EU Menthol Ban Impact Analysis: Phase 1 (Pre-ban) Survey Results

June 2020
The Foundation for a Smoke-Free World has commissioned a study to understand 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)

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 segmentation/profiling analysis

Survey source: Euromonitor International June 2020
Country overview

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

- Finland
- Denmark
- Poland
- United Kingdom
- Slovakia
- Latvia
- Sweden
- Hungary

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

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

- Sweden
- Denmark
- Finland
- United Kingdom
- Latvia
- Slovakia
- Poland
- Hungary

0% 5% 10% 15% 20% 25% 30% 35%

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

- Sweden
- Denmark
- Latvia
- Finland
- United Kingdom
- Poland
- Hungary
- Slovakia

0% 5% 10% 15% 20% 25% 30% 35%

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

- Poland
- Slovakia
- Hungary
- United Kingdom
- Denmark
- Sweden
- Latvia
- Finland

0% 5% 10% 15% 20% 25% 30% 35%

Survey source: Euromonitor International June 2020
Menthol context

Smoking prevalence per country, 2019

- Poland
- Slovakia
- Hungary
- Latvia
- Denmark
- United Kingdom
- Finland
- Sweden

Share of menthol cigarettes per market, 2019

- Poland
- Hungary
- Finland
- Sweden
- United Kingdom
- Denmark
- Latvia
- Slovakia

Share of capsule cigarettes per market, 2019

- United Kingdom
- Poland
- Latvia
- Slovakia
- Denmark
- Sweden

Source: Euromonitor Passport database, June 2020
Current tobacco consumption

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

- Cigarettes
- Cigarillos
- Cigars
- Hand-rolled RYO/MYO tobacco
- Heated tobacco

Number of respondents: 6073

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

- Nicotine replacement products
- Smokeless tobacco

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

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

- Open e-cigarette/refillable tank system (Products with a refillable e-liquid chamber which is integral to their use and comprise a power source (battery), a tank to hold e-liquid (vapouriser) and e-liquid itself)
- Closed e-cigarette/cartridge/pod system (Includes both cig-a-likes and non-cig-a-like closed systems)
- None of the above
- Not sure

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

- 4-7 ml
- 0-3 ml
- 8+ ml

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

- 0-2 pods
- 3-4 pods
- 5+ pods

Number of respondents: 6073
Current menthol consumption

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

Survey source: Euromonitor International June 2020
**Consumer profile**

**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?**

- Grocery stores (hypermarkets, supermarkets, discounters, convenience stores)
- Independent corner shops (newsagents, tobacco kiosks)
- Forecourt retailers
- Specialist tobacco stores
- Department stores
- Hotels, restaurants and bars
- Online

**When do you usually consume tobacco or nicotine products?**

- Multiple times during the day
- In the afternoon
- On weekends
- In the evening
- In the morning
- At night

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

- Relaxing at home
- Taking a break from working/studying
- Socialising with friends/co-workers
- Celebration/party
- Family gathering/Outing
- On the-go
- Having a meal
- Enjoying Music
- Other (please specify)

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

- I smoke due to boredom
- I smoke to manage stress
- I smoke to relax
- I smoke when socialising
- I smoke because it is a part of socialising
- I smoke to enjoy music
- Everyone else around me

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

- I prefer the taste of menthol
- I enjoy the minty feeling/sensation
- Menthol cigarettes fit better
- I smoke because it is a part of socialising
- Everyone else around me
- I enjoy the minty feeling/sensation

**Number of respondents**: 6073
### Menthol ban awareness and perception

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

<table>
<thead>
<tr>
<th>Status</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Menthol cigarettes are legal but will be banned in the coming months</td>
<td>45%</td>
</tr>
<tr>
<td>Menthol cigarettes are legal</td>
<td>20%</td>
</tr>
<tr>
<td>Menthol cigarettes are legal but will be banned at some point over the coming (few) year(s)</td>
<td>15%</td>
</tr>
<tr>
<td>I’m not sure</td>
<td>10%</td>
</tr>
<tr>
<td>Menthol cigarettes are illegal</td>
<td>5%</td>
</tr>
</tbody>
</table>

**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?**

<table>
<thead>
<tr>
<th>Awareness</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No – I was not aware of the upcoming ban</td>
<td>29.4%</td>
</tr>
<tr>
<td>Yes – I was aware of the ban</td>
<td>70.6%</td>
</tr>
</tbody>
</table>

**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.**

<table>
<thead>
<tr>
<th>Reaction</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>People in my country are likely to be strongly opposed to the ban</td>
<td>20%</td>
</tr>
<tr>
<td>People in my country are likely to be somewhat opposed to the ban</td>
<td>25%</td>
</tr>
<tr>
<td>People in my country are likely to be neither in favour of, nor opposed to, the ban/indifferent</td>
<td>20%</td>
</tr>
<tr>
<td>People in my country are likely to be strongly in favour of the ban</td>
<td>15%</td>
</tr>
<tr>
<td>People in my country are likely to be somewhat in favour of the ban</td>
<td>10%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Stance</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am strongly opposed to the ban</td>
<td>30%</td>
</tr>
<tr>
<td>I am somewhat opposed to the ban</td>
<td>25%</td>
</tr>
<tr>
<td>I am neither in favour of, nor opposed to, the ban/indifferent</td>
<td>20%</td>
</tr>
<tr>
<td>I am somewhat in favour of the ban</td>
<td>15%</td>
</tr>
<tr>
<td>I am strongly in favour of the ban</td>
<td>10%</td>
</tr>
</tbody>
</table>

Number of respondents: 6073
Menthol ban awareness and perception

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?

