



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

June 2020





Dashboard overview

Scope & background

Project background

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)*

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 segmentation/profiling analysis



Country overview

Menthol context

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Current menthol consumption

Consumer profile

Menthol ban awareness and perception: Page 1

Menthol ban awareness and perception: Page 2

Menthol ban intended response

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Demographics: Page 2

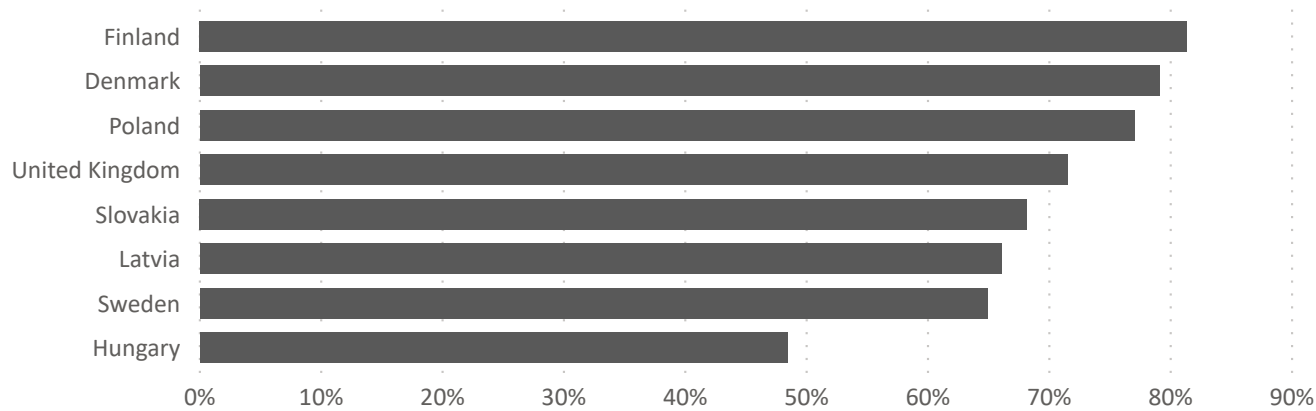
Demographics: Page 3

Country overview

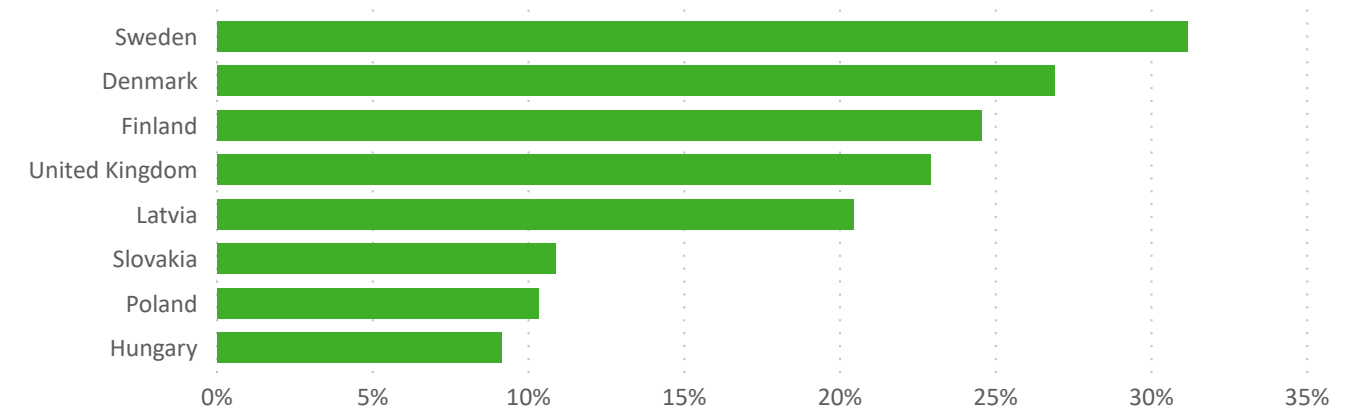
Number of respondents

6073

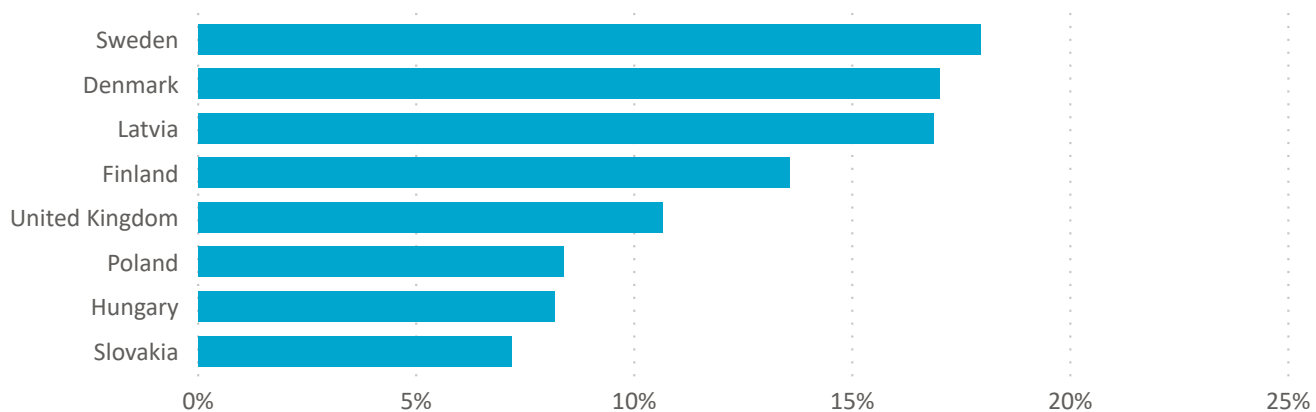
Share of respondents by country, saying "Yes", when asked whether they were aware of the upcoming ban on menthol tobacco products in the EU, starting from May 20th, 2020



