



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



Country overview

Menthol context

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Current menthol consumption

Consumer profile

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Menthol ban intended vs. actual response

Impact of COVID-19: Page 1

Impact of COVID-19: Page 2

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Demographics: Page 2

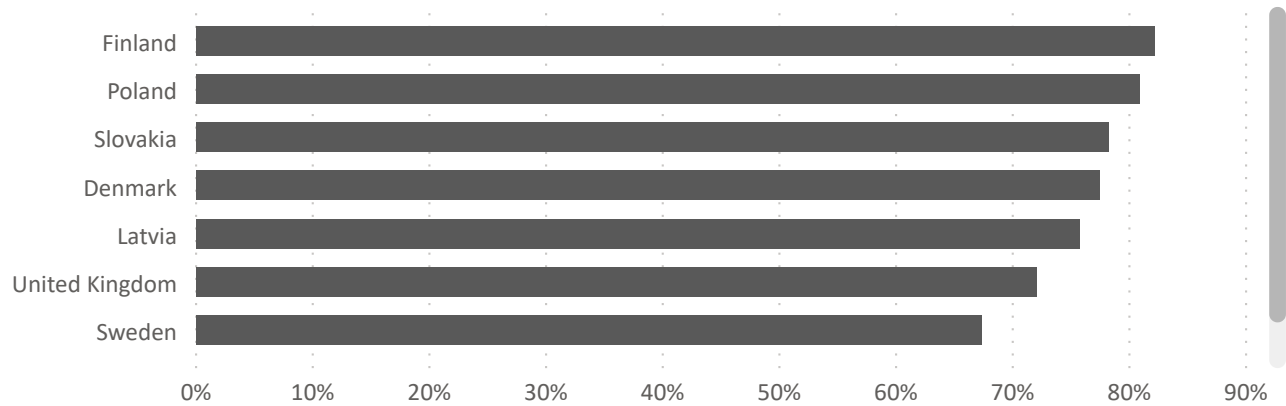
Demographics: Page 3

Country overview

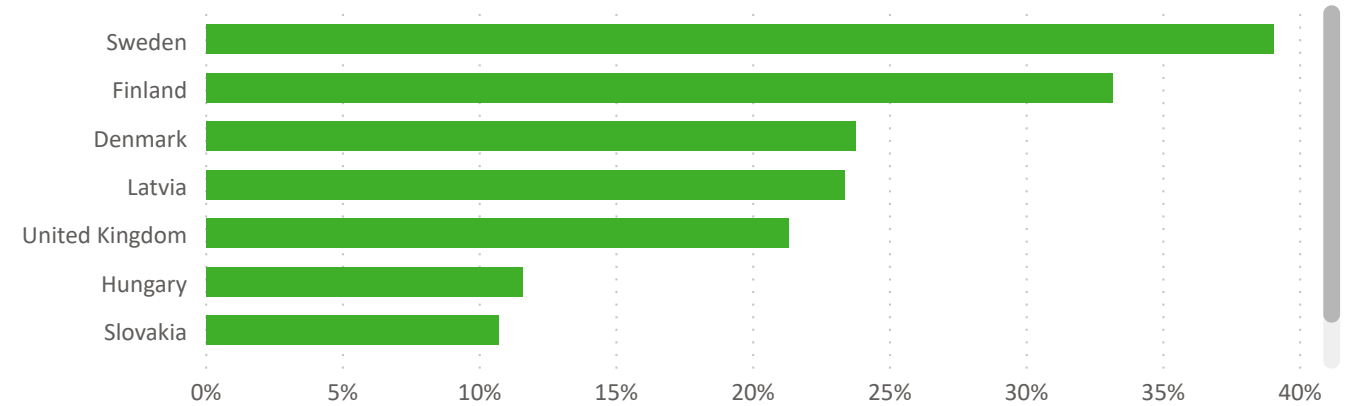
Number of respondents

6320

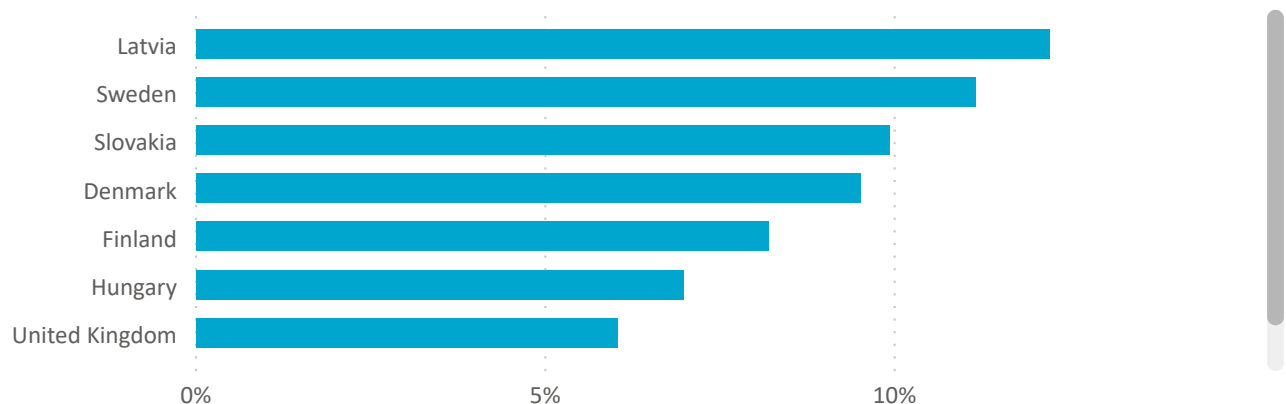
Share of respondents by country, saying "Yes", when asked whether they were aware of the recent ban on menthol tobacco products in the EU, starting from May 20th, 2020



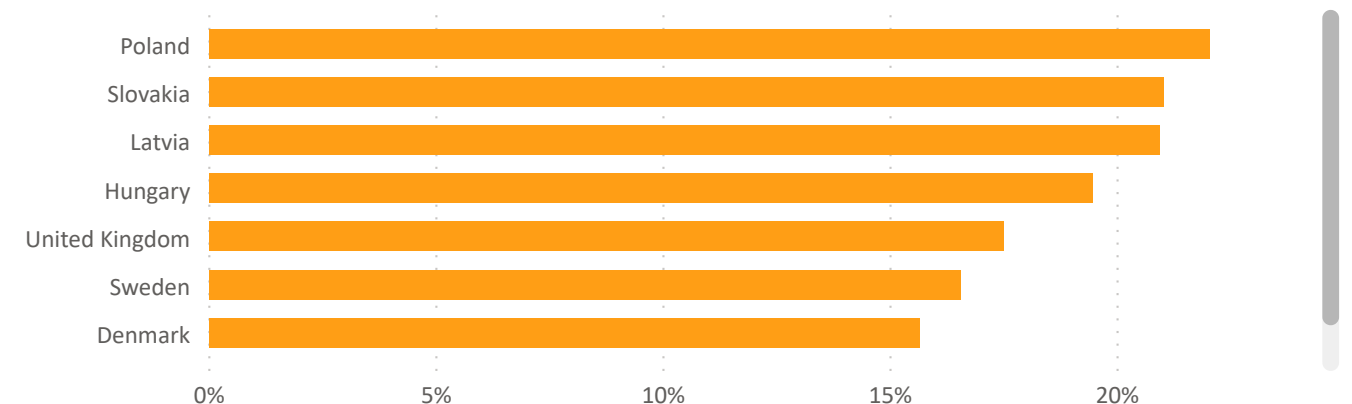
Share of respondents by country, who are either "strongly in favour" or "somewhat in favour" of the recent ban on menthol tobacco products in the EU, starting May 20th, 2020



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

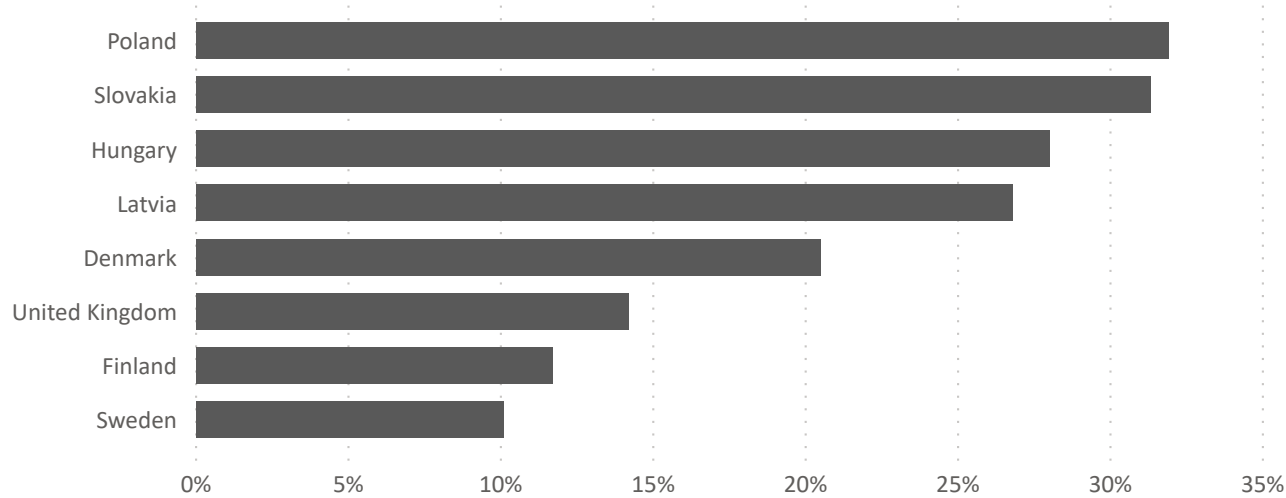


Share of respondents by country, saying "I have switched to other menthol tobacco or nicotine products", when asked what action/actions they took as a result of the recent ban

