EU Menthol Ban Impact Analysis: Phase 2 (Post-ban) Survey Results

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

- Finland: 0%
- Poland: 10%
- Slovakia: 20%
- Denmark: 30%
- Latvia: 40%
- United Kingdom: 50%
- Sweden: 60%

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

- Sweden: 35%
- Finland: 30%
- Denmark: 25%
- Latvia: 20%
- United Kingdom: 15%
- Hungary: 10%
- Slovakia: 5%

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

- Latvia: 10%
- Sweden: 5%
- Slovakia: 5%
- Denmark: 5%
- Finland: 5%
- Hungary: 5%
- United Kingdom: 5%

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

- Poland: 20%
- Slovakia: 15%
- Latvia: 15%
- Hungary: 15%
- United Kingdom: 15%
- Sweden: 10%
- Denmark: 10%

Survey source: Euromonitor International, November 2020
Menthol context

Smoking prevalence per country, 2020

- 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, November 2020
How many of each of the following product types do you typically consume? (Based on chosen frequency)

- **Cigarettes**
  - Frequencies: 1-5 sticks, 6-19 sticks, 20+ sticks
  - Number of respondents: 2,000

- **Cigarillos**
  - Frequencies: 1-5 sticks, 6-19 sticks, 20+ sticks
  - Number of respondents: 1,000

- **Cigars**
  - Frequencies: 1-5 sticks, 6-19 sticks, 20+ sticks
  - Number of respondents: 500

- **Hand-rolled RYO/MYO tobacco**
  - Frequencies: 1-5 sticks, 6-19 sticks, 20+ sticks
  - Number of respondents: 200

- **Heated tobacco**
  - Frequencies: 1-5 sticks, 6-19 sticks, 20+ sticks
  - Number of respondents: 40

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

- **Nicotine replacement products**
  - Frequencies: 1-4 portions, 5-9 portions, 10+ portions
  - Number of respondents: 500

- **Smokeless tobacco**
  - Frequencies: 1-4 portions, 5-9 portions, 10+ portions
  - Number of respondents: 200

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

- **Shisha/Hookah/Pipe tobacco**
  - Frequencies: 0-1 sessions, 2-3 sessions, 4+ sessions
  - Number of respondents: 1,000

Survey source: Euromonitor International, November 2020
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

Survey source: Euromonitor International, November 2020
Current menthol consumption

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

- 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

Survey source: Euromonitor International, November 2020
## Consumer profile

**Select: Country**
- All

**Select: Gender**
- All

**Select: Age**
- All

**Select: Choice of tobacco product**
- All

**Number of respondents**
- 6320

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

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

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

- Multiple times during the day
- On weekends
- In the evening
- In the afternoon
- 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
- Enjoying Music
- Having a meal
- Other (please specify)

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

- I smoke to manage stress 31.2%
- I smoke to relieve... 10.6%
- I smoke when socialising... 19.4%
- Other (please specify) 1.8%

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

- I prefer the taste of menthol... 30.3%
- I enjoy the minty feeling/... 29.4%
- Menthol cigarette... 17.1%
- Other (please specify) 1.8%

**Survey source:** Euromonitor International, November 2020
Menthol ban awareness and perception

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

- Menthol cigarettes are illegal
- Menthol cigarettes are legal
- Menthol cigarettes are legal, but there is a plan to ban them at some point in the future
- I'm not sure

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

- People in my country are somewhat opposed to the ban
- People in my country are neither in favour of, nor opposed to, the ban/indifferent
- People in my country are strongly opposed to the ban
- People in my country are somewhat in favour of the ban

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

- I am strongly opposed to the ban
- I am somewhat opposed to the ban
- I am neither in favour of, nor opposed to, the ban/indifferent
- I am somewhat in favour of the ban
- I am strongly in favour of the ban

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

- Yes – I was aware of the ban on ... 74.3%
- No – I was not aware of ... 25.7%

Survey source: Euromonitor International, November 2020
Menthol ban awareness and perception

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
- Menthol cigarettes encourage women to smoke
- Menthol cigarettes are more addictive than ordinary tobacco products

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

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

Survey source: Euromonitor International, November 2020
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...

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
- Very large impact

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
- Closure of e-vapour stores
- My usual contact had limited supply

Survey source: Euromonitor International, November 2020
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 (50%)
- From online retailers which ship from other countries where menthol cigarettes are available (30%)
- From shops which continue to sell menthol cigarettes despite the ban (20%)
- From local markets
- From local street vendors

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?

- E-cigarettes (50%)
- Cigarillos
- Heated tobacco
- Smokeless tobacco
- Cigars
- Shisha/Hookah/Pipe tobacco
- Nicotine replacement products (NRT, gum, patches, etc)
- Other (please specify)

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 flavour cards (50%)
- Menthol filter tips
- Menthol capsule tubes
- Menthol sprays
- Other (please specify)

Survey source: Euromonitor International, November 2020
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, etc.
- I have started buying products which allow me to manually add a menthol flavour to regular tobacco products
- I have started buying menthol cigarettes from other sources
- I have stopped consuming menthol cigarettes, but have increased my consumption of non-menthol cigarette
- I have quit smoking completely

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, etc.
- I will stop consuming menthol cigarettes, but will increase my consumption of non-menthol cigarettes
- 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 products
- Other (please specify)
Impact of COVID-19

How do you think that the COVID-19 pandemic has impacted consumption of tobacco or nicotine products in your country overall?