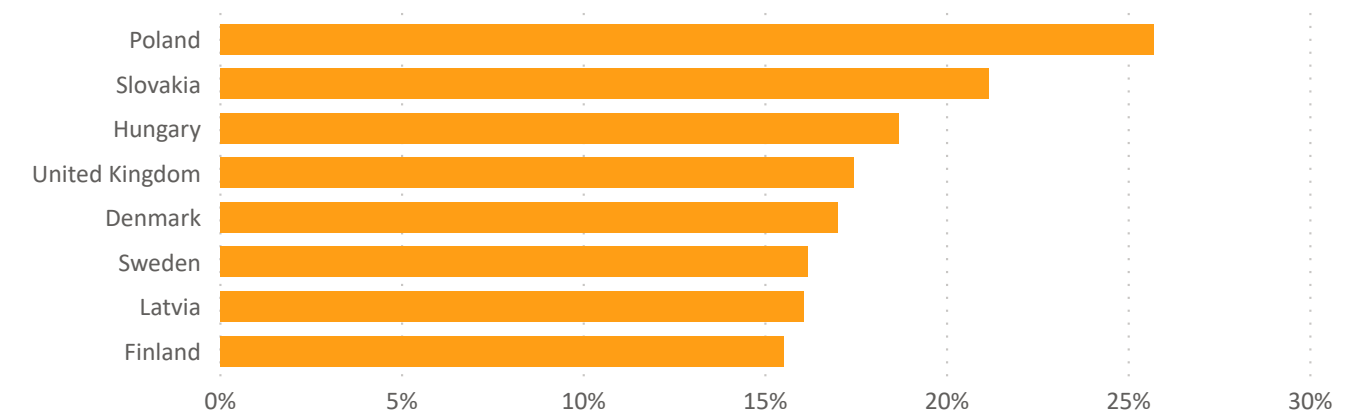
Share of respondents by country, who are either "strongly in favour" or "somewhat in favour" of the upcoming ban on menthol tobacco products in the EU, starting May 20th, 2020



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

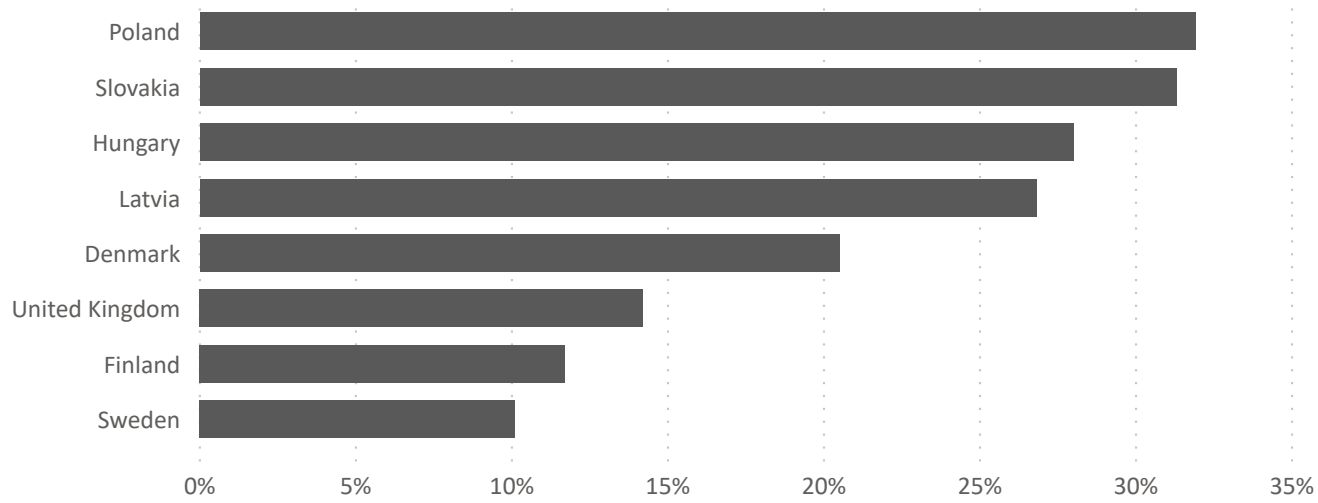


Share of respondents by country, saying "I will switch to other menthol tobacco or nicotine products", when asked about their single most likely action as a result of the upcoming ban