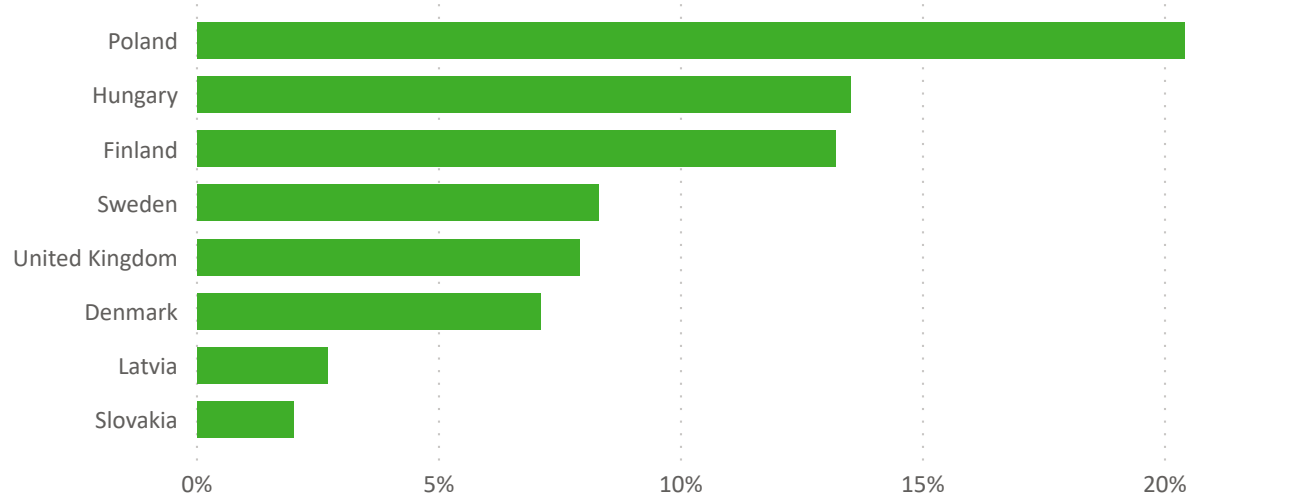


Menthol context

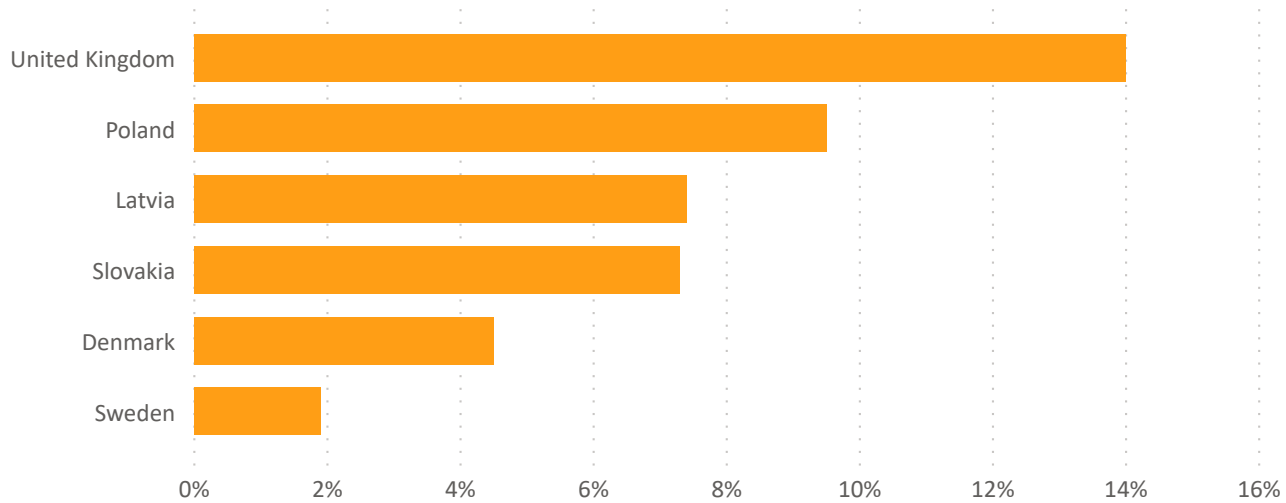
Smoking prevalence per country, 2020



Share of menthol cigarettes per market, 2019



Share of capsule cigarettes per market, 2019



Current tobacco consumption

Menu

Select: Country

Select: Gender

Select: Age

Select: Frequency

Number of respondents

All

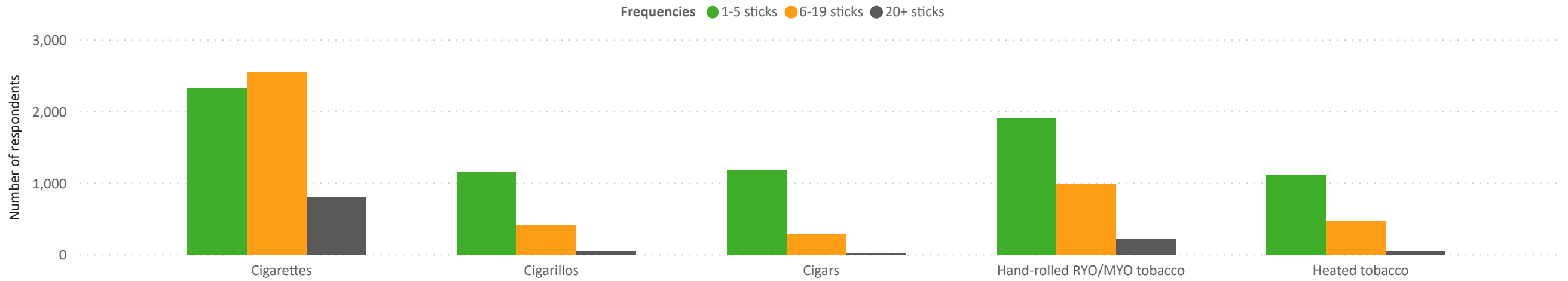
All

All

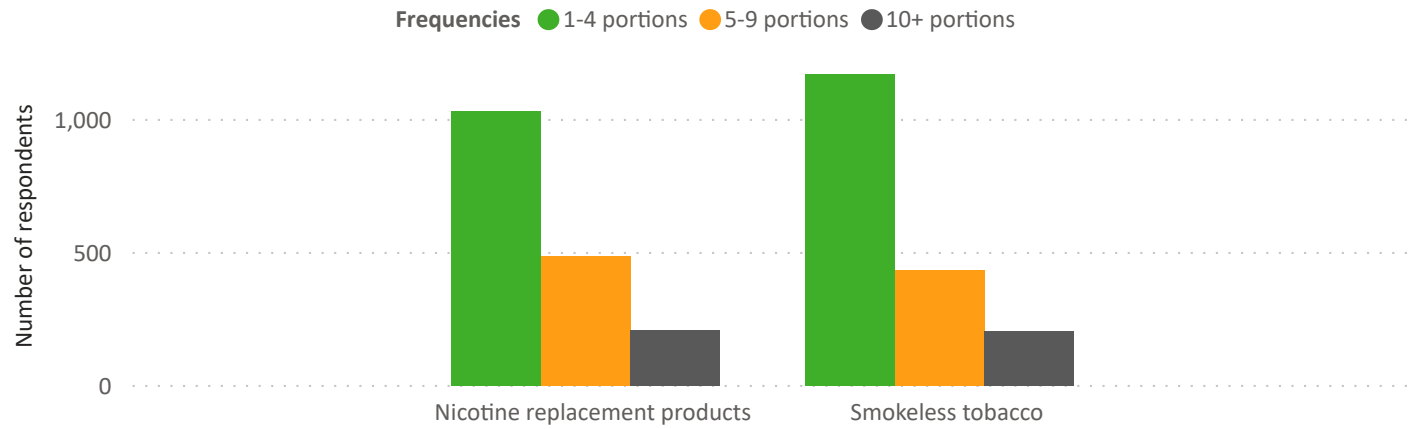
All

6320

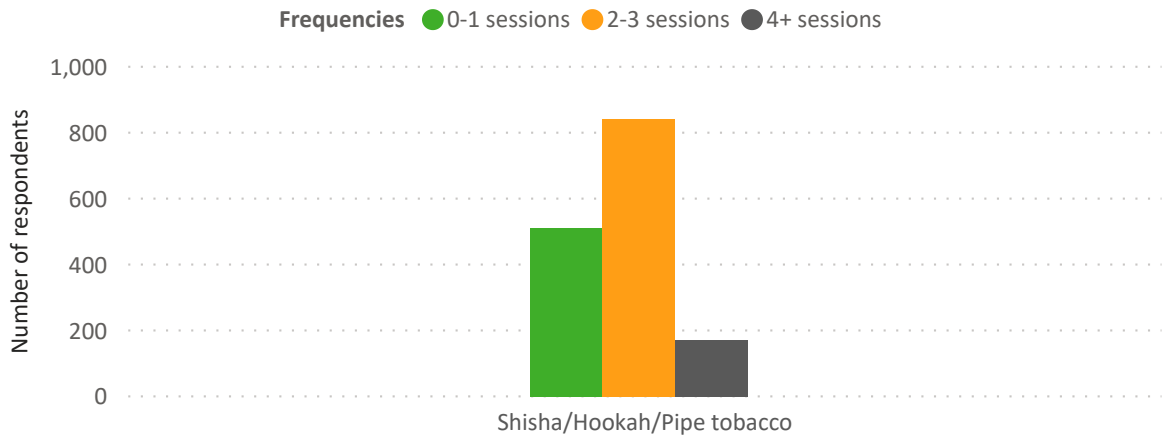
How many of each of the following product types do you typically consume? (Based on chosen frequency)



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)



