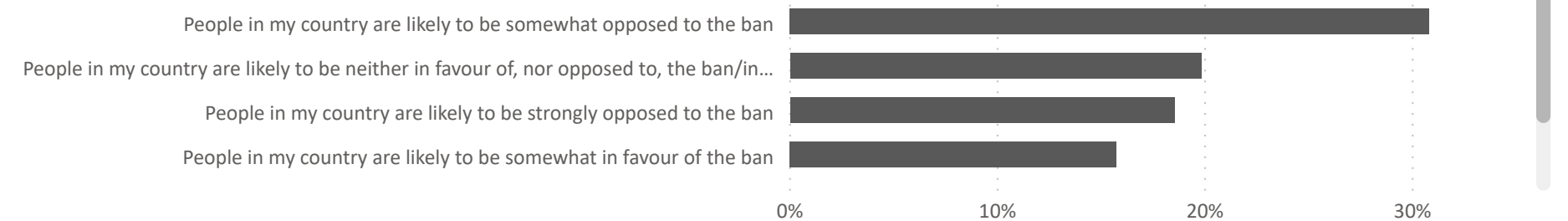
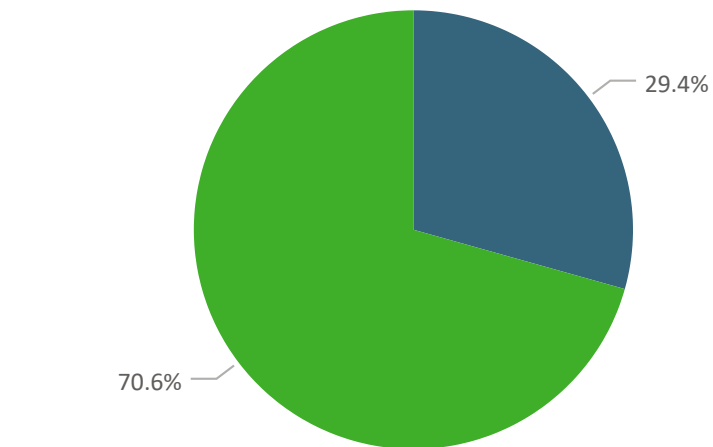
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What is the current status of menthol cigarettes in your country?

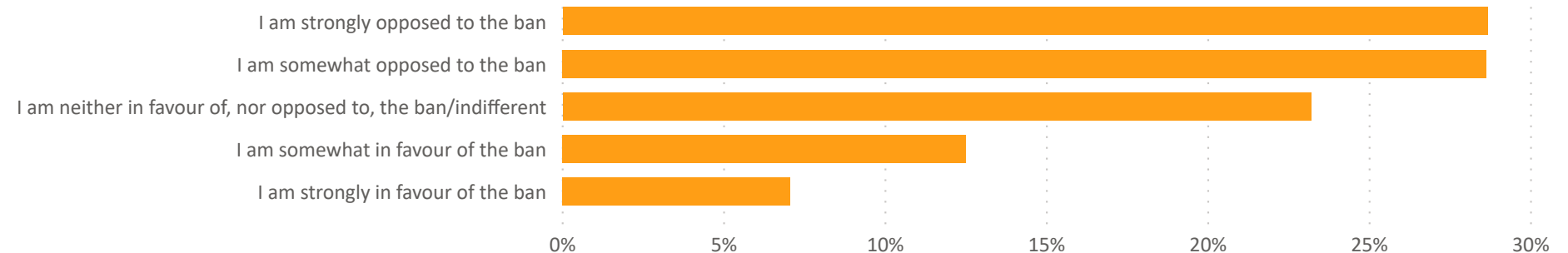


As stipulated by EU legislation, menthol cigarettes and hand-rolled tobacco products will be banned on May 20th, 2020. Were you aware of this upcoming ban?

How do you think that people in your country will react to the ban? Please think about people's overall perception, even if this differs from your own.



Which of the below statements best describes your own stance on the upcoming ban on menthol cigarettes?



● No – I was not aware of the upcoming ban
 ● Yes – I was aware of the upcoming ban

Menthol ban awareness and perception

[Menu](#)