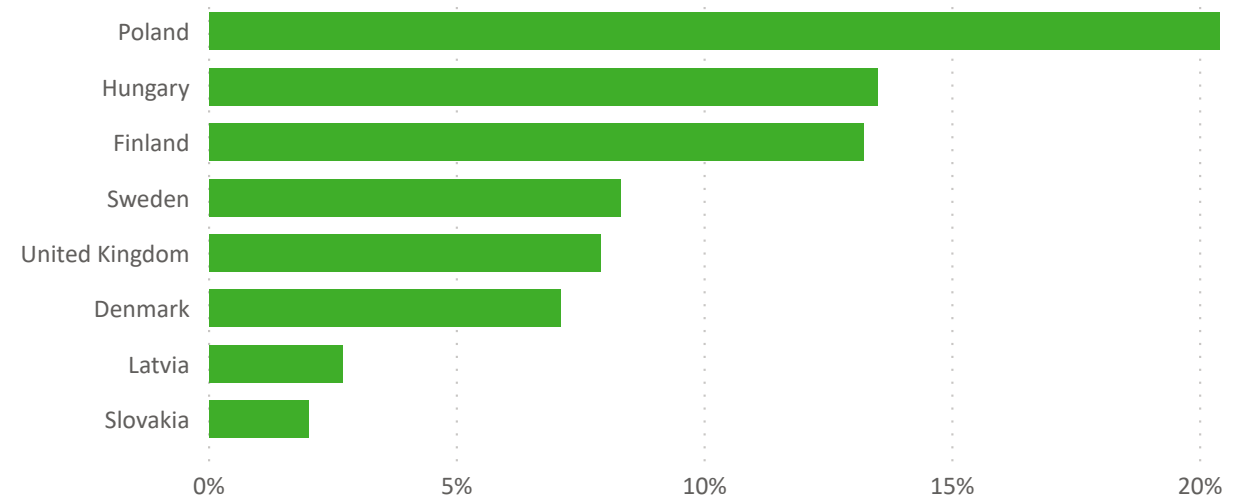


Menthol context

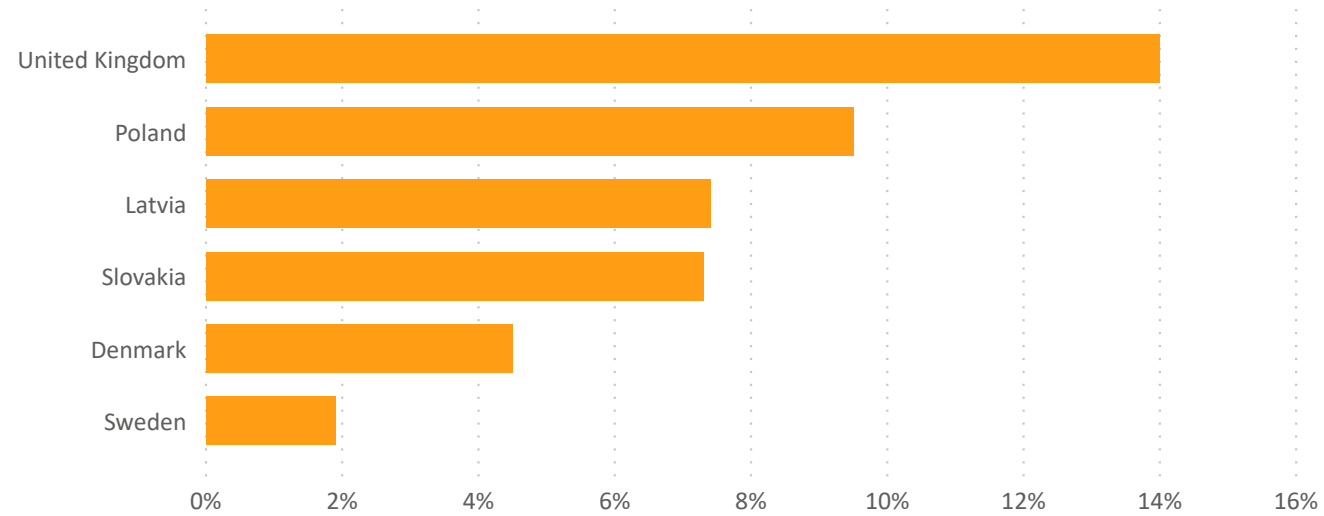
Smoking prevalence per country, 2019



Share of menthol cigarettes per market, 2019



Share of capsule cigarettes per market, 2019



Current tobacco consumption

Select: Country

Select: Gender

Select: Age

Select: Frequency

Number of respondents

All

All

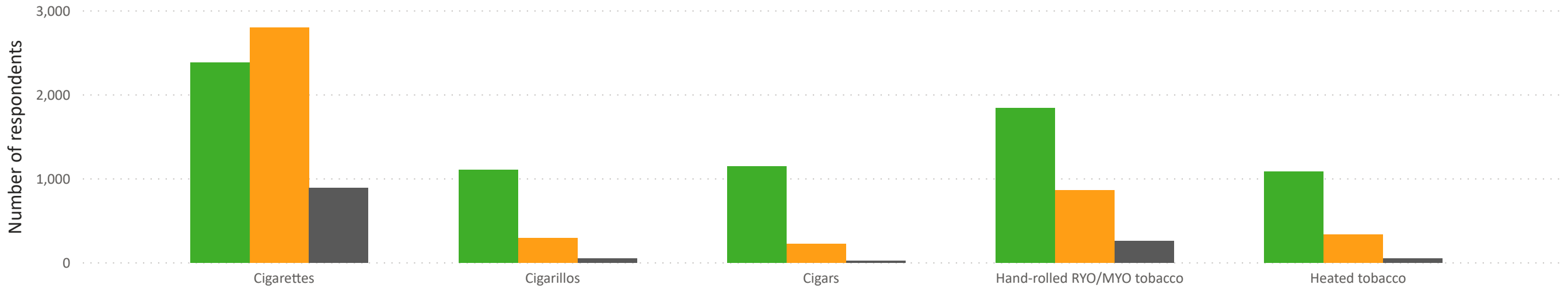
All

All

6073

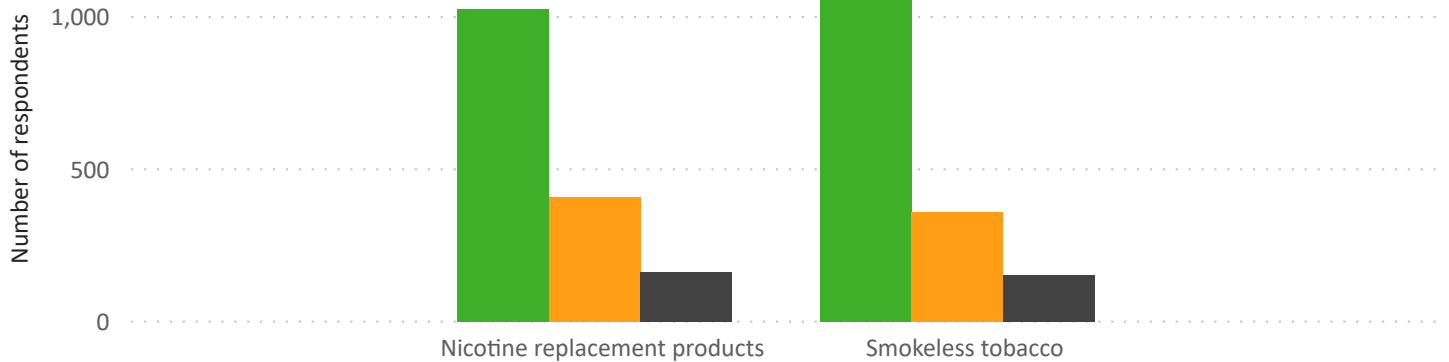
How many of each of the following product types do you typically consume? (Based on chosen frequency)