Survey source: Euromonitor International, November 2020

Current tobacco consumption

Menu

Select: Country

Select: Gender

Select: Age

Select: Frequency

Number of respondents

All

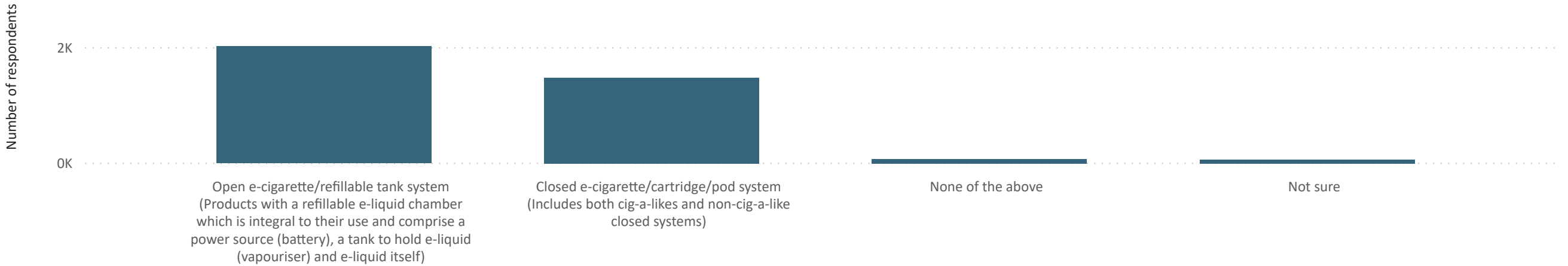
All

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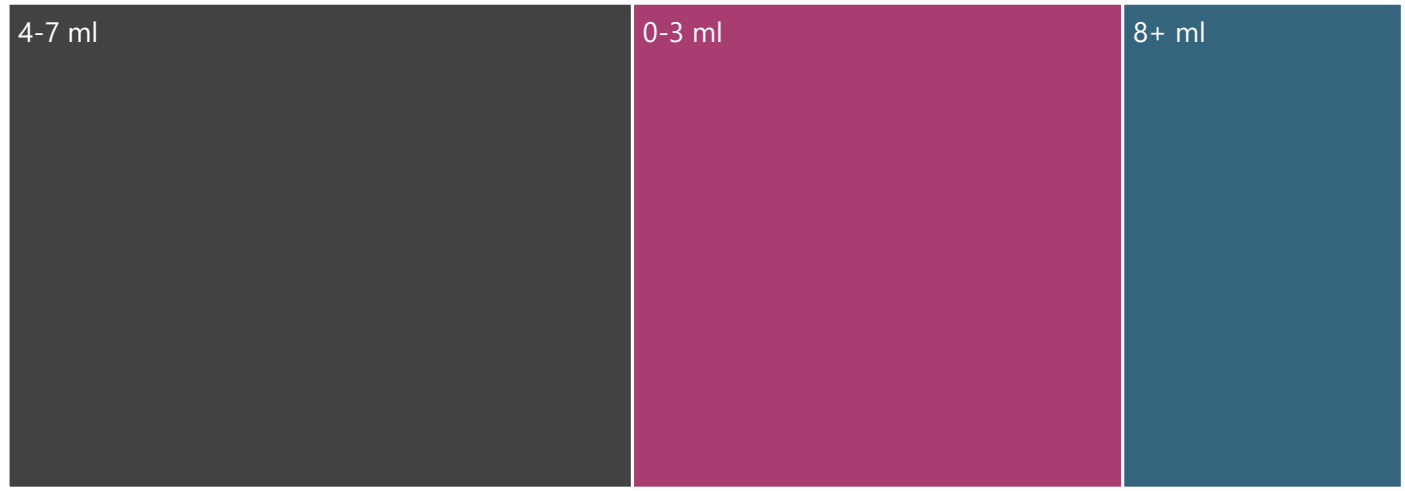
All