Select: Country

All

Select: Gender

All

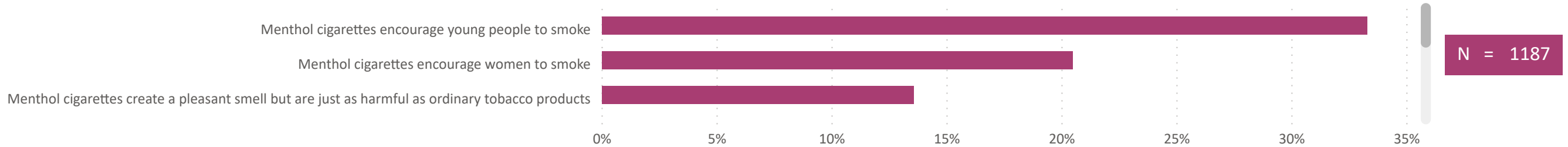
Select: Age

All

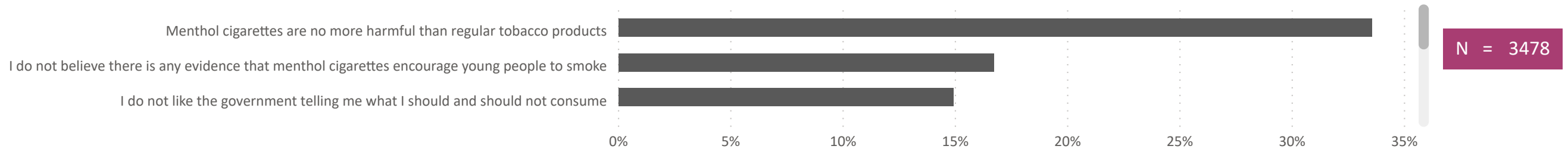
Number of respondents

6073

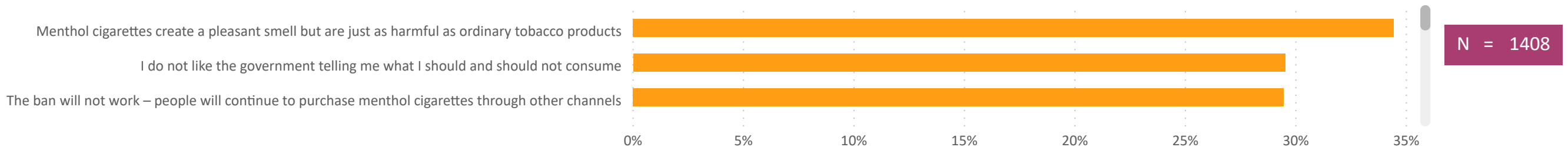
You said you were {"strongly in favour" / "somewhat in favour"} of the upcoming ban on menthol cigarettes. Which of the following best describes your main reason for supporting the ban?



You said you were {"strongly opposed" / "somewhat opposed"} to the upcoming ban on menthol cigarettes. Which of the following best describes your main reason for being opposed to the ban?



You said you were neither in favour of, nor opposed to, the upcoming ban on menthol cigarettes. Which, if any, of the following statements do you agree with? Please select all that apply



Menthol ban intended response

[Menu](#)

Select: Country

Select: Gender

Select: Age

Number of respondents

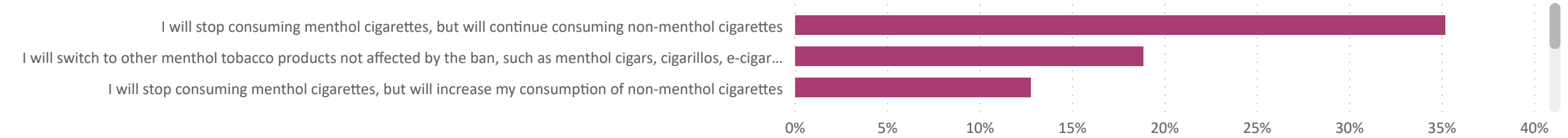
All

All

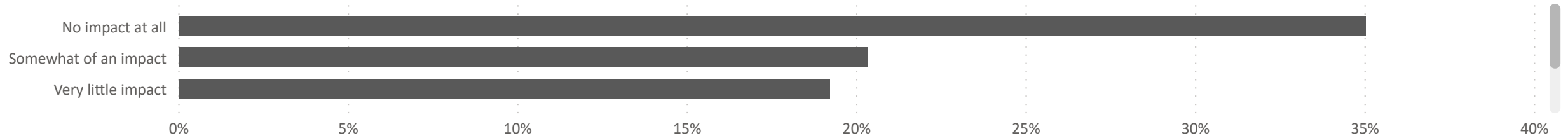
All

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What single action are you most likely to take as a result of the upcoming ban on menthol cigarettes?

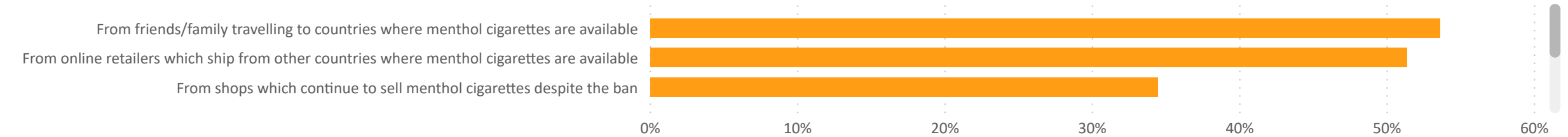


You said you plan to quit smoking completely as a result of the upcoming ban. How much of an impact has the recent Covid-19 pandemic had on your decision?



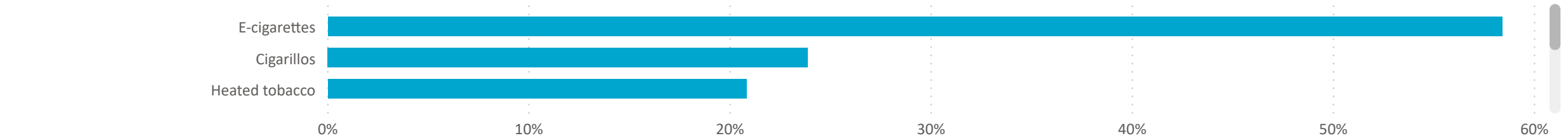
N = 708

You said you intend to start buying menthol cigarettes from other sources after the ban. Which of the following best describes where you intend to buy from after the ban?



N = 752

You said you intend to switch to other menthol tobacco or nicotine products not affected by the ban. Which of the following products do you intend to switch to after the ban?



