

November 2020



## **Dashboard overview**

## Scope & background

## **Project background**

The Foundation for a Smoke-Free World commissioned a study to assess 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

### **Recent EU menthol ban**

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

### **Actual ban reaction**

This section includes questions which will allow us to understand actual 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



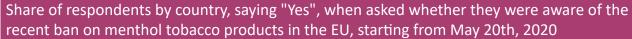
Country overview	Menthol context
Current tobacco consumption: Page 1	Current tobacco consumption: Page 2
Current menthol consumption	
Consumer profile	
Menthol ban awareness and perception: Page 1	Menthol ban awareness and perception: Page 2
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Impact of COVID-19: Page 1	Impact of COVID-19: Page 2
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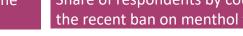
# Country overview

Menu

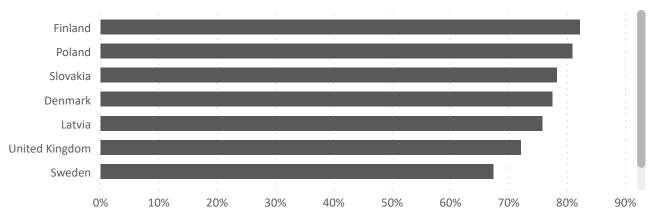
Number of respondents

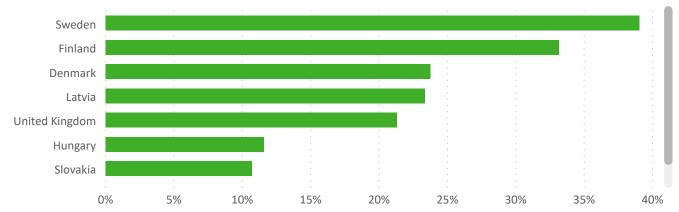
6320





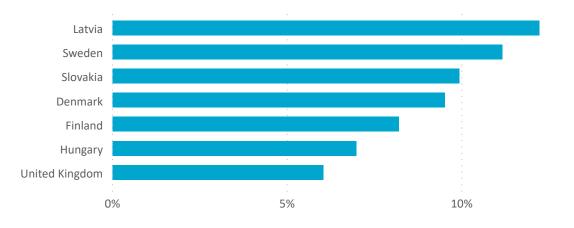
Share of respondents by country, who are either "strongly in favour" or "somewhat in favour" of the recent ban on menthol tobacco products in the EU, starting May 20th, 2020

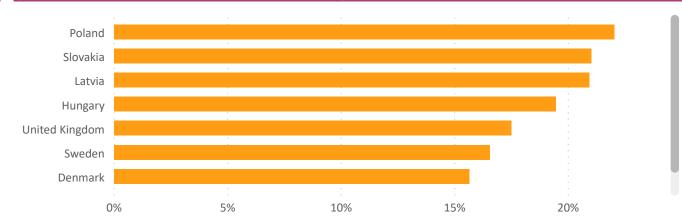




Share of respondents by country, saying "I have quit smoking completely", when asked what action/actions they took as a result of the recent ban