6320

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

Menu

Select: Country

Select: Gender

Select: Age

Number of respondents

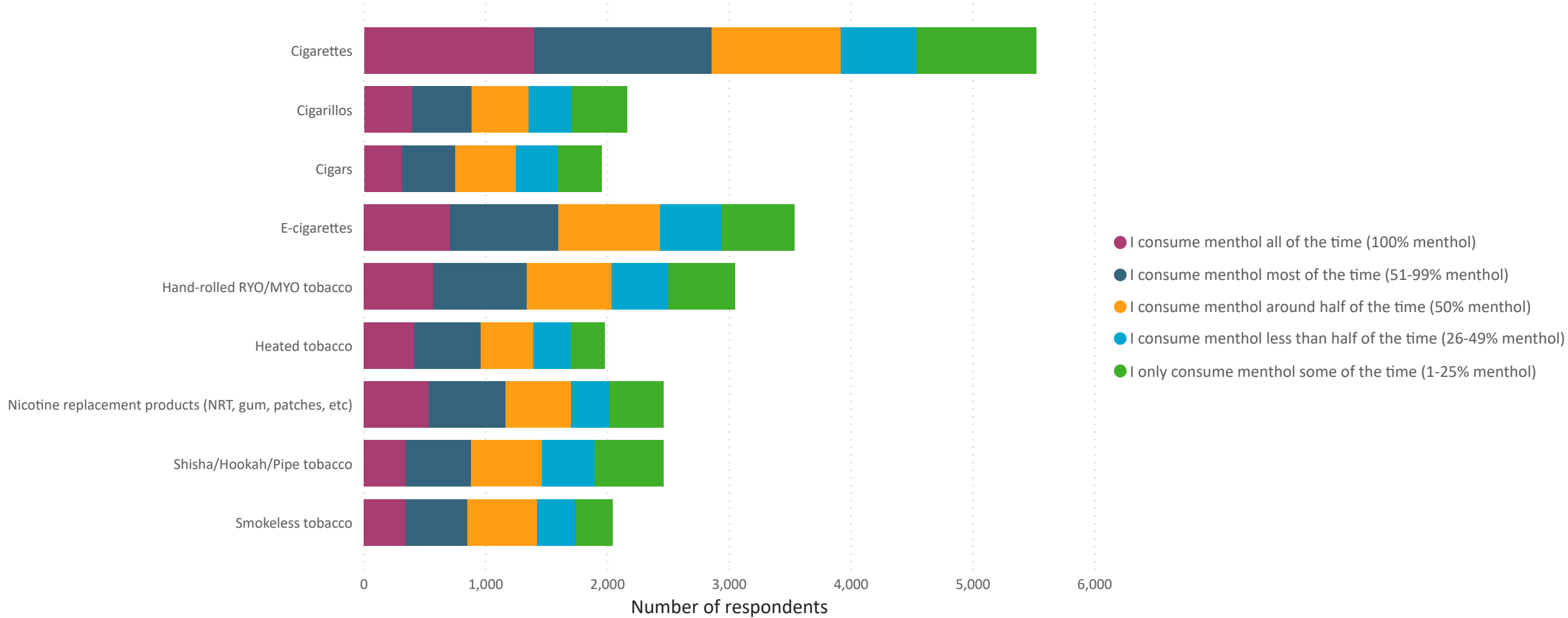
All

All

All

6320

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



Survey source: Euromonitor International, November 2020

Consumer profile

Menu

Select: Country

All

Select: Gender

All

Select: Age

All

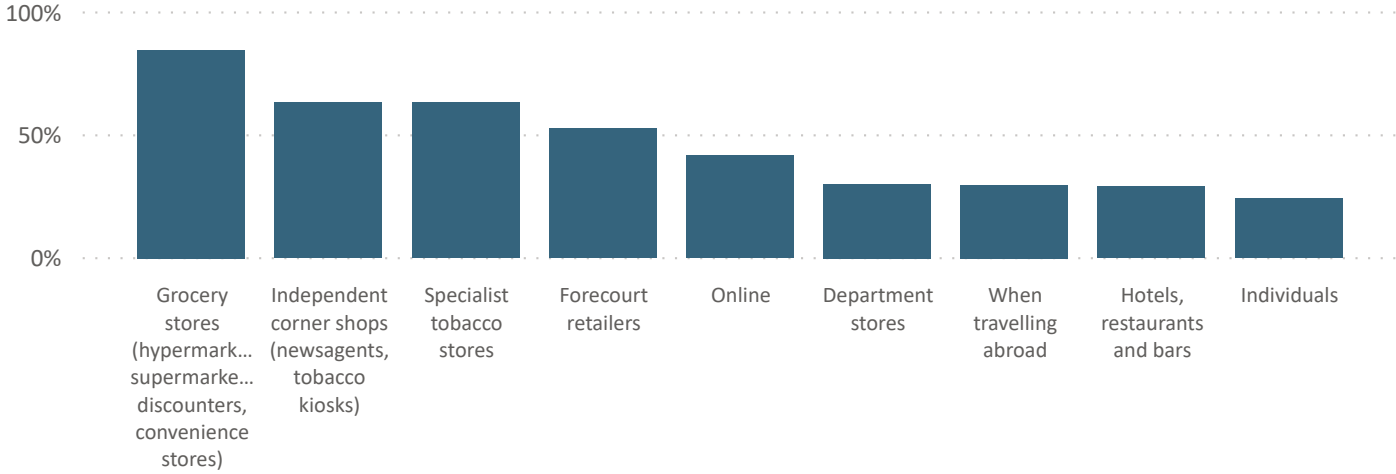
Select: Choice of tobacco product

All

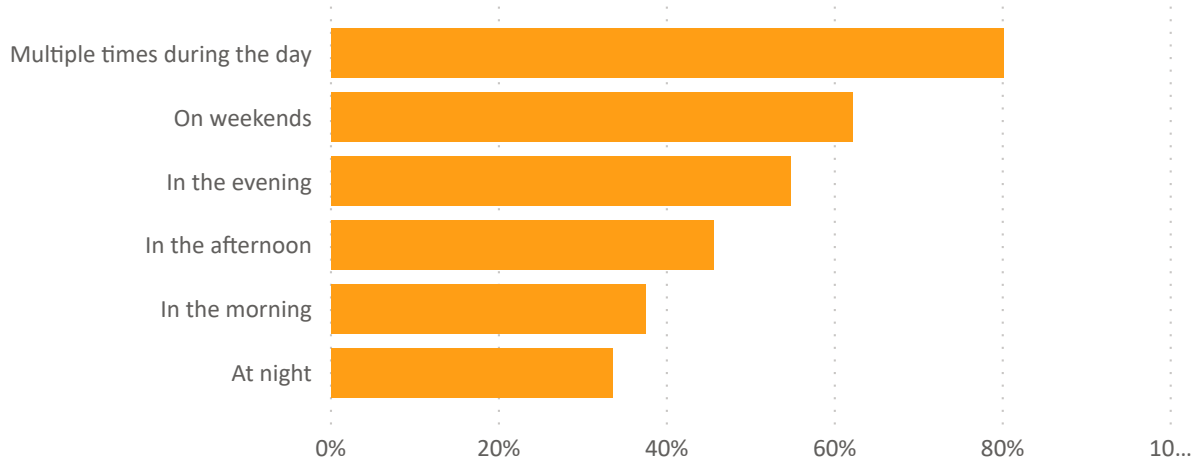
Number of respondents

6320

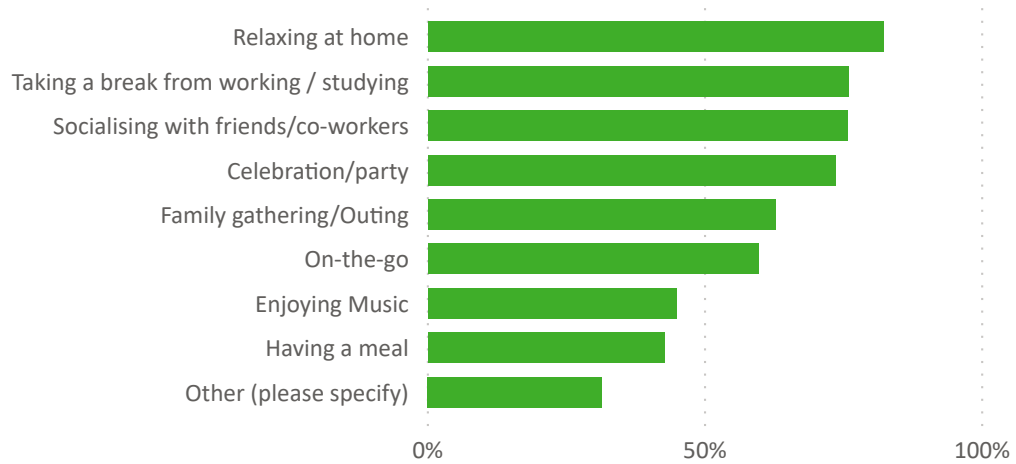
Where do you usually purchase your tobacco or nicotine products from?



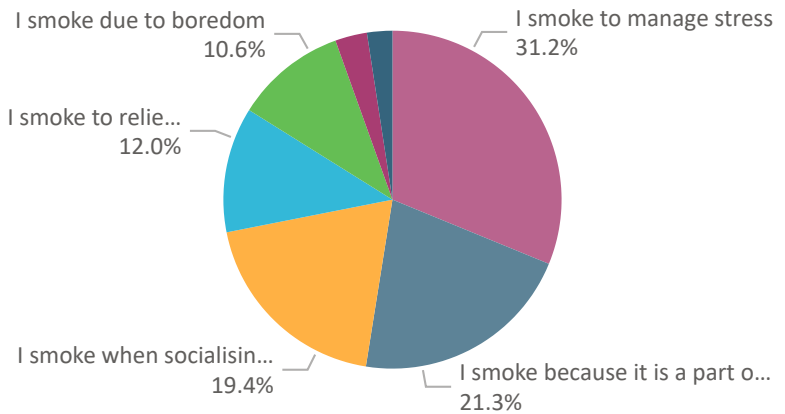
When do you usually consume tobacco or nicotine products?



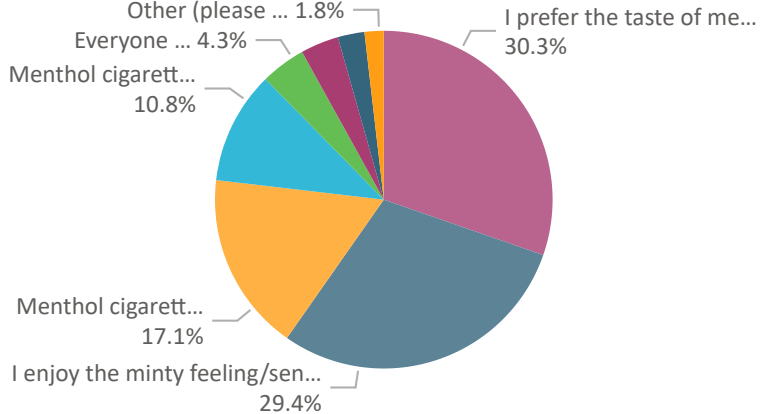
On what occasions do you usually consume tobacco or nicotine products?



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

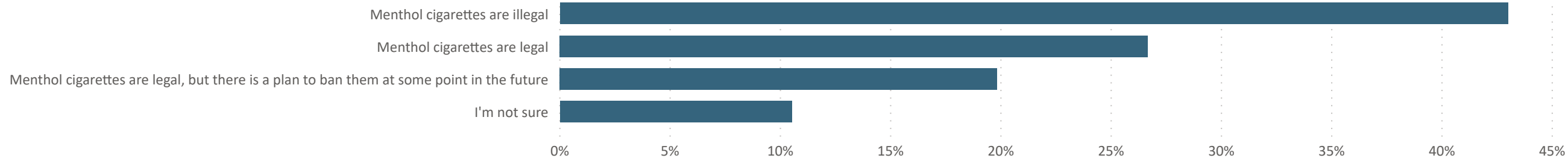
Select: Age

All

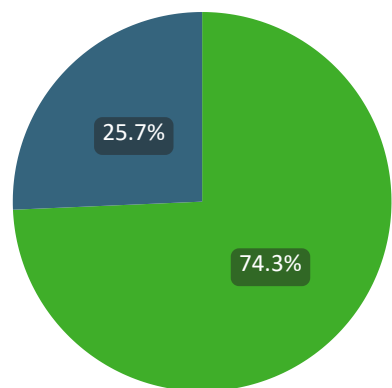
Number of respondents

6320

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

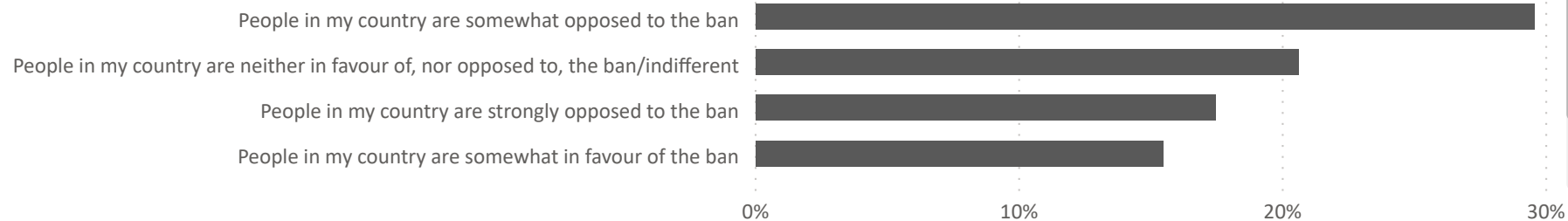


As stipulated by EU legislation, menthol cigarettes and hand-rolled tobacco products were banned on May 20th, 2020. Were you aware of this ban?

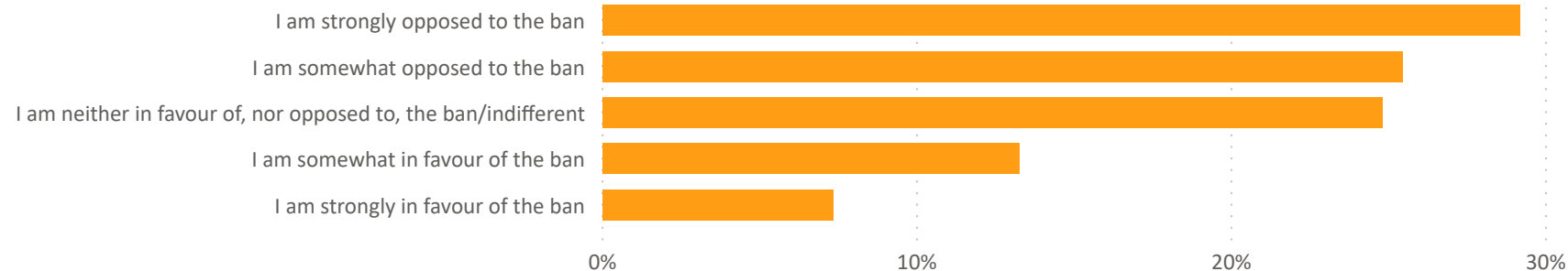


● Yes – I was aware of the ban on ... ● No – I was not aware of ...

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.