N = 1144

Select: Country

Select: Gender

Select: Age

Number of respondents

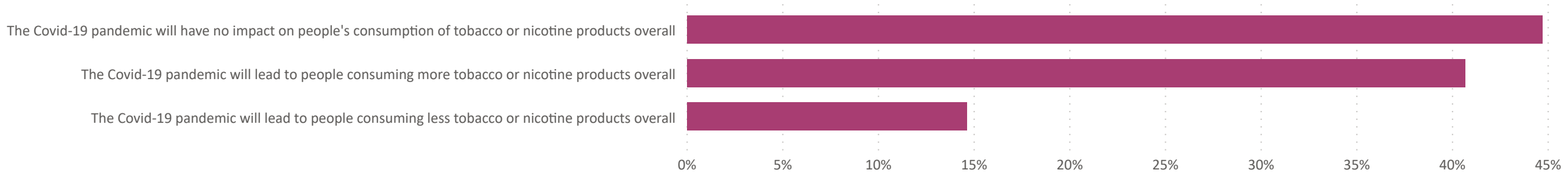
All

All

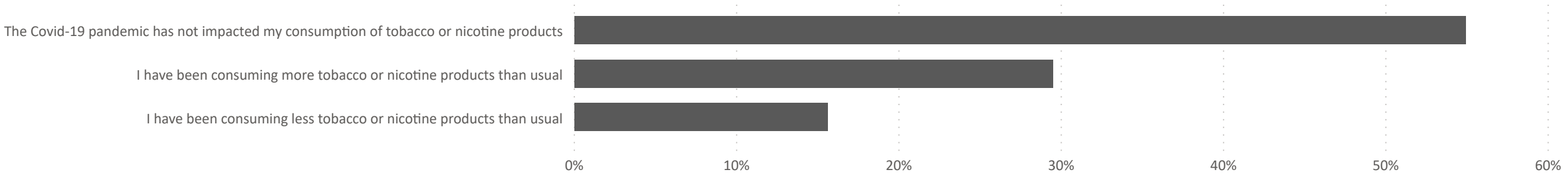
All

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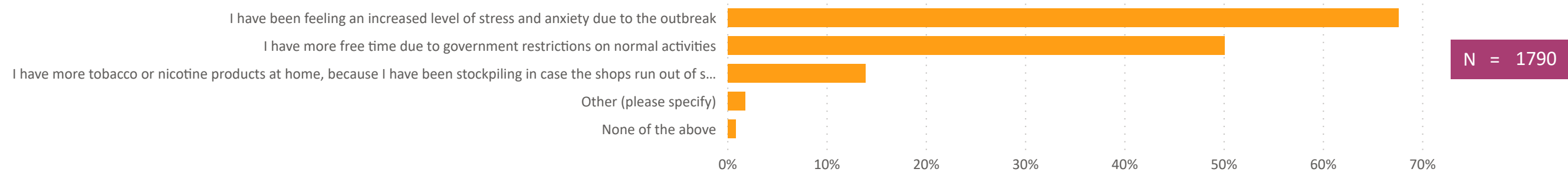
How do you think that the Covid-19 pandemic will impact consumption of tobacco or nicotine products in your country overall?



How has the Covid-19 pandemic in your country impacted your own consumption of tobacco or nicotine products?



You said you have been consuming more tobacco or nicotine products than usual during the Covid-19 pandemic. Which of the following best describes why?



Select: Country

All

Select: Gender

All

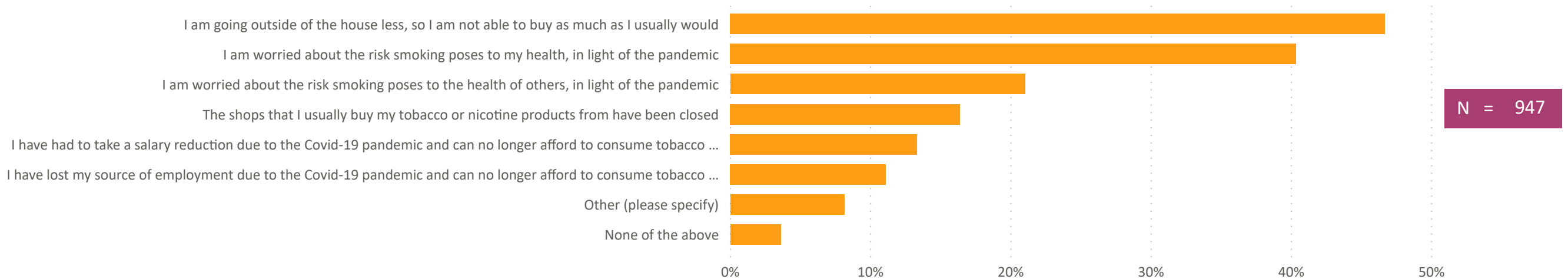
Select: Age

All

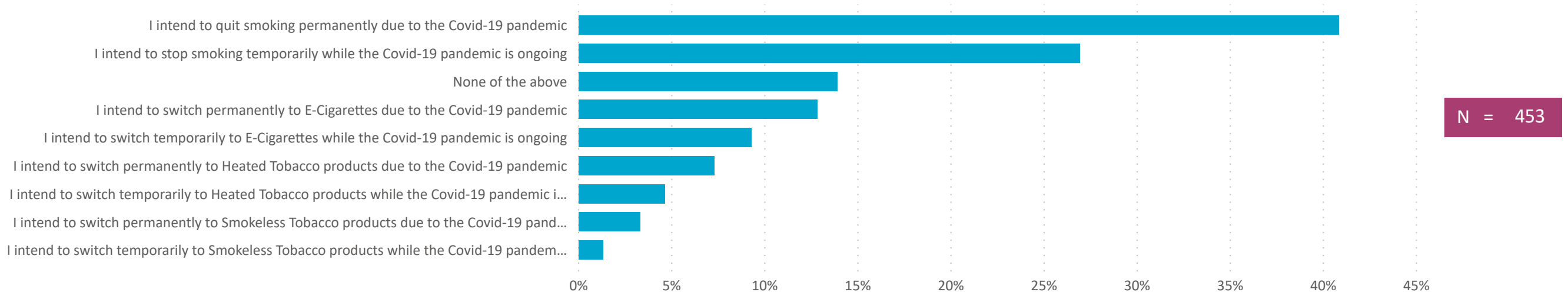
Number of respondents

6073

You said you have been consuming less tobacco or nicotine products than usual during the Covid-19 pandemic. Which of the following best describes why?