- Menthol cigarettes encourage young people to smoke
- Menthol cigarettes encourage women to smoke
- Menthol cigarettes create a pleasant smell but are just as harmful as ordinary tobacco products
- Menthol cigarettes are more addictive than ordinary tobacco products

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?

- Menthol cigarettes are no more harmful than regular tobacco products
- I do not believe there is any evidence that menthol cigarettes encourage young people to smoke
- I do not like the government telling me what I should and should not consume
- The ban will not work – people will continue to purchase menthol cigarettes through other channels

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 cigarettes create a pleasant smell but are just as harmful as ordinary tobacco products
- I do not like the government telling me what I should and should not consume
- The ban will not work – people will continue to purchase menthol cigarettes through other channels
- I do not believe there is any evidence that menthol cigarettes encourage young people to smoke

Survey source: Euromonitor International June 2020
What single action are you most likely to take as a result of the upcoming ban on menthol cigarettes?

- I will stop consuming menthol cigarettes, but will continue consuming non-menthol cigarettes
- I will stop consuming menthol cigarettes, but will increase my consumption of non-menthol cigarettes
- I will switch to other menthol tobacco products not affected by the ban, such as menthol cigars, cigarillos, e-cigar…

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?

- From friends/family travelling to countries where menthol cigarettes are available
- From online retailers which ship from other countries where menthol cigarettes are available
- From shops which continue to sell menthol cigarettes despite the ban

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?

- E-cigarettes
- Cigarillos
- Heated tobacco

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Number of respondents:

- Total respondents: 6073
- Country: 6073
- Gender: 6073
- Age: 6073

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Impact of Covid-19 pandemic on quitting decision:

- No impact at all
- Somewhat of an impact
- Very little impact

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Products to switch to after the ban:

- E-cigarettes
- Cigarillos
- Heated tobacco
Impact of COVID-19

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

- The Covid-19 pandemic will have no impact on people’s consumption of tobacco or nicotine products overall
- The Covid-19 pandemic will lead to people consuming more tobacco or nicotine products overall
- The Covid-19 pandemic will lead to people consuming less tobacco or nicotine products overall

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

- The Covid-19 pandemic has not impacted my consumption of tobacco or nicotine products
- I have been consuming more tobacco or nicotine products than usual
- I have been consuming less tobacco or nicotine products than usual

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?

- I have been feeling an increased level of stress and anxiety due to the outbreak
- I have more free time due to government restrictions on normal activities
- I have more tobacco or nicotine products at home, because I have been stockpiling in case the shops run out of...
- Other (please specify)
- None of the above

Survey source: Euromonitor International June 2020
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?

- I am going outside of the house less, so I am not able to buy as much as I usually would
- I am worried about the risk smoking poses to my health, in light of the pandemic
- I am worried about the risk smoking poses to the health of others, in light of the pandemic
- The shops that I usually buy my tobacco or nicotine products from have been closed
- I have had to take a salary reduction due to the Covid-19 pandemic and can no longer afford to consume tobacco...
- I have lost my source of employment due to the Covid-19 pandemic and can no longer afford to consume tobacco...
- Other (please specify)
- None of the above

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?

- I intend to quit smoking permanently due to the Covid-19 pandemic
- I intend to stop smoking temporarily while the Covid-19 pandemic is ongoing
- None of the above
- I intend to switch permanently to E-Cigarettes due to the Covid-19 pandemic
- I intend to switch temporarily to E-Cigarettes while the Covid-19 pandemic is ongoing
- I intend to switch permanently to Heated Tobacco products due to the Covid-19 pandemic
- I intend to switch temporarily to Heated Tobacco products while the Covid-19 pandemic is ongoing
- I intend to switch permanently to Smokeless Tobacco products due to the Covid-19 pandemic
- I intend to switch temporarily to Smokeless Tobacco products while the Covid-19 pandemic is ongoing

**Impact of COVID-19**

<table>
<thead>
<tr>
<th>Select: Country</th>
<th>Select: Gender</th>
<th>Select: Age</th>
<th>Number of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>All</td>
<td>All</td>
<td>6073</td>
</tr>
</tbody>
</table>

**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?**

- I am going outside of the house less, so I am not able to buy as much as I usually would (453 respondents)
- I am worried about the risk smoking poses to my health, in light of the pandemic (453 respondents)
- I am worried about the risk smoking poses to the health of others, in light of the pandemic (453 respondents)
- The shops that I usually buy my tobacco or nicotine products from have been closed (453 respondents)
- I have had to take a salary reduction due to the Covid-19 pandemic and can no longer afford to consume tobacco... (453 respondents)
- I have lost my source of employment due to the Covid-19 pandemic and can no longer afford to consume tobacco... (453 respondents)
- Other (please specify) (453 respondents)
- None of the above (453 respondents)