Frequencies ● 1-5 sticks ● 6-19 sticks ● 20+ sticks



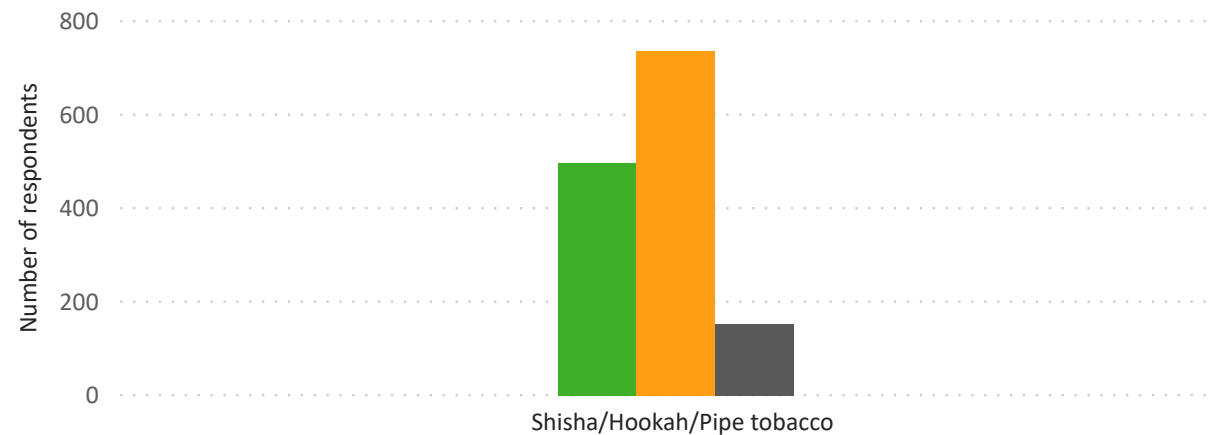
How many portions of each of the following products do you typically consume? (Based on chosen frequency)

Frequencies ● 1-4 portions ● 5-9 portions ● 10+ portions



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

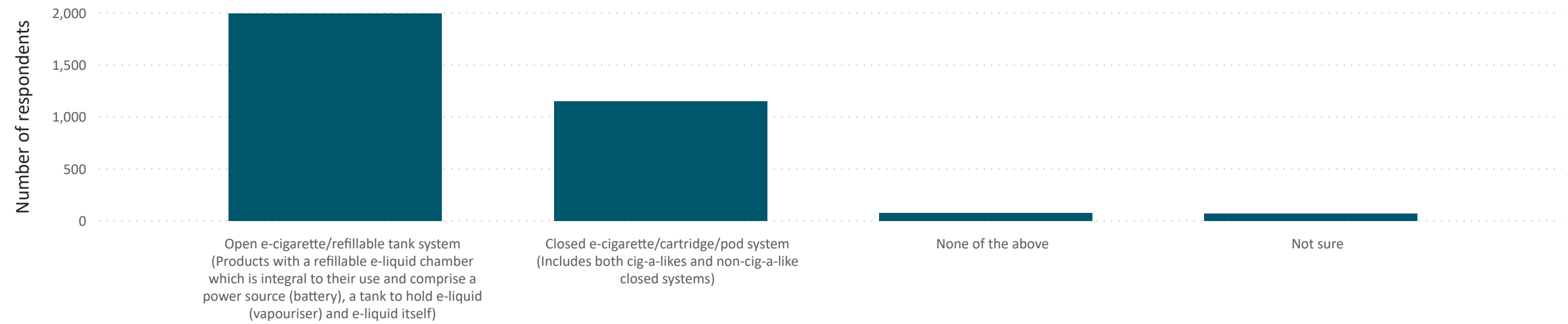
Frequencies ● 0-1 sessions ● 2-3 sessions ● 4+ sessions



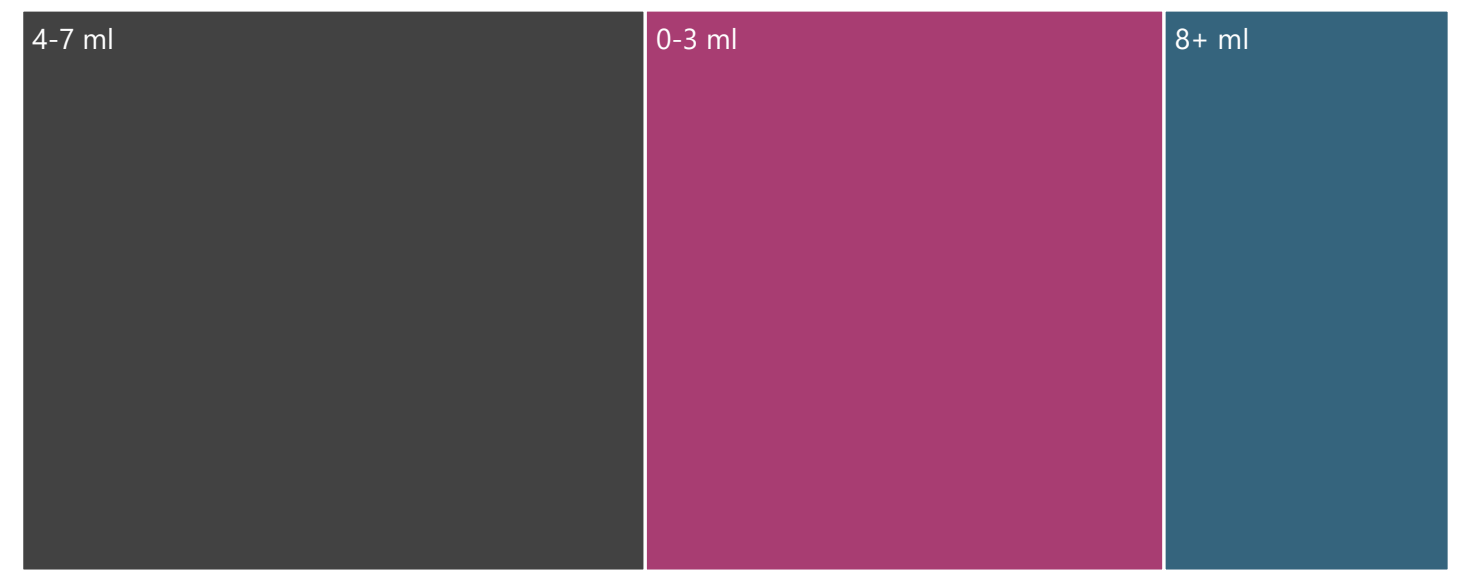
Current tobacco consumption

Select: Country Select: Gender Select: Age Select: Frequency 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