You said that you are worried about the risk smoking poses to your health / to the health of others, in light of the Covid-19 pandemic. Which of the following statements, if any, apply to you?



Select: Country

Select: Gender

Select: Age

Number of respondents

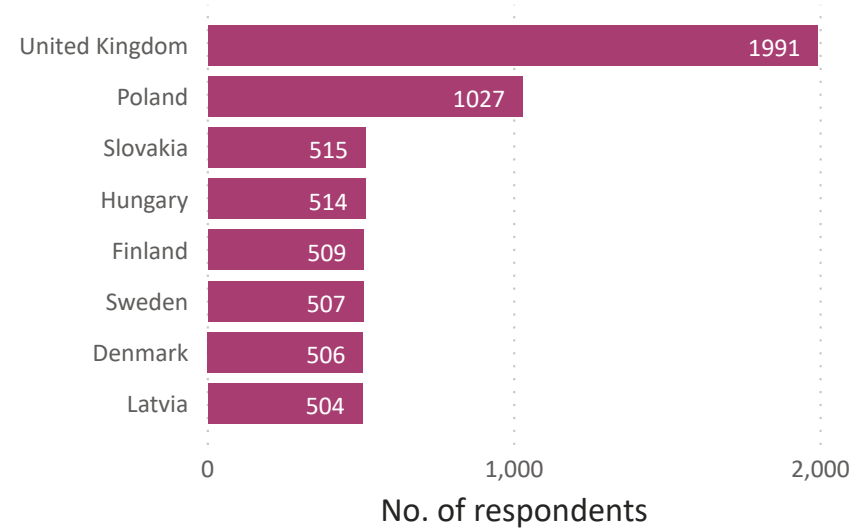
All

All

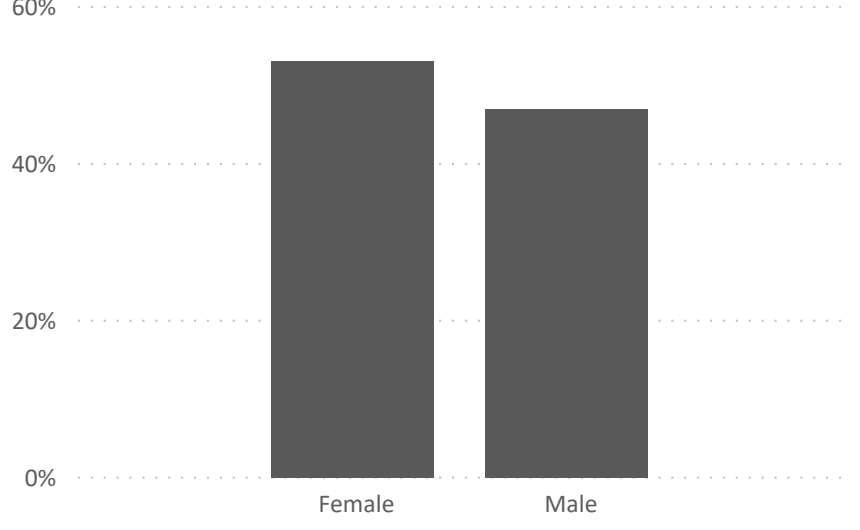