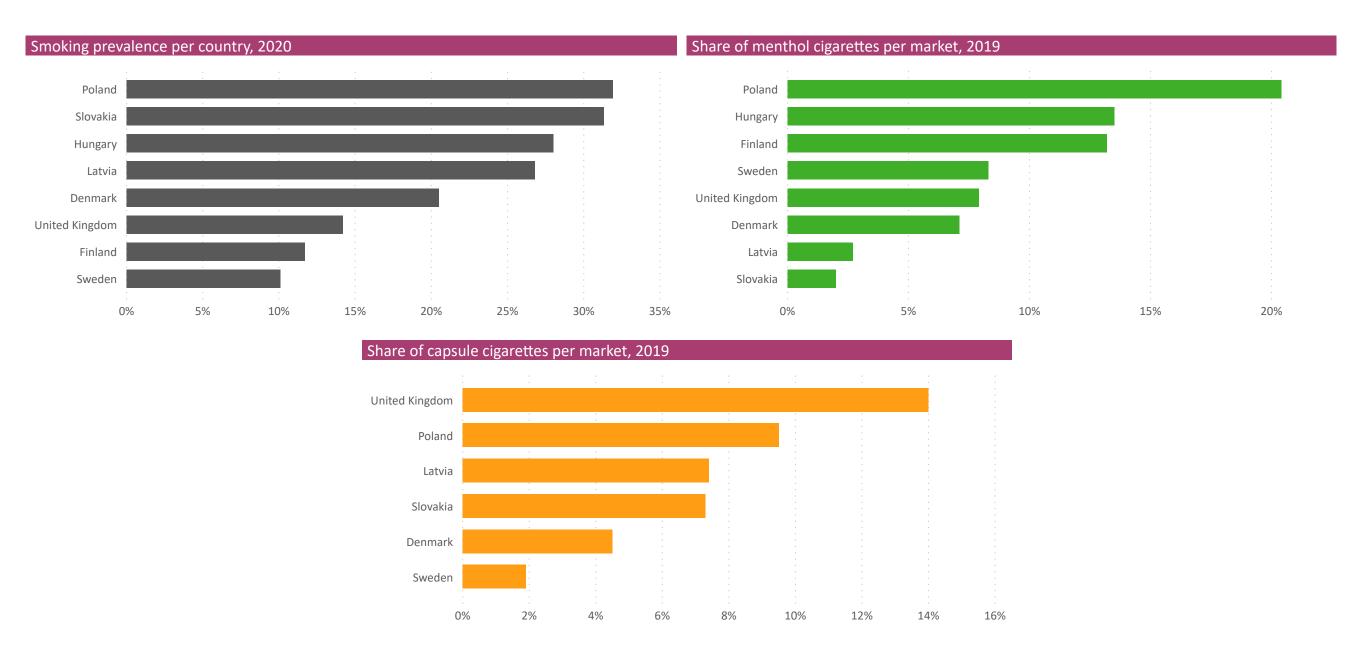
Share of respondents by country, saying "I have switched to other menthol tobacco or nicotine products", when asked what action/actions they took as a result of the recent ban