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



Menthol ban awareness and perception

Menu

Select: Country

Select: Gender

Select: Age

Number of respondents

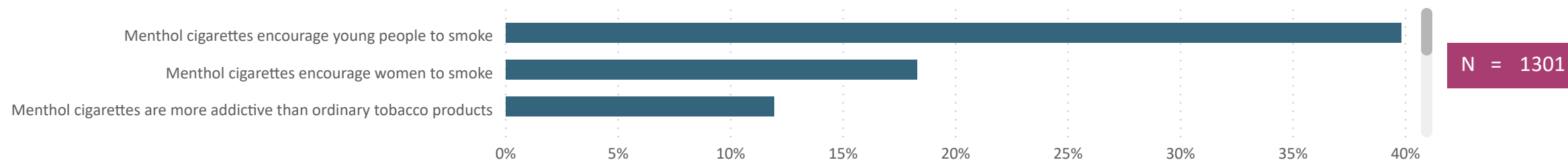
All

All

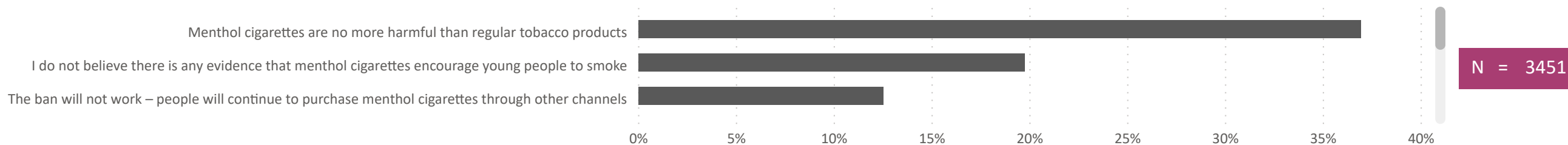
All

6320

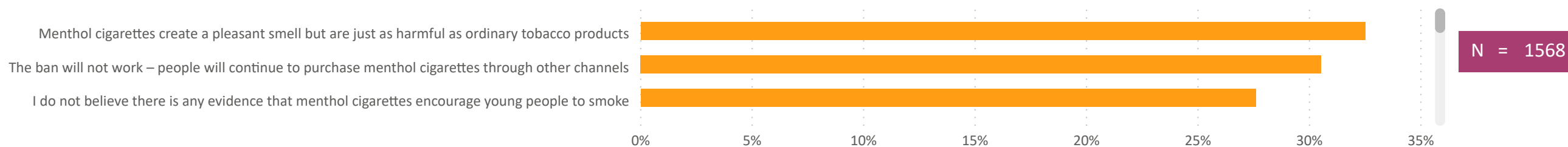
You said you were {"strongly in favour" / "somewhat in favour"} of the recent ban on menthol cigarettes. Which of the following best describes your main reason for supporting the ban?



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?



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 ban response

Menu

Select: Country

All

Select: Gender

All

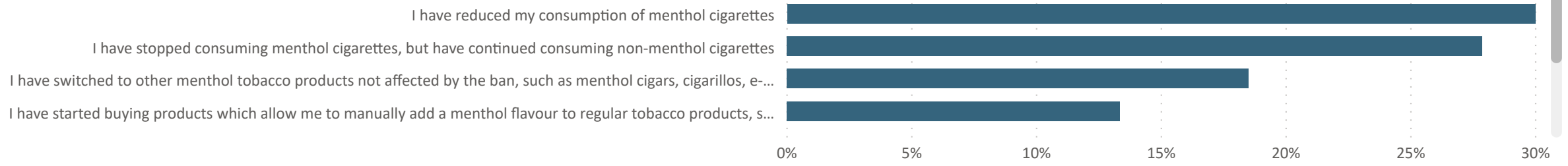
Select: Age

All

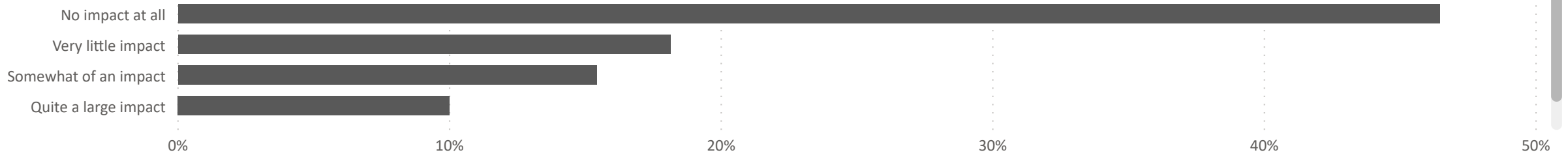
Number of respondents

6320

Thinking about the menthol ban, what action or actions did you take as a result of the recent ban on menthol cigarettes?

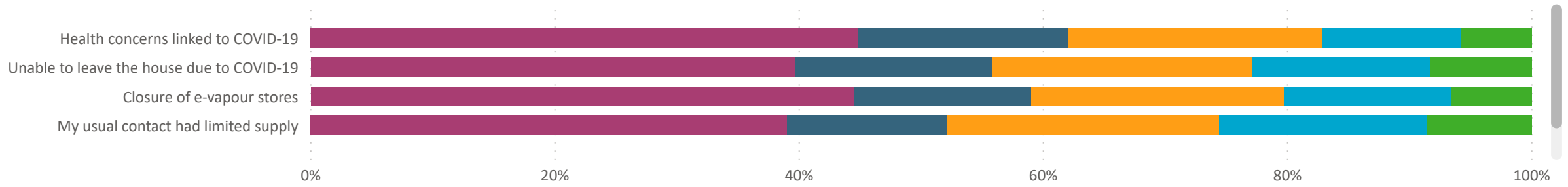


You said you have quit smoking completely as a result of the recent ban. How much of an impact did the recent Covid-19 pandemic have on your decision?



N = 480

How much of an impact did the following factors have on your decision?



N = 5840

● No impact at all ● Very little impact ● Somewhat of an impact ● Quite a large impact ● Very large impact

Menthol ban response

Menu

Select: Country

All

Select: Gender

All

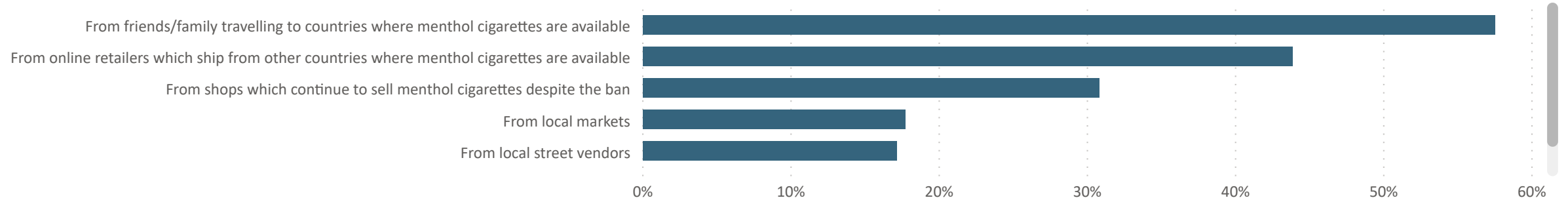
Select: Age

All

Number of respondents

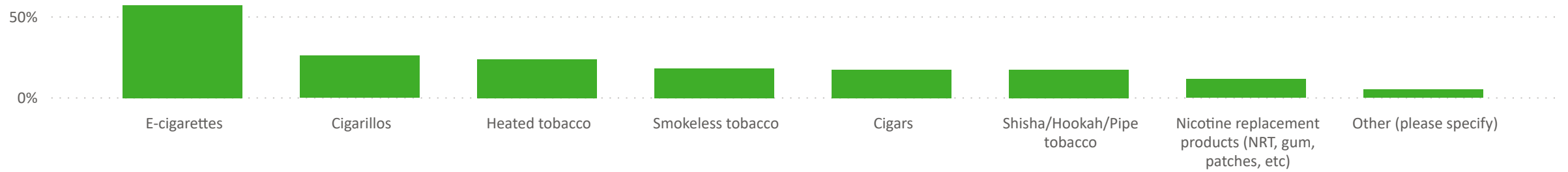
6320

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?



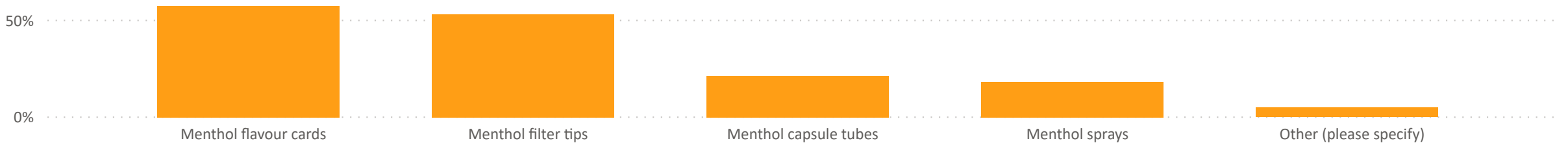
N = 835

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?



N = 1169

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?



N = 843

Menthol ban intended vs. actual response

Menu

Select: Country

All

Select: Gender

All

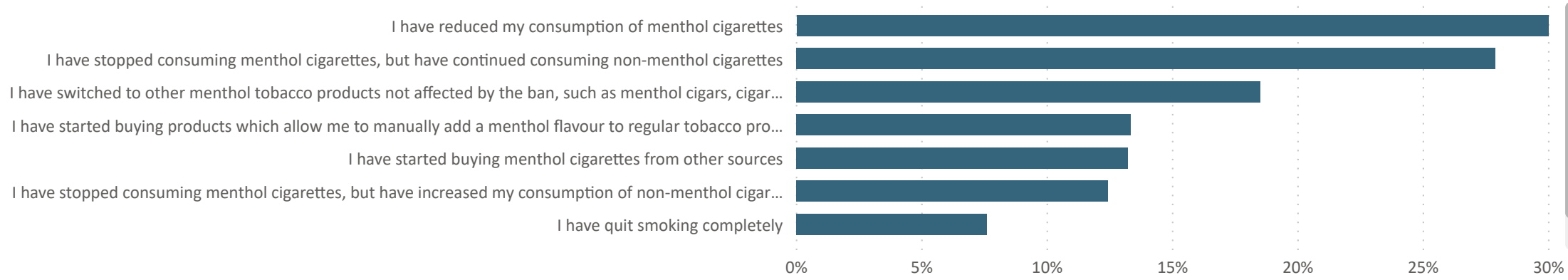
Select: Age

All

Number of respondents

6320

Thinking about the menthol ban, what action or actions did you take as a result of the recent ban on menthol cigarettes?