Select: Gender

Select: Age

Number of respondents

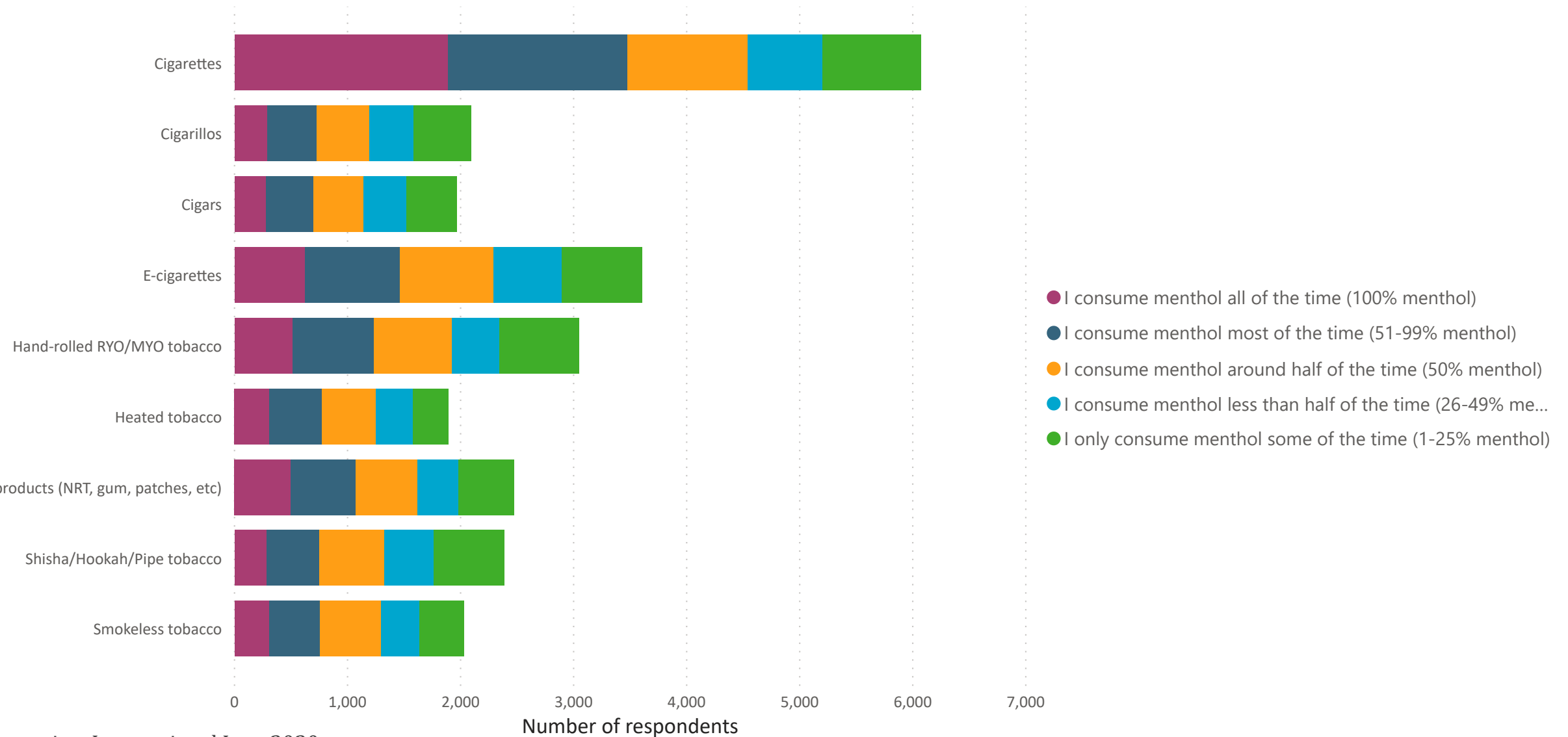
All

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6073

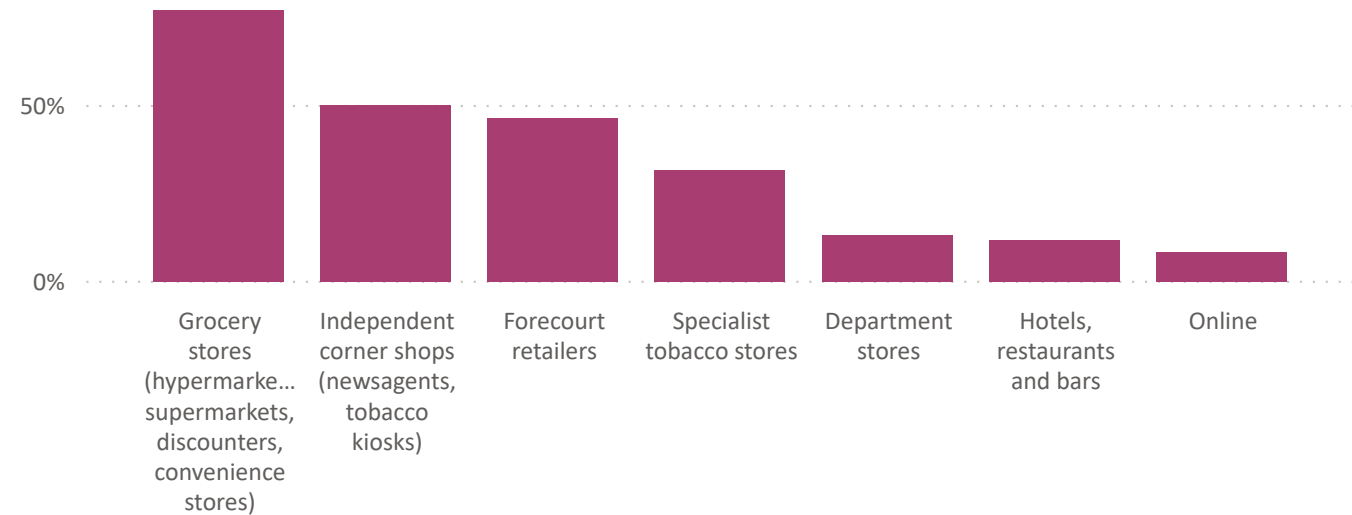
Respondents by how much of their current tobacco consumption is menthol, versus non-menthol