## Menthol context



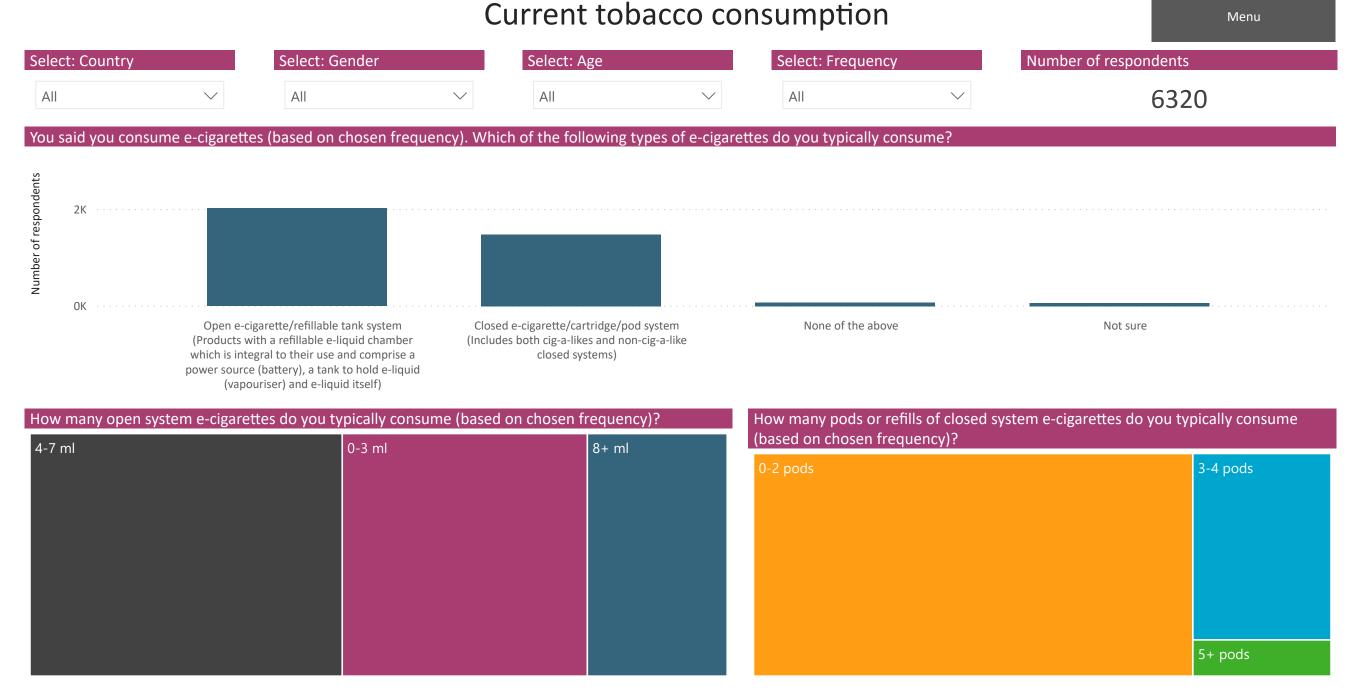


Source: Euromonitor Passport database, November 2020

## Current tobacco consumption Select: Country Select: Gender Select: Age Select: Frequency Number of respondents 6320 All All How many of each of the following product types do you typically consume? (Based on chosen frequency) **Frequencies** • 1-5 sticks • 6-19 sticks • 20+ sticks Hand-rolled RYO/MYO tobacco Cigarettes Cigarillos Cigars Heated tobacco How many portions of each of the following products do you typically consume? (Based on chosen How many sessions of consuming Shisha/Hookah/Pipe tobacco do you typically have? (Based on chosen frequency) frequency) **Frequencies** ● 1-4 portions ● 5-9 portions ● 10+ portions **Frequencies** • 0-1 sessions • 2-3 sessions • 4+ sessions 1,000 Number of respondents Nicotine replacement products Smokeless tobacco Shisha/Hookah/Pipe tobacco

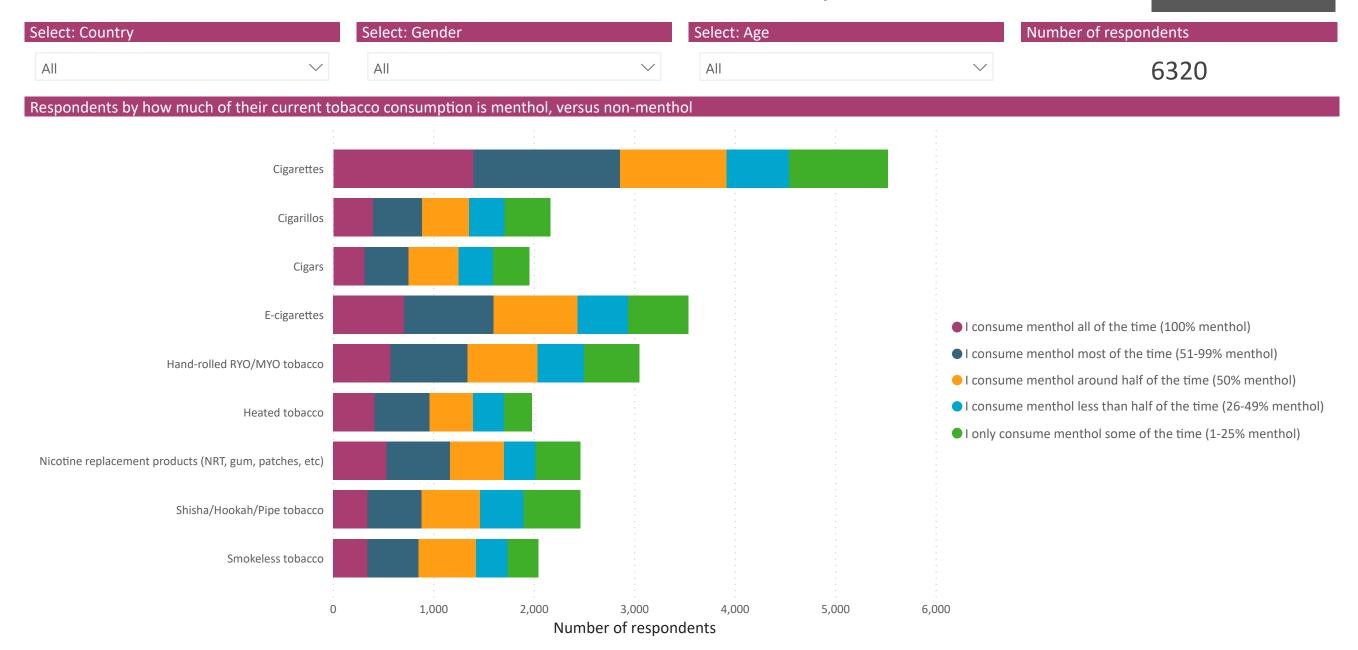
Survey source: Euromonitor International, November 2020