- The Covid-19 pandemic has led to people consuming more tobacco or nicotine products overall
- The Covid-19 pandemic has had no impact on people’s consumption of tobacco or nicotine products overall
- The Covid-19 pandemic has led 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)

Survey source: Euromonitor International, November 2020
Impact of COVID-19

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: 50%
- I am worried about the risk smoking poses to my health, in light of the pandemic: 10%
- I am worried about the risk smoking poses to the health of others, in light of the pandemic: 20%
- The shops that I usually buy my tobacco or nicotine products from have been closed: 10%
- I have had to take a salary reduction due to the Covid-19 pandemic and can no longer afford to consume tobacco: 5%
- Other (please specify): 0%
- I have lost my source of employment due to the Covid-19 pandemic and can no longer afford to consume tobacco: 5%
- None of the above: 5%

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: 50%
- I intend to stop smoking temporarily while the Covid-19 pandemic is ongoing: 30%
- I intend to switch temporarily to E-Cigarettes while the Covid-19 pandemic is ongoing: 10%
- None of the above: 5%
- I intend to switch permanently to E-Cigarettes due to the Covid-19 pandemic: 5%
- I intend to switch temporarily to Heated Tobacco products while the Covid-19 pandemic is ongoing: 0%
- I intend to switch permanently to Smokeless Tobacco products due to the Covid-19 pandemic: 0%
- I intend to switch temporarily to Smokeless Tobacco products while the Covid-19 pandemic is ongoing: 0%

Survey source: Euromonitor International, November 2020

Number of respondents: 6320
Select: Country
All

Select: Gender
All

Select: Age
All

Number of respondents
6320

Respondents by country of residence
- United Kingdom: 2074
- Poland: 1067
- Hungary: 545
- Latvia: 540
- Sweden: 538
- Finland: 537
- Slovakia: 514

Respondents by gender
- Female
- Male

Respondents by age
- 25-34
- 35-44
- 18-24
- 45-54
- 55-64
- 65-70
- 71 or older

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

How frequently do you consume each of the following menthol products?
- Menthol Cigarettes
- Menthol Cigarillos
- Menthol Cigars
- Menthol E-cigarettes
- Menthol Hand-rolled RYO/MYO tobacco
- Menthol Heated tobacco
- Menthol Nicotine replacement products (NRT, gum, patches, etc)
- Menthol Shisha/Hookah/Pipe tobacco

Survey source: Euromonitor International, November 2020
Demographics

Respondents by current marital status

Married: 2,000
Single: 1,500
Partnership: 1,000
Divorced: 500
Widow/widower: 0
Other: 0
Would prefer not to say: 0

Who else lives in your household full-time?

Partner or spouse: 50%
Child(ren) or grandchild(ren) 6-12 years old: 30%
Child(ren) or grandchild(ren) 0-5 years old: 20%
Child(ren) or grandchild(ren) 13-17 years old: 10%
No one, I live alone: 0%
My parent(s) or in-law(s): 0%
Adult child(ren) or grandchild(ren) 18-25 years old: 0%
Related adults (eg, siblings, cousins, aunts, uncles): 0%
Other adults, not related to me (eg, roommates): 0%

Respondents by highest level of education

Bachelor's degree from college or university: 40%
Secondary school graduate: 20%
A levels or college equivalent: 15%
Graduate or post-graduate studies (eg, master's, doctoral ...: 10%
Vocational school graduate or technical school certificate: 10%
Primary school graduate: 5%
Other: 0%

Respondents by primary work status

Paid work: full-time for at least 35 hours per week: 60%
In full-time education (including on vacation from school): 25%
Paid work: part-time for less than 35 hours per week: 10%
Self-employed: 5%
Unemployed: 0%
In part-time education: 0%
Not working semi-permanently or permanently (eg, due t...: 0%
Not working temporarily (eg, on sabbatical, on maternity ...: 0%
Looking after the home: 0%

Survey source: Euromonitor International, November 2020
### Demographics

**Select: Country**
- Denmark

**Select: Gender**
- All

**Select: Age**
- All

**Number of respondents**
- 505

#### Respondents by household’s total annual income

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<th>Income Range</th>
<th>No. of respondents</th>
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<td>1,34,401 DKK - 2,68,700 DKK</td>
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<tr>
<td>0 - 16,800 DKK</td>
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</tbody>
</table>

#### Which best describes where you currently live?

- Large town or suburb (25,000 – less than 100,000 inhabitants) - 0%
- Small town (2,000 – less than 25,000 inhabitants) - 20%
- Medium-sized city (500,000 – less than 1,500,000 inhabitants) - 25%
- Small village or rural area (less than 2,000 inhabitants) - 25%
- Small city or suburb (100,000 – 500,000 inhabitants within city limit) - 0%

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

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

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

- White or Caucasian
- Hispanic or Latino
- South Asian
- East Asian
- Arab
- Black or African descent
- Other

**Survey source:** Euromonitor International, November 2020