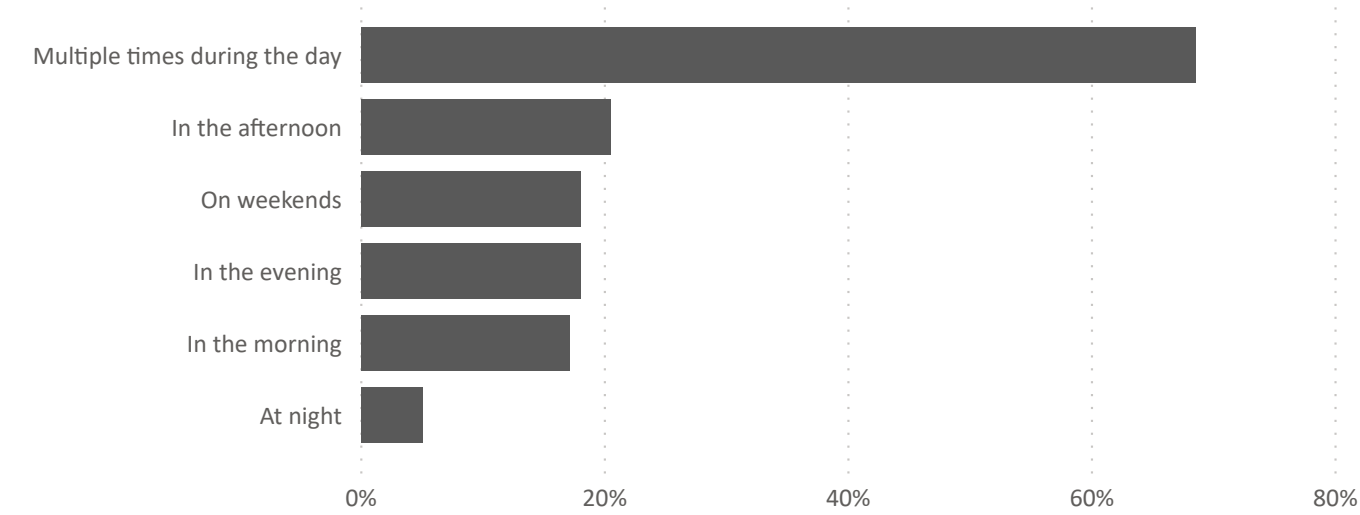
Consumer profile

Select: Country Select: Gender Select: Age Select: Choice of tobacco product Number of respondents **6073**

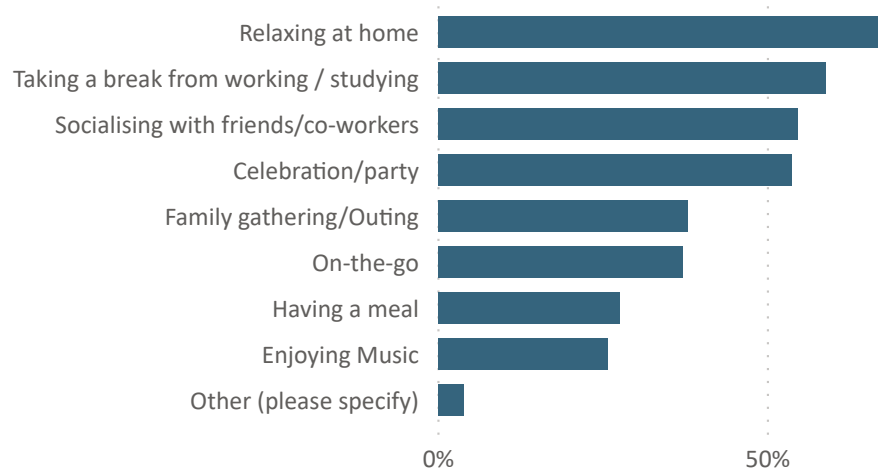
Where do you usually purchase your tobacco or nicotine products from?



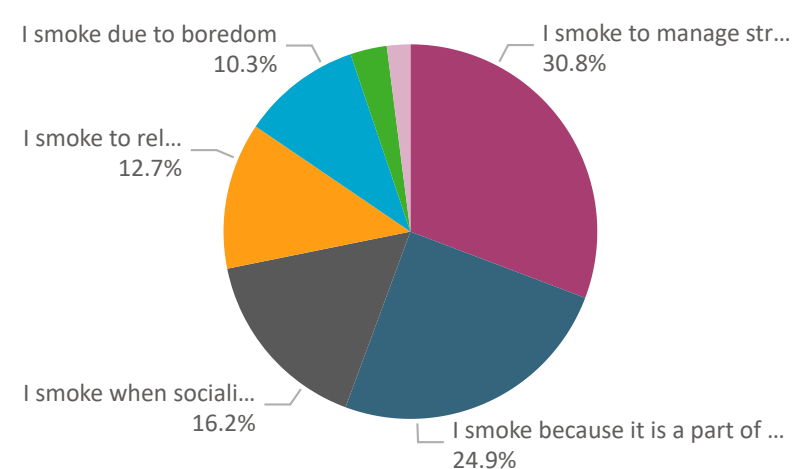
When do you usually consume tobacco or nicotine products?



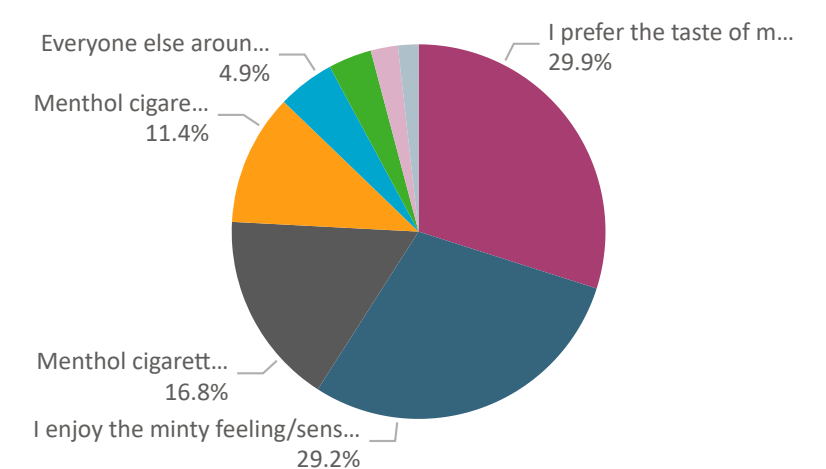
On what occasions do you usually consume tobacco or nicotine products?