Menu



# Current menthol consumption

Menu



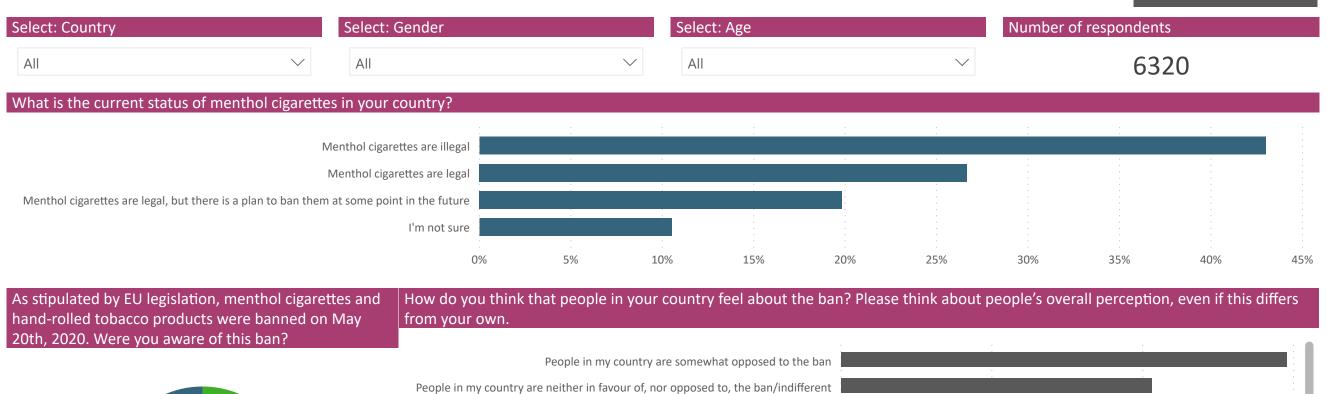
#### Select: Country Select: Gender Select: Choice of tobacco product Number of respondents Select: Age All All ΑII ΑII 6320 When do you usually consume tobacco or nicotine products? Where do you usually purchase your tobacco or nicotine products from? Multiple times during the day On weekends 50% In the evening In the afternoon Independent Specialist Online When Individuals Forecourt Department Hotels, Grocery In the morning corner shops stores tobacco retailers travelling restaurants (hypermark... (newsagents, stores abroad and bars tobacco supermarke... At night kiosks) discounters, convenience 0% 20% 40% 60% 80% 10... stores) On what occasions do you usually consume tobacco or nicotine products? Please select the one statement which best reflects why Which of the following statements best reflect why you consume menthol cigarettes? you consume cigarettes. Relaxing at home Other (please ... 1.8% — I prefer the taste of me... I smoke to manage stress I smoke due to boredom Taking a break from working / studying Everyone ... 4.3% 30.3% 31.2% 10.6% Menthol cigarett... Socialising with friends/co-workers 10.8% I smoke to relie... Celebration/party 12.0% Family gathering/Outing On-the-go **Enjoying Music** Having a meal Menthol cigarett... 17.1% Other (please specify) I smoke when socialisin... I smoke because it is a part o... I enjoy the minty feeling/sen... 19.4% 0% 50% 100% 21.3% 29.4%