**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?**

- I intend to quit smoking permanently due to the Covid-19 pandemic (453 respondents)
- I intend to stop smoking temporarily while the Covid-19 pandemic is ongoing (453 respondents)
- None of the above (453 respondents)
- I intend to switch permanently to E-Cigarettes due to the Covid-19 pandemic (453 respondents)
- I intend to switch temporarily to E-Cigarettes while the Covid-19 pandemic is ongoing (453 respondents)
- I intend to switch permanently to Heated Tobacco products due to the Covid-19 pandemic (453 respondents)
- I intend to switch temporarily to Heated Tobacco products while the Covid-19 pandemic is ongoing (453 respondents)
- I intend to switch permanently to Smokeless Tobacco products due to the Covid-19 pandemic (453 respondents)
- I intend to switch temporarily to Smokeless Tobacco products while the Covid-19 pandemic is ongoing (453 respondents)
Demographics

Respondents by country of residence

United Kingdom: 1991
Poland: 1027
Slovakia: 515
Hungary: 514
Finland: 509
Sweden: 507
Denmark: 506
Latvia: 504

Number of respondents: 6073

Respondents by gender

Female: 60%
Male: 40%

Respondents by age

25-34: 20%
35-44: 15%
18-24: 10%
45-54: 5%
55-64: 3%
65-70: 1%
71 or older: 1%

How frequently do you consume each of the following products?

- Cigarettes
- Cigarillos
- Cigars
- E-cigarettes
- Hand-rolled RYO/MYO tobacco
- Heated tobacco
- Nicotine replacement products (NRT, gum, patches, etc)
- Shisha/Hookah/Pipe tobacco
- Smokeless tobacco

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

- Menthol Cigarettes
- Menthol E-cigarettes
- Menthol Hand-rolled RYO/MYO tobacco
- Menthol Cigars
- Menthol Shisha/Hookah/Pipe tobacco
- Menthol Cigarillos
- Menthol Nicotine replacement products (NRT, gum, patches, etc)
- Menthol Shisha/Hookah/ Pipe tobacco
- Menthol Smokeless tobacco
- Menthol Heated tobacco
Demographics

Respondents by current marital status

- Married
- Single
- Partnership
- Divorced
- Widow/widower
- Other
- Would prefer not to say

No. of respondents

- No one, I live alone
- My parent(s) or in-law(s)
- Related adults (eg, siblings, cousins, aunts, uncles)
- Adult children 18-25 years old
- Related adults (eg, siblings, cousins, aunts, uncles)
- Other adults, not related to me (eg, roommates)

Who else lives in your household full-time?

Respondents by highest level of education

- Bachelor's degree from college or university
- Secondary school graduate
- Vocational school graduate or technical school certificate
- A levels or college equivalent
- Graduate or post-graduate studies (eg, master's, doctoral ...)
- Primary school graduate
- Other

Respondents by primary work status

- Paid work: full-time for at least 35 hours per week
- Paid work: part-time for less than 35 hours per week
- Unemployed
- Self-employed
- In part-time education
- Completely retired from work
- Not working temporarily (eg, on sabbatical, on maternity ...)
- Not working semi-permanently or permanently (eg, due t...
- Looking after the home

Survey source: Euromonitor International June 2020
Respondents by household’s total annual income

- 15,001 GBP - 30,000 GBP: 8%
- 30,001 GBP - 45,000 GBP: 6%
- 76,701 PLN - 1,53,400 PLN: 4%
- 45,001 GBP - 60,000 GBP: 4%
- 7,501 GBP - 15,000 GBP: 2%
- 25,001 EUR - 50,000 EUR: 2%
- 60,001 GBP - 75,000 GBP: 2%
- 0 - 1,900 GBP: 0%

Which best describes where you currently live?

- Large town or suburb (25,000 – less than 100,000 inhabitants): 15%
- Small town (2,000 – less than 25,000 inhabitants): 11%
- Small city or suburb (100,000 – 500,000 inhabitants within the city): 11%
- Medium-sized city (500,000 – less than 1,500,000 inhabitants): 11%
- Small village or rural area (less than 2,000 inhabitants): 11%
- Large-sized city (1.5 million – less than 4 million inhabitants within the city): 11%
- Metropolis (4 million – less than 10 million inhabitants within the city): 11%
- Megacity (10+ million inhabitants within the city): 11%

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

- White or Caucasian
- Would prefer not to say
- Other
- Arab
- South Asian
- Indigenous tribe member
- Black or African descent
- Central Asian
- East Asian
- Hispanic or Latino

Respondents by race and/or ethnicity (United Kingdom)

- White - English / Welsh /...
- Any other White background
- Asian / Asian British
- Black / African / Caribbean
- Mixed/multiple ethnic group
- Arab
- Any other Mixed / Multi...