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

Select: Country

Select: Gender

Select: Age

Number of respondents

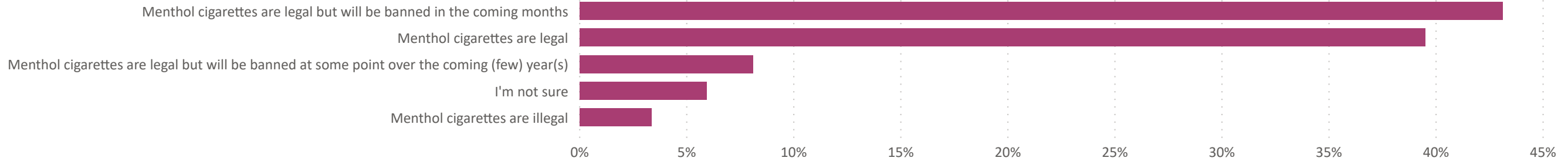
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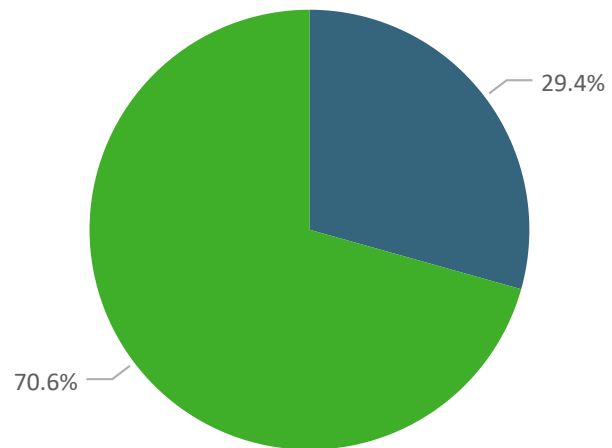
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What is the current status of menthol cigarettes in your country?

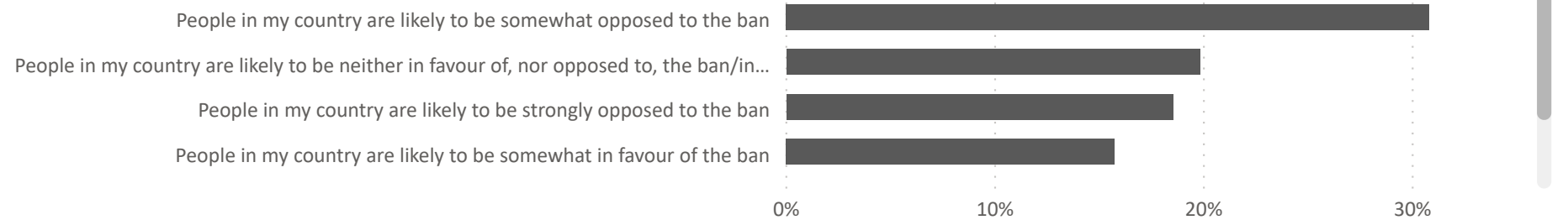


As stipulated by EU legislation, menthol cigarettes and hand-rolled tobacco products will be banned on May 20th, 2020. Were you aware of this upcoming ban?

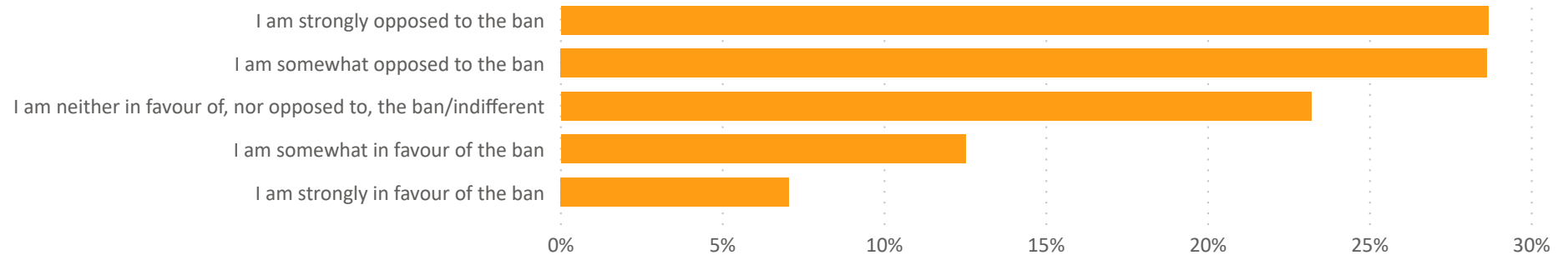


● No – I was not aware of the upcoming ban ● Yes – I was aware of the upcoming ban

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.



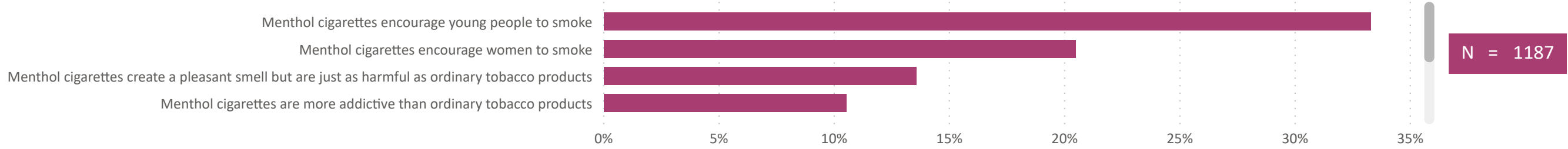
Which of the below statements best describes your own stance on the upcoming ban on menthol cigarettes?