All

6073

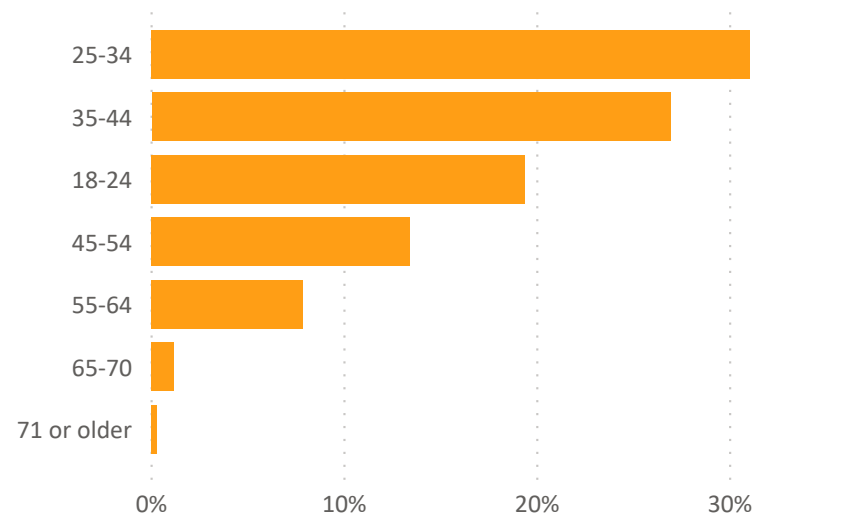
Respondents by country of residence



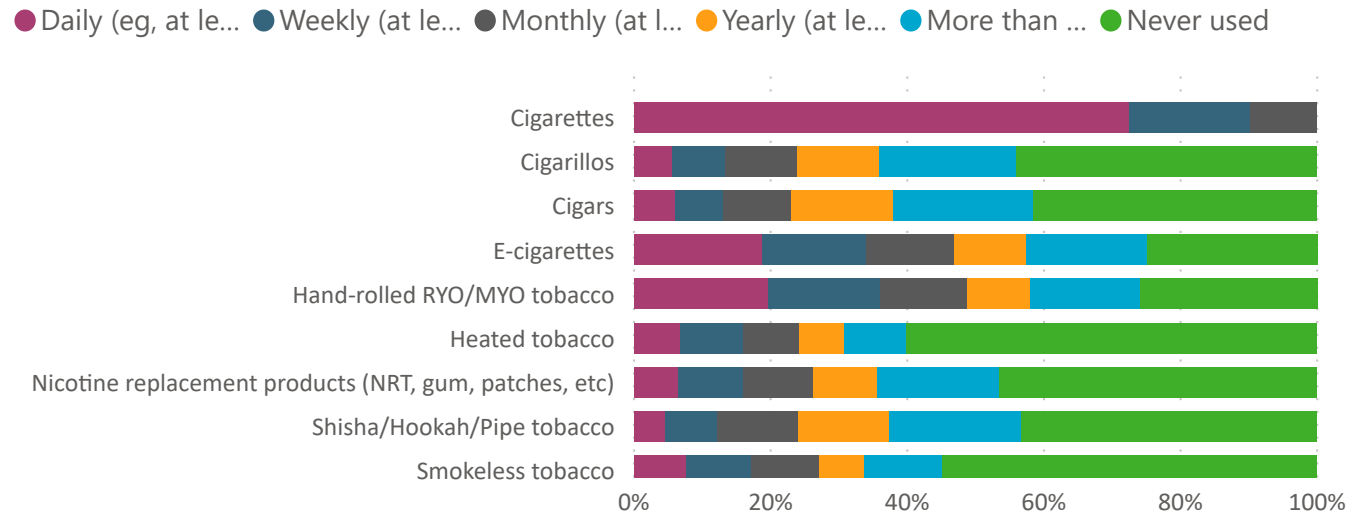
Respondents by gender



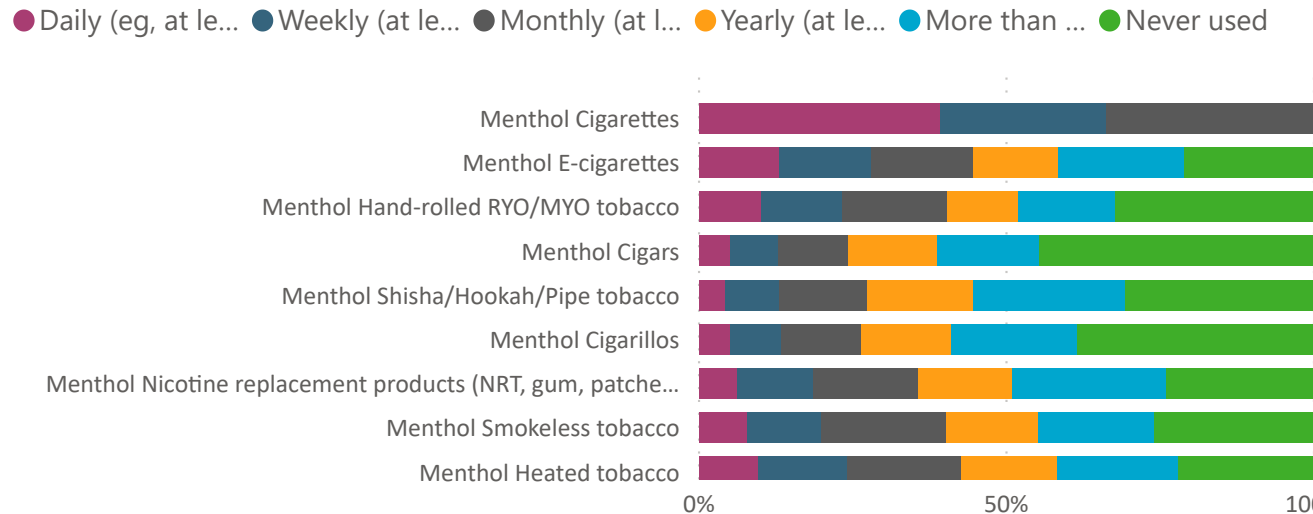
Respondents by age



How frequently do you consume each of the following products?



How frequently do you consume each of the following menthol products?