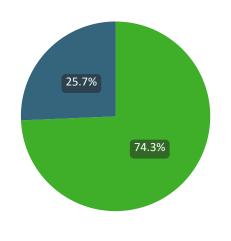
Consumer profile

Menu

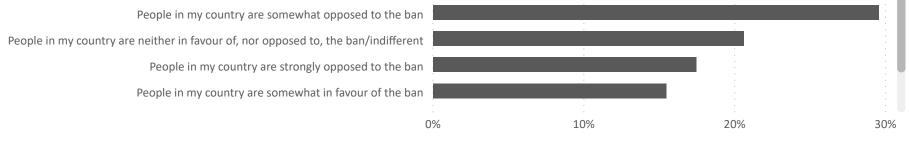
# Menthol ban awareness and perception

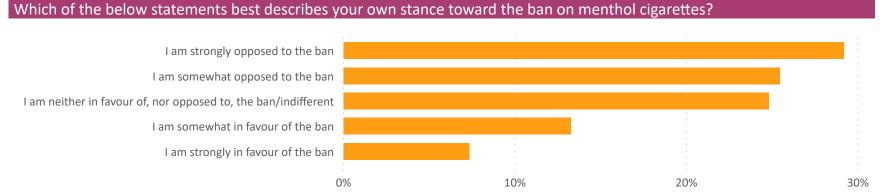
Menu











### Menthol ban awareness and perception Menu Select: Gender Number of respondents Select: Country Select: Age ΑII ΑII 6320 ΑII You said you were {"strongly in favour" / "somewhat in favour"} of the recent ban on menthol cigarettes. Which of the following best describes your main reason for supporting the ban? Menthol cigarettes encourage young people to smoke N = 1301Menthol cigarettes encourage women to smoke Menthol cigarettes are more addictive than ordinary tobacco products 0% 10% 15% 20% 25% 30% 35% 40% You said you were {"strongly opposed" / "somewhat opposed"} to the recent 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 The ban will not work – people will continue to purchase menthol cigarettes through other channels 0% 5% 10% 15% 20% 25% 35% 40% 30% You said you were neither in favour of, nor opposed to, the recent 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 The ban will not work – people will continue to purchase menthol cigarettes through other channels

5%

10%

15%

20%

25%

30%

35%

0%

Survey source: Euromonitor International, November 2020

I do not believe there is any evidence that menthol cigarettes encourage young people to smoke

#### Select: Gender Number of respondents Select: Country Select: Age All ΑII ΑII 6320 Thinking about the menthol ban, what action or actions did you take as a result of the recent ban on menthol cigarettes? I have reduced my consumption of menthol cigarettes I have stopped consuming menthol cigarettes, but have continued consuming non-menthol cigarettes I have switched to other menthol tobacco products not affected by the ban, such as menthol cigars, cigarillos, e-... I have started buying products which allow me to manually add a menthol flavour to regular tobacco products, s... 0% 5% 10% 15% 20% 25% 30% You said you have quit smoking completely as a result of the recent ban. How much of an impact did the recent Covid-19 pandemic have on your decision? No impact at all Very little impact Somewhat of an impact Quite a large impact 0% 10% 20% 30% 40% 50% How much of an impact did the following factors have on your decision? Health concerns linked to COVID-19 Unable to leave the house due to COVID-19 N = 5840Closure of e-vapour stores My usual contact had limited supply 0% 40% 60% 80% 100% 20% ● No impact at all ● Very little impact ● Somewhat of an impact ● Quite a large impact ● Very large impact