Actual

Select: Country

All

Select: Gender

All

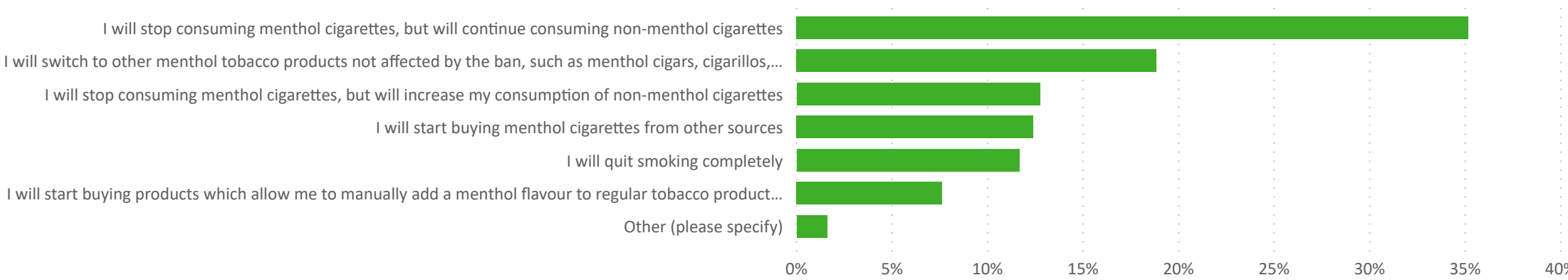
Select: Age

All

Number of respondents

6073

Thinking about the menthol ban, what action or actions are you likely to take as a result of the upcoming ban on menthol cigarettes?



Intended

Impact of COVID-19

Menu

Select: Country

Select: Gender

Select: Age

Number of respondents

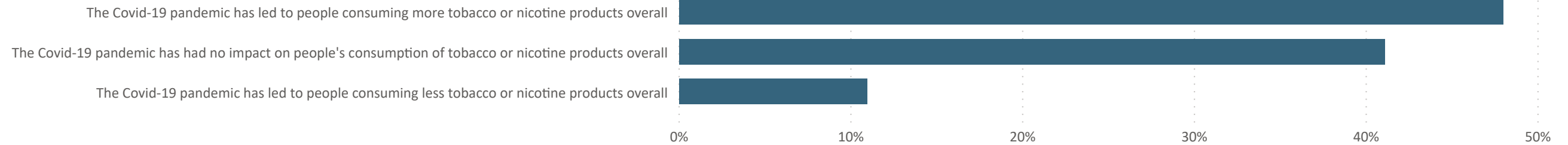
All

All

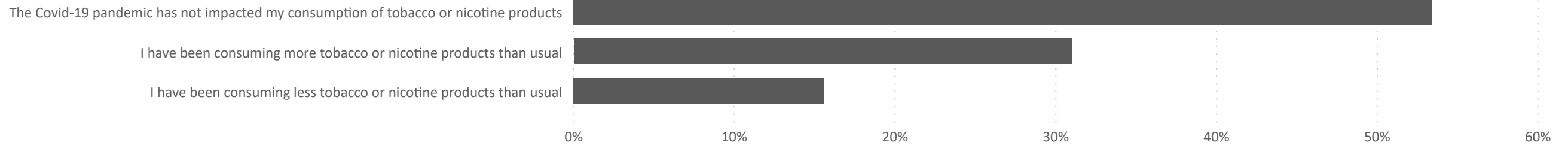
All

6320

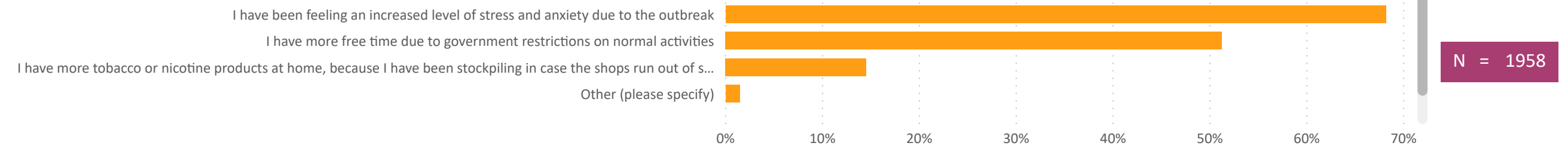
How do you think that the COVID-19 pandemic has impacted consumption of tobacco or nicotine products in your country overall?



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?



Impact of COVID-19

Menu

Select: Country

Select: Gender

Select: Age

Number of respondents

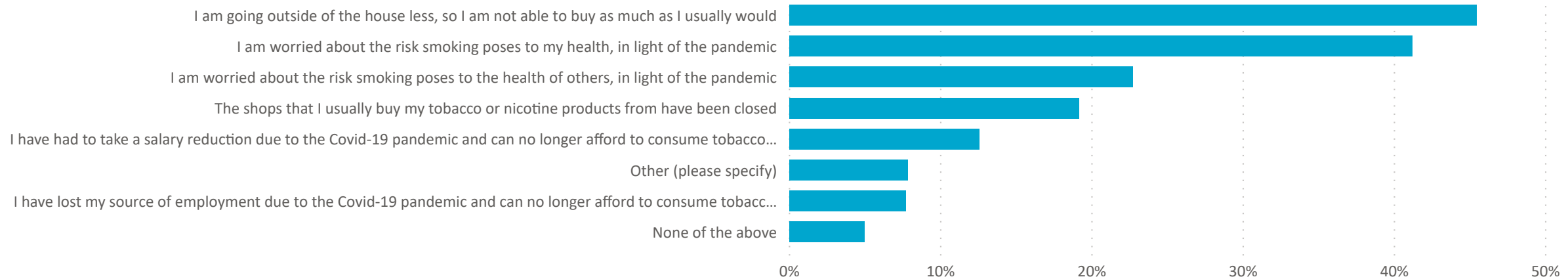
All

All

All

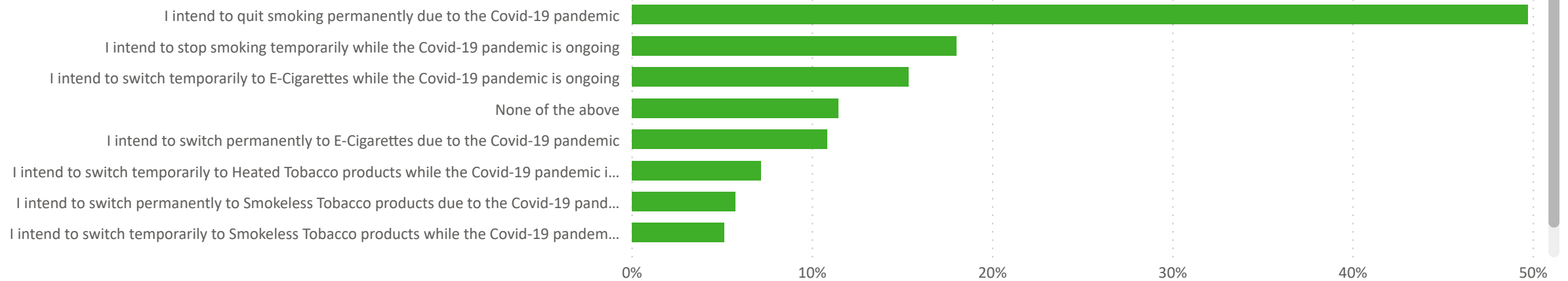
6320

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?



N = 986

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?