Select: Country

Select: Gender

Select: Age

Number of respondents

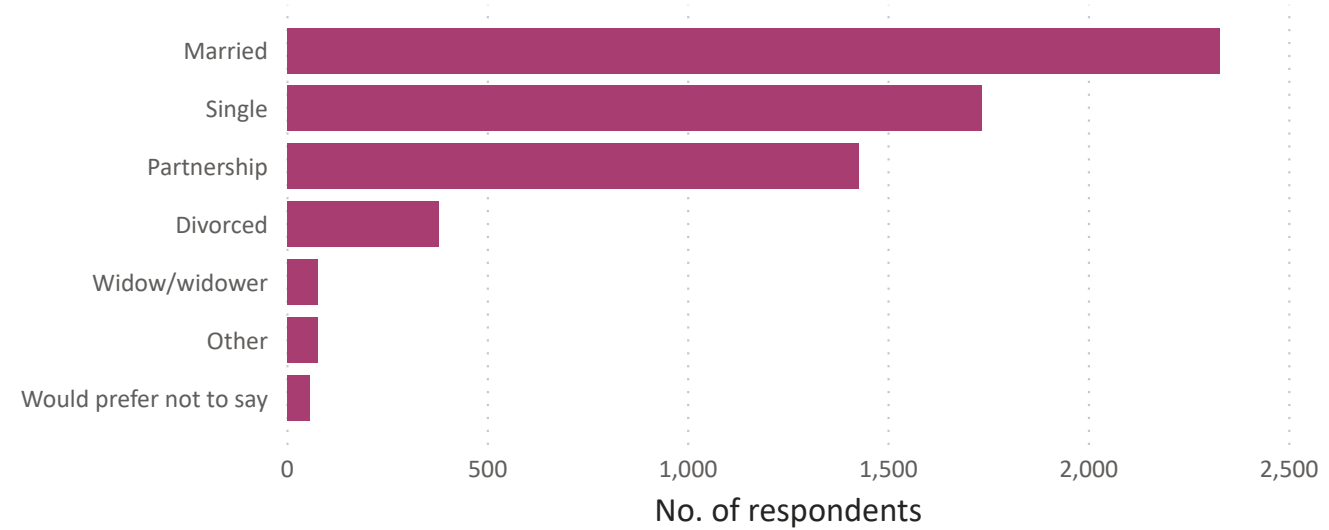
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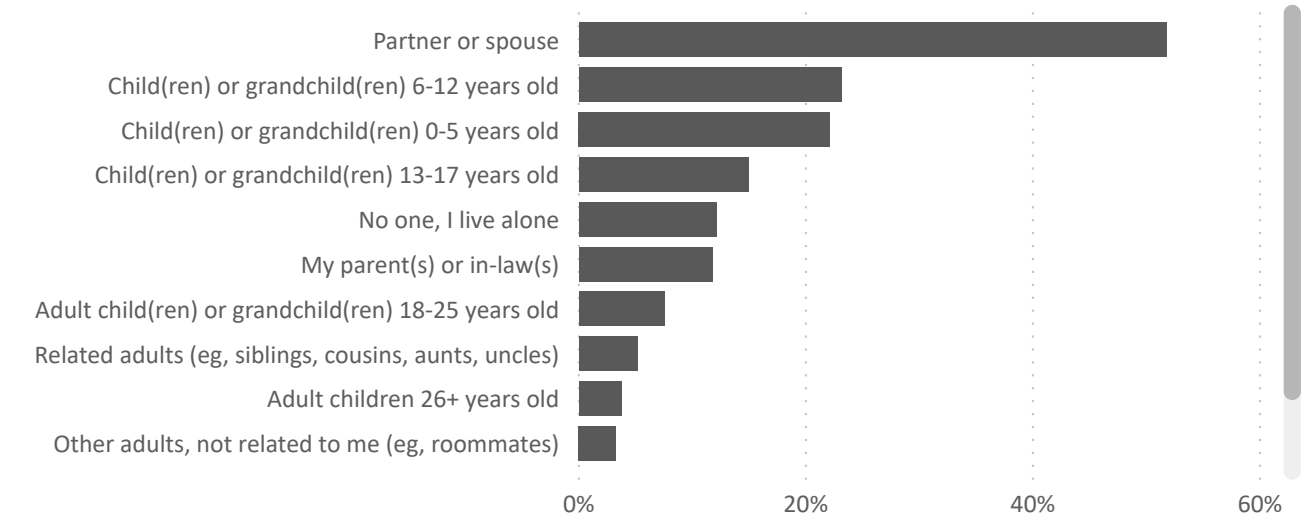
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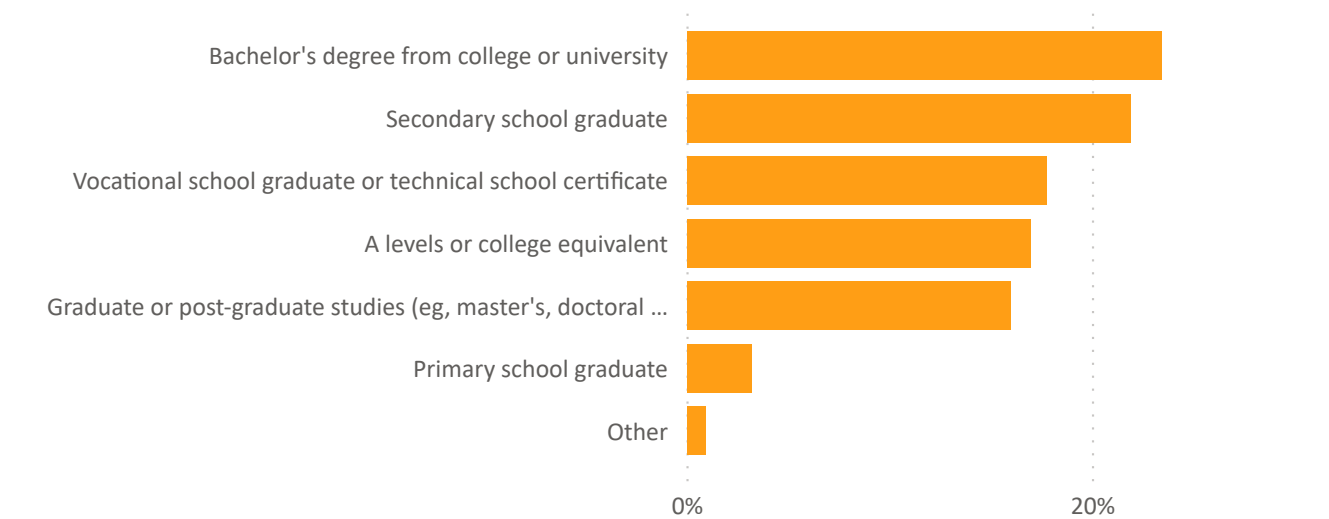
Respondents by current marital status