Menthol ban response

Menu

### Menthol ban response Menu Select: Gender Number of respondents Select: Country Select: Age All ΑII 6320 ΑII You said you have started buying menthol cigarettes from other sources since the ban. Which of the following best describes where you buy these products from since 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 N = 835From local markets From local street vendors 0% 10% 20% 30% 40% 50% 60% You said you have switched to other menthol tobacco or nicotine products not affected by the recent ban. Which of the following products have you switched to since the ban? 50% N = 11690% E-cigarettes Cigarillos Heated tobacco Smokeless tobacco Cigars Shisha/Hookah/Pipe Nicotine replacement Other (please specify) tobacco products (NRT, gum, patches, etc) You said you have started buying products which allow you to manually add a menthol flavour to regular tobacco or nicotine products. Which of the following products have you started buying since the ban?

Menthol capsule tubes

Other (please specify)

Menthol sprays

Survey source: Euromonitor International, November 2020

Menthol flavour cards

Menthol filter tips

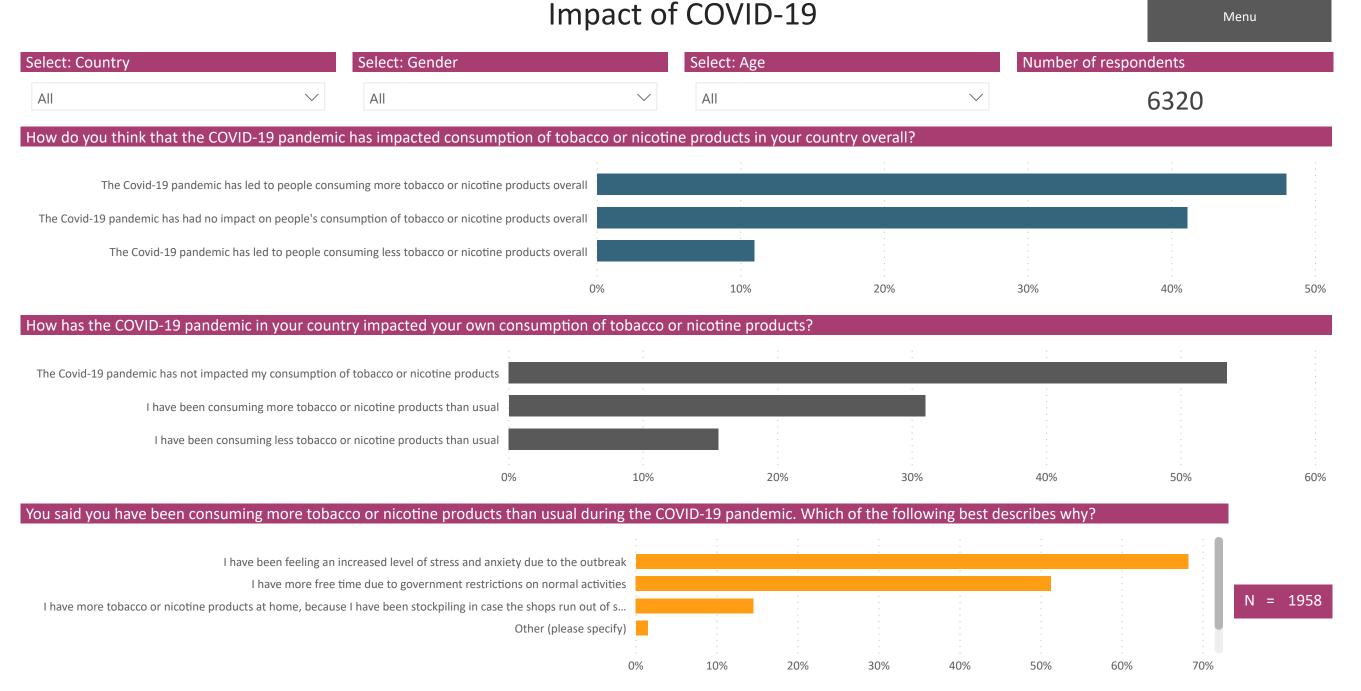
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#### Select: Gender Number of respondents Select: Country Select: Age All ΑII ΑII 6320 Thinking about the menthol ban, what action or actions did you take as a result of the recent ban on menthol cigarettes? I have reduced my consumption of menthol cigarettes I have stopped consuming menthol cigarettes, but have continued consuming non-menthol cigarettes I have switched to other menthol tobacco products not affected by the ban, such as menthol cigars, cigar... Actual I have started buying products which allow me to manually add a menthol flavour to regular tobacco pro... I have started buying menthol cigarettes from other sources I have stopped consuming menthol cigarettes, but have increased my consumption of non-menthol cigar... I have quit smoking completely 0% 5% 10% 20% 25% 30% 15% Select: Gender Select: Age Select: Country Number of respondents ΑII ΑII 6073 ΑII Thinking about the menthol ban, what action or actions are you 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 switch to other menthol tobacco products not affected by the ban, such as menthol cigars, cigarillos,... I will stop consuming menthol cigarettes, but will increase my consumption of non-menthol cigarettes Intended I will start buying menthol cigarettes from other sources I will quit smoking completely I will start buying products which allow me to manually add a menthol flavour to regular tobacco product... Other (please specify) 0% 5% 10% 15% 20% 25% 30% 35% 40%