N = 489

Demographics

Menu

Select: Country

All

Select: Gender

All

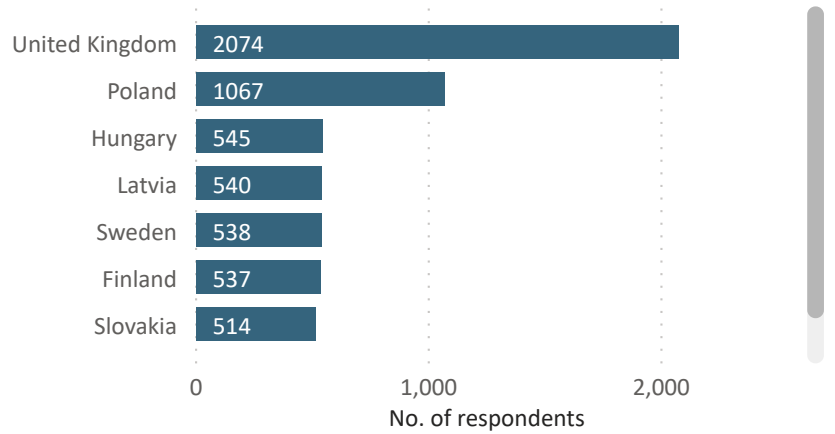
Select: Age

All

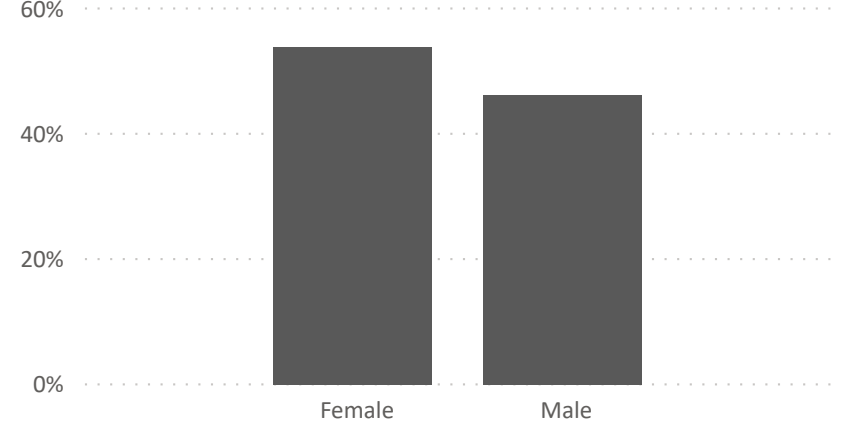
Number of respondents

6320

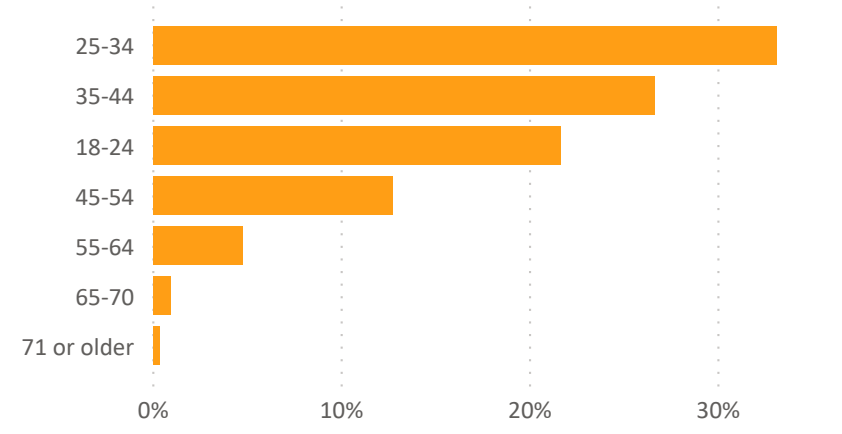
Respondents by country of residence



Respondents by gender

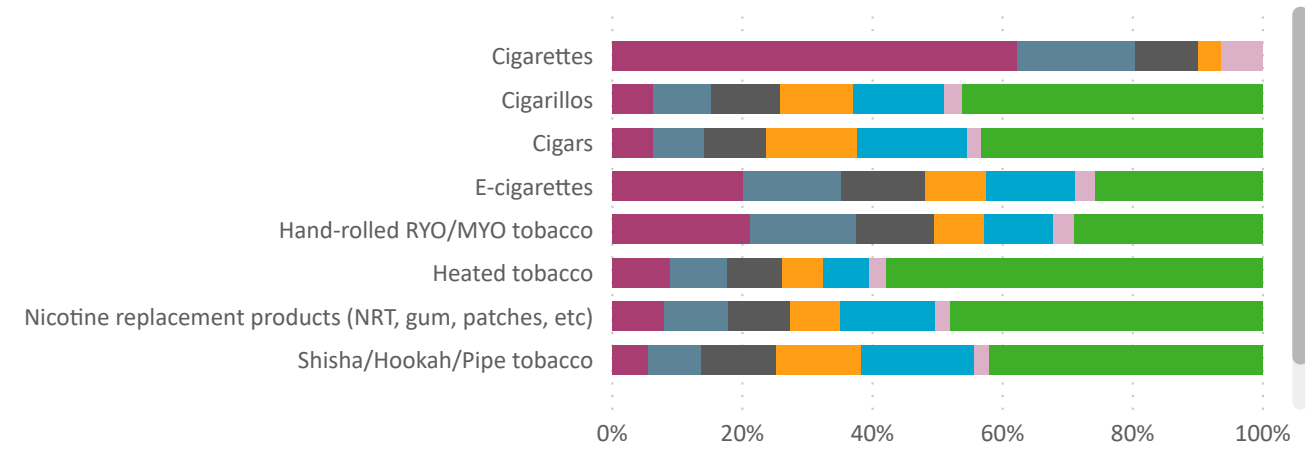


Respondents by age



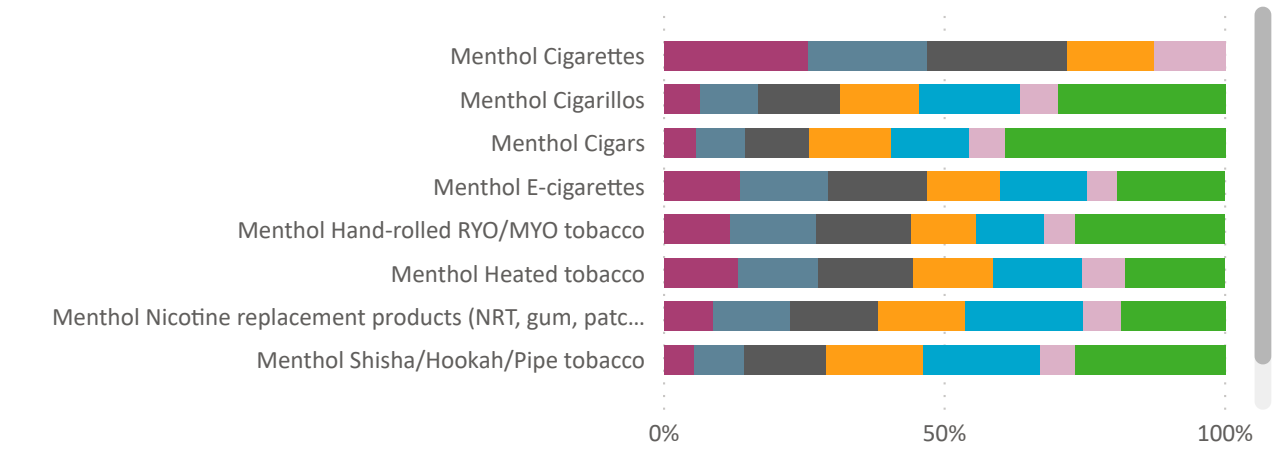
How frequently do you consume each of the following products?

● Daily (eg, ...
 ● Weekly (at ...
 ● Monthly (...
 ● Yearly (at l...
 ● More tha...
 ● I recently ...
 ● Never us...



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

● Daily (eg,...
 ● Weekly (at...
 ● Monthly (...
 ● Yearly (at l...
 ● More th...
 ● I recently ...
 ● Never u...