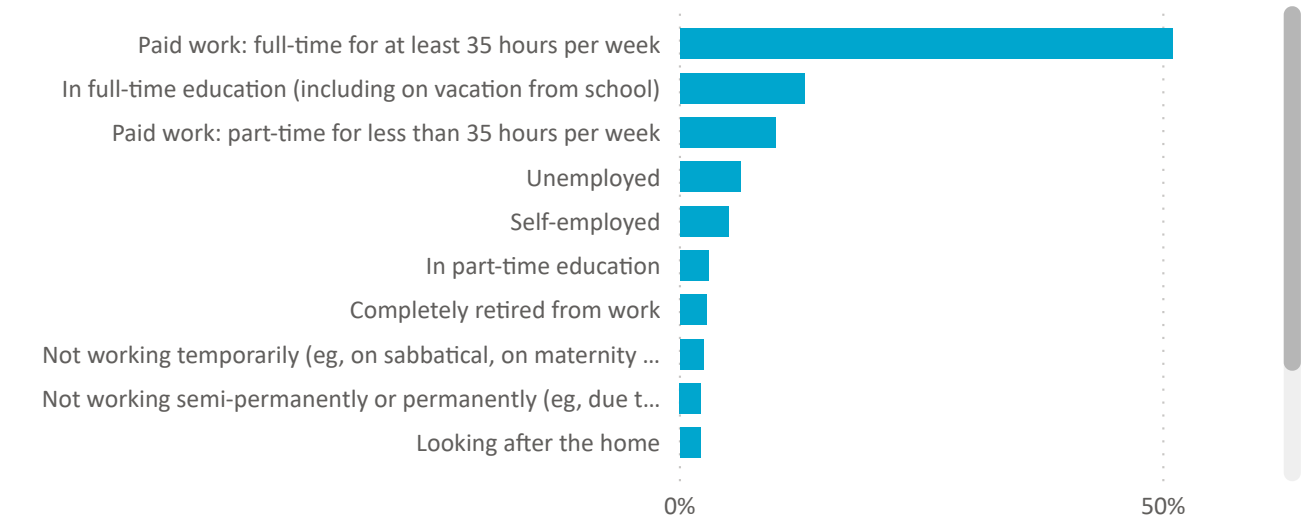
Who else lives in your household full-time?