Menthol ban intended vs. actual response

Menu

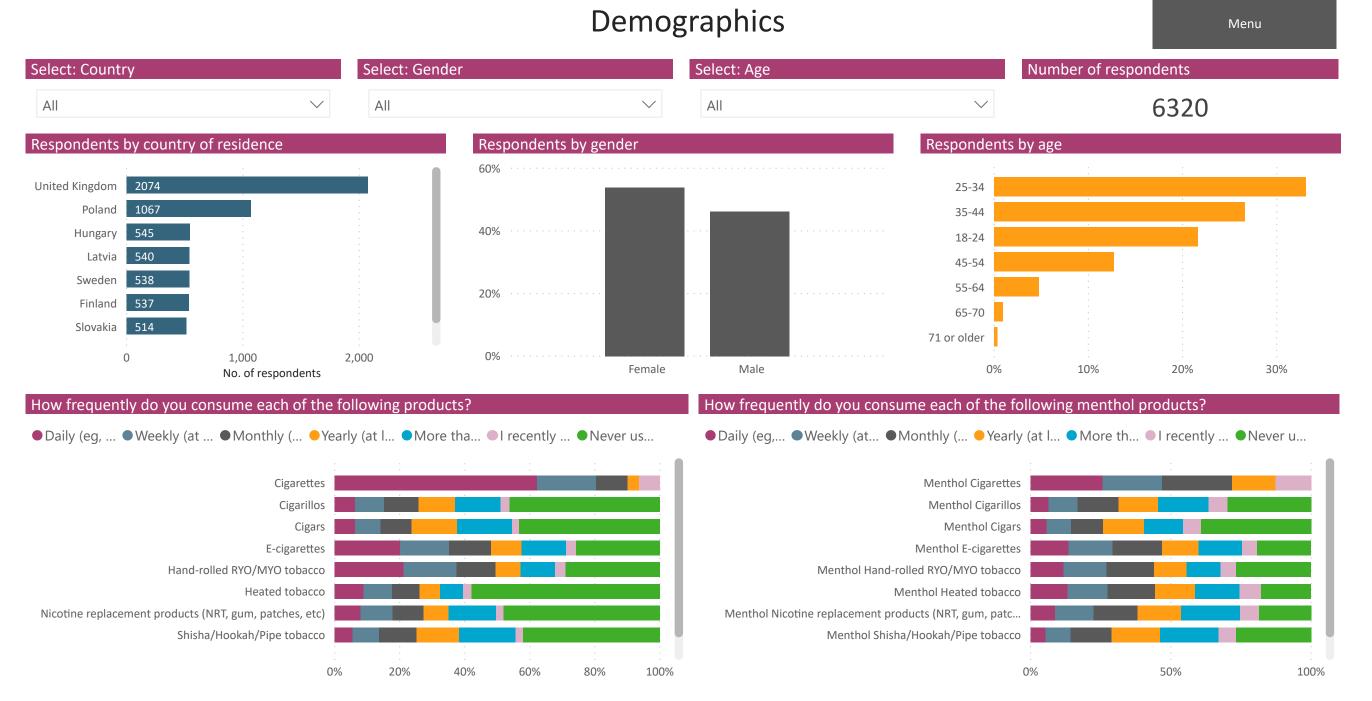
Survey source: Euromonitor International, November 2020 [Actual] & June 2020 [Intended]