Demographics

Menu

Select: Country

All

Select: Gender

All

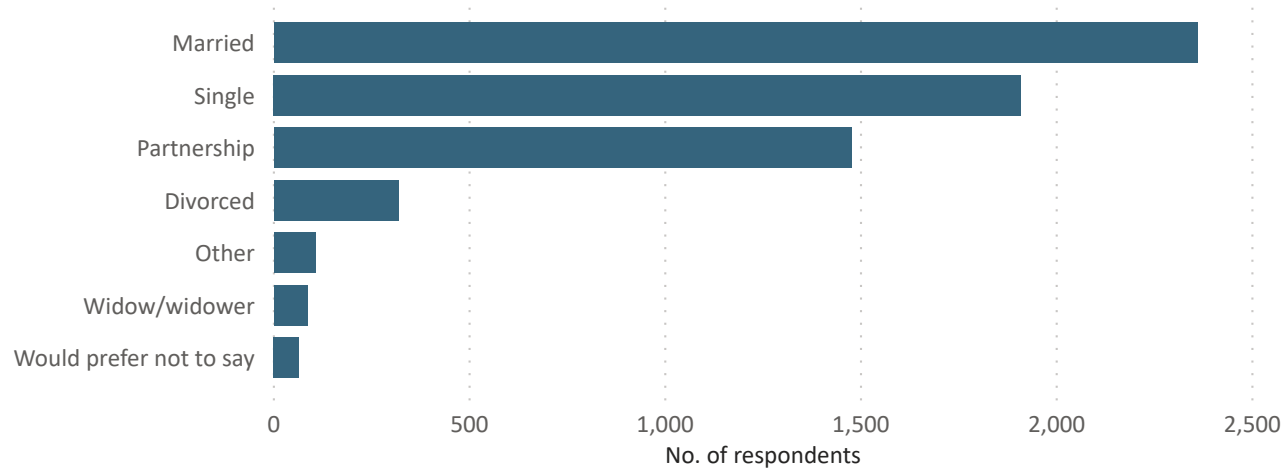
Select: Age

All

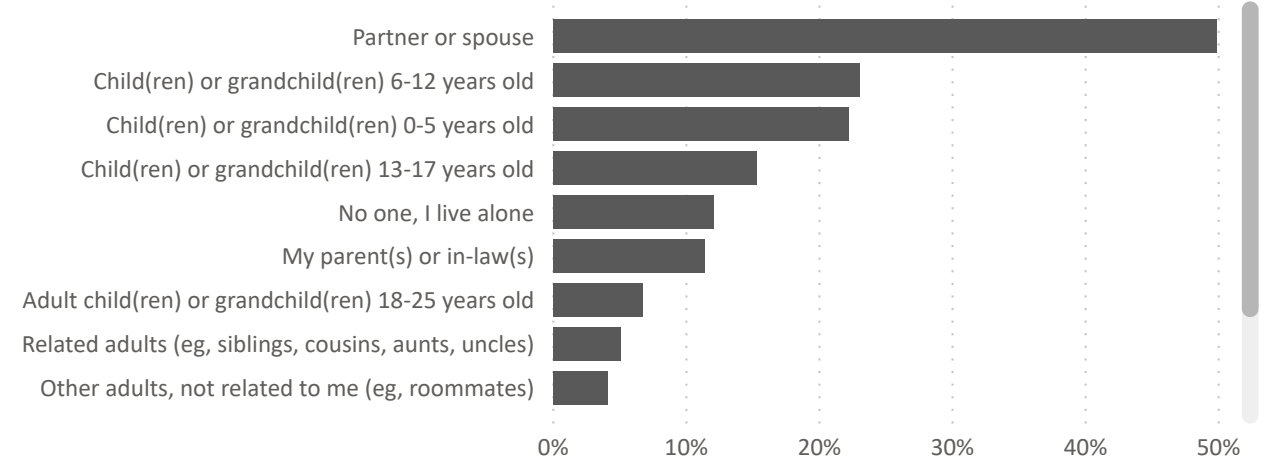
Number of respondents

6320

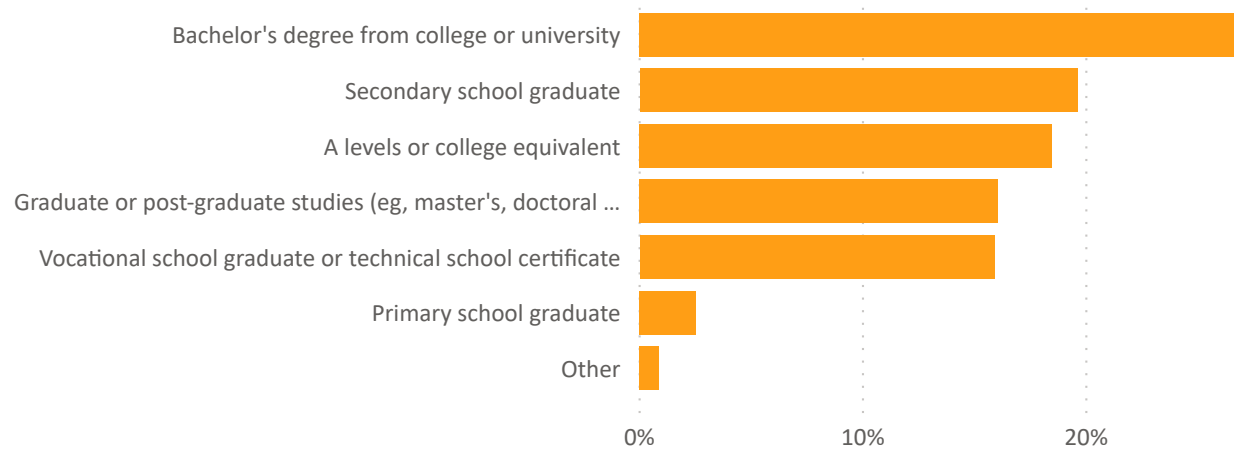
Respondents by current marital status



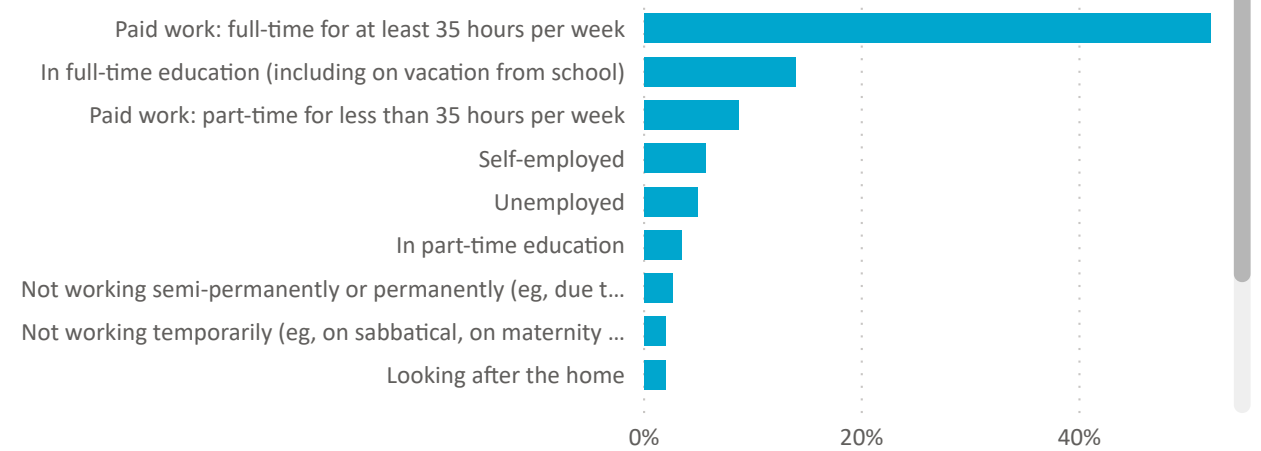
Who else lives in your household full-time?



Respondents by highest level of education



Respondents by primary work status



Demographics

Menu

Select: Country

Select: Gender

Select: Age

Number of respondents

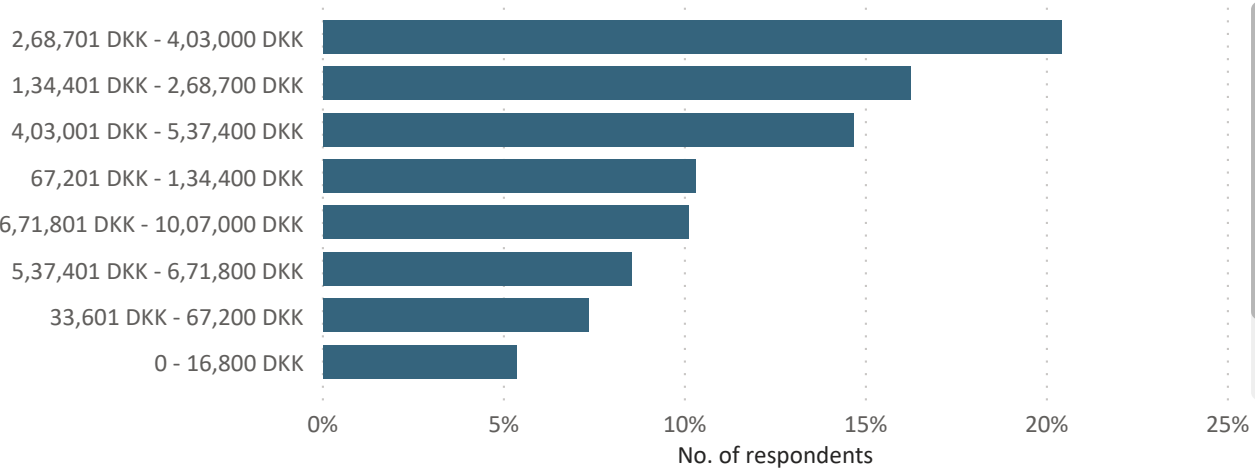
Denmark

All

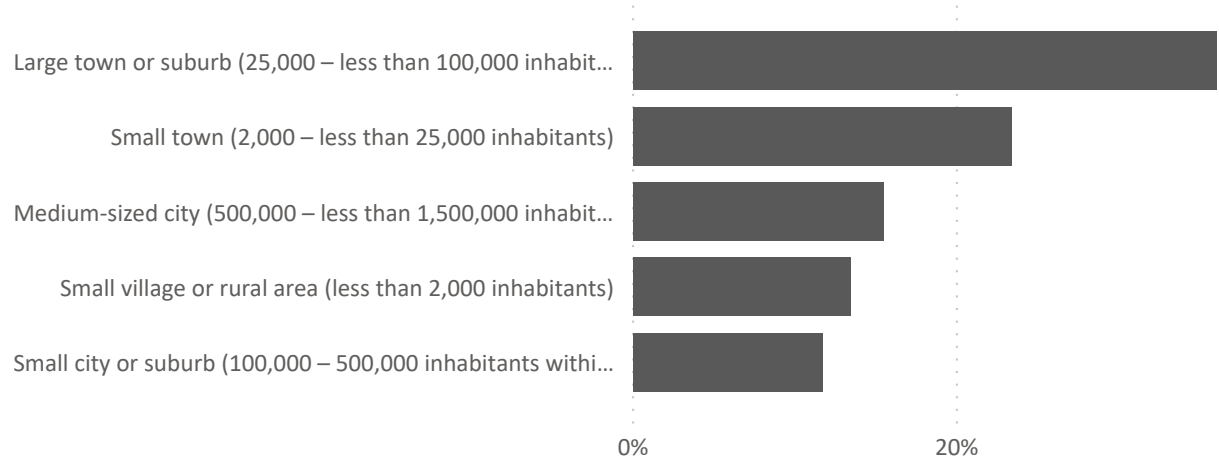
All

505

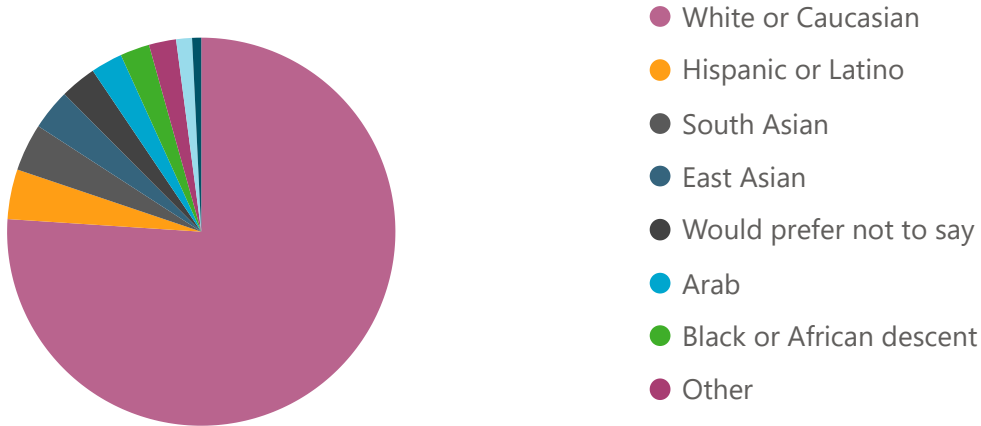
Respondents by household's total annual income



Which best describes where you currently live?



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



Respondents by race and/or ethnicity (United Kingdom)