Respondents by highest level of education



Respondents by primary work status



Select: Country

All

Select: Gender

All

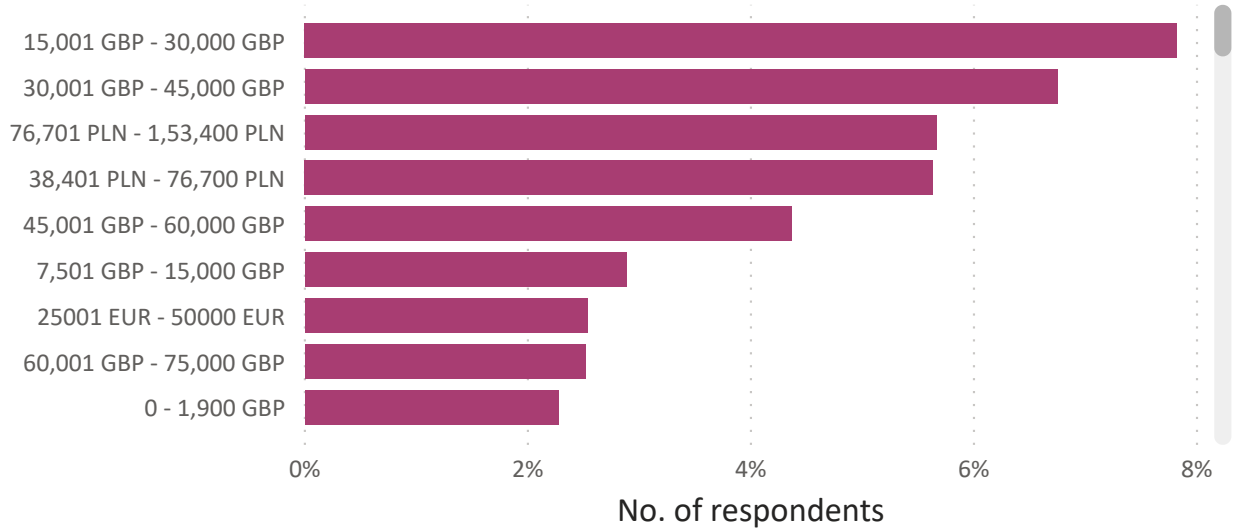
Select: Age

All

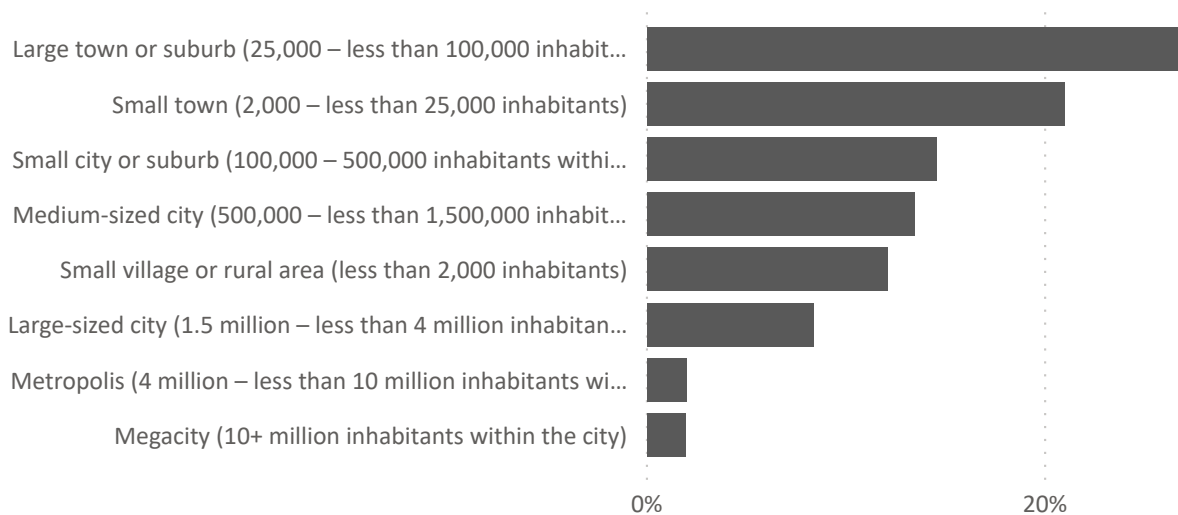
Number of respondents

6073

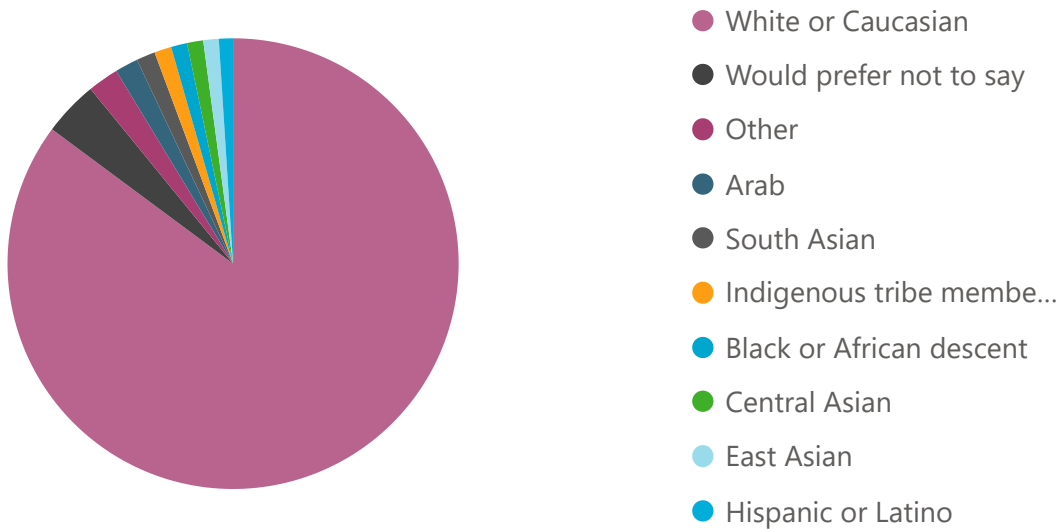
Respondents by household's total annual income



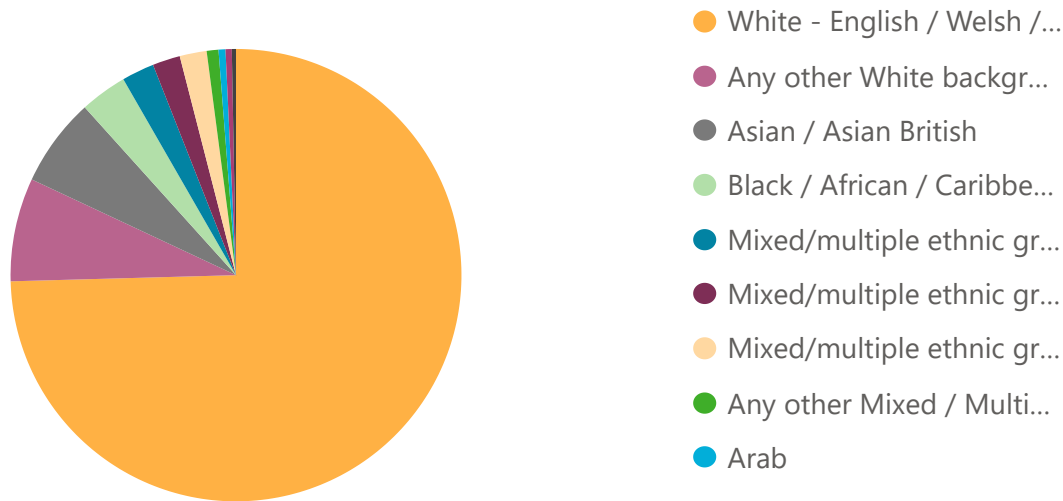
Which best describes where you currently live?



Respondents by race and/or ethnicity (except United Kingdom)



Respondents by race and/or ethnicity (United Kingdom)





Contact Details

Amir Ali

Associate Consultant/Global Project Manager

Amir.Ali@euromonitor.com

+44 (0)20 7251 8024 ext. 3784

London

Rajarshi Bahubalindra

Senior Global Market Analyst

Rajarshi.B@euromonitor.com

+91 (80) 67740500 ext. 5518

Bangalore

Sagarika Bharadwaj

Consulting Manager

Sagarika.Bharadwaj@euromonitor.com

+91 (80) 67740500

Bangalore

Stefano Di Napoli

Senior Consultant/Senior Support

Stefano.DiNapoli@euromonitor.com

+44 (0)20 7251 8024

London

Stefan J. Medina

Director for International Development

Stefan.Medina@euromonitor.com

+1 (312) 922 1115

Chicago

Blake Johnson

Senior Business Development

Blake.Johnson@euromonitor.com

+1 (312) 922 1115

Chicago