# Impact of COVID-19

Menu





#### Demographics Menu Select: Country Select: Gender Select: Age Number of respondents 6320 All ΑII All Who else lives in your household full-time? Respondents by current marital status Partner or spouse Married Child(ren) or grandchild(ren) 6-12 years old Single Child(ren) or grandchild(ren) 0-5 years old Partnership Child(ren) or grandchild(ren) 13-17 years old Divorced No one, I live alone Other My parent(s) or in-law(s) Adult child(ren) or grandchild(ren) 18-25 years old Widow/widower Related adults (eg, siblings, cousins, aunts, uncles) Would prefer not to say Other adults, not related to me (eg, roommates) 500 1,000 1,500 2,000 2,500 0% 10% 20% 30% 40% 50% No. of respondents Respondents by highest level of education Respondents by primary work status Paid work: full-time for at least 35 hours per week Bachelor's degree from college or university In full-time education (including on vacation from school) Secondary school graduate Paid work: part-time for less than 35 hours per week A levels or college equivalent Self-employed Graduate or post-graduate studies (eg, master's, doctoral ... Unemployed In part-time education Vocational school graduate or technical school certificate Not working semi-permanently or permanently (eg, due t... Primary school graduate Not working temporarily (eg, on sabbatical, on maternity ... Other Looking after the home

0%

20%

40%

Survey source: Euromonitor International, November 2020

0%

10%

20%

#### **Demographics** Menu Select: Age Number of respondents Select: Country Select: Gender Denmark ΑII All 505 Respondents by household's total annual income Which best describes where you currently live? 2,68,701 DKK - 4,03,000 DKK Large town or suburb (25,000 – less than 100,000 inhabit... 1,34,401 DKK - 2,68,700 DKK 4,03,001 DKK - 5,37,400 DKK Small town (2,000 – less than 25,000 inhabitants) 67,201 DKK - 1,34,400 DKK Medium-sized city (500,000 - less than 1,500,000 inhabit... 6,71,801 DKK - 10,07,000 DKK 5,37,401 DKK - 6,71,800 DKK Small village or rural area (less than 2,000 inhabitants) 33,601 DKK - 67,200 DKK 0 - 16,800 DKK Small city or suburb (100,000 – 500,000 inhabitants withi... 0% 5% 15% 20% 25% 0% 20% No. of respondents Respondents by race and/or ethnicity (except United Kingdom) Respondents by race and/or ethnicity (United Kingdom)

White or Caucasian Hispanic or Latino South Asian East Asian Would prefer not to say Arab Black or African descent Other