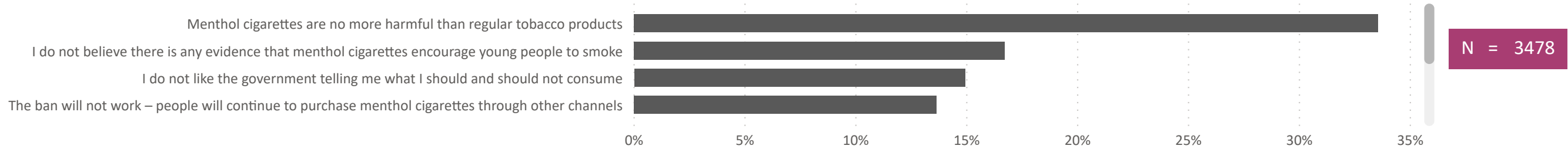
Menthol ban awareness and perception

Select: Country Select: Gender Select: Age Number of respondents **6073**

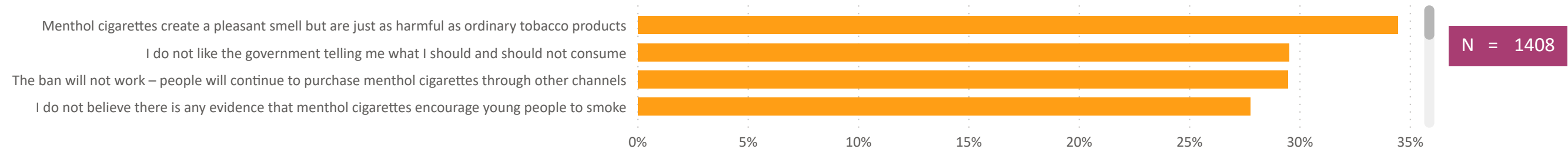
You said you were {"strongly in favour" / "somewhat in favour"} of the upcoming ban on menthol cigarettes. Which of the following best describes your main reason for supporting the ban?



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

Select: Country

Select: Gender

Select: Age

Number of respondents

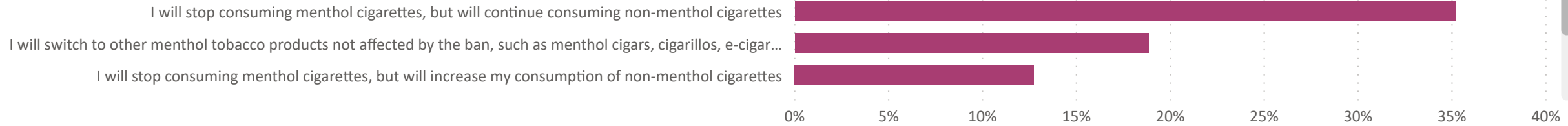
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What single action are you most likely to take as a result of the upcoming ban on menthol cigarettes?

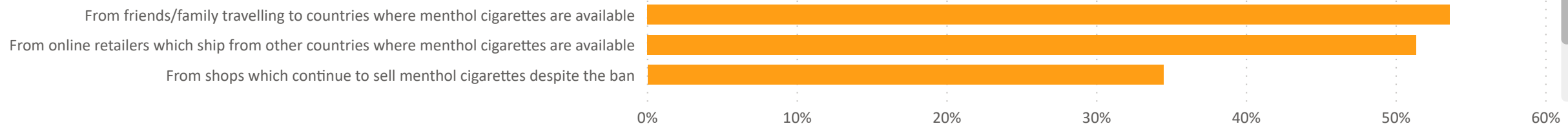


You said you plan to quit smoking completely as a result of the upcoming ban. How much of an impact has the recent Covid-19 pandemic had on your decision?



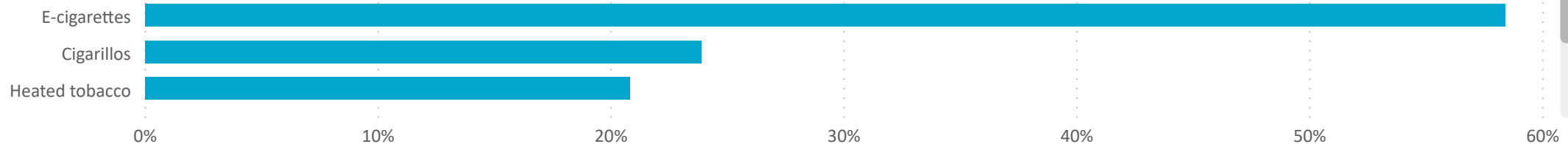
N = 708

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

Impact of COVID-19

Select: Country

All



Select: Gender

All



Select: Age

All



Number of respondents

6073

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

0% 5% 10% 15% 20% 25% 30% 35% 40% 45%

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

0% 10% 20% 30% 40% 50% 60%

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 s...
- Other (please specify)
- None of the above

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

N = 1790

Impact of COVID-19

Select: Country

Select: Gender

Select: Age

Number of respondents

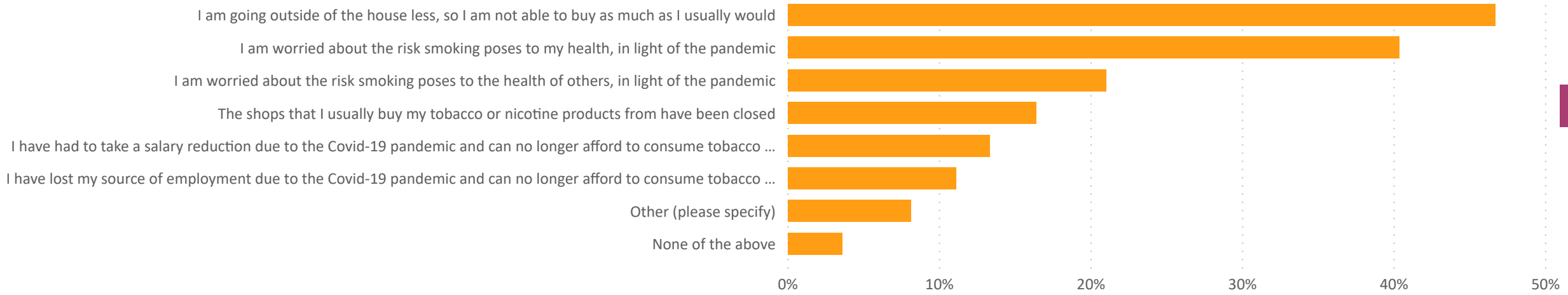
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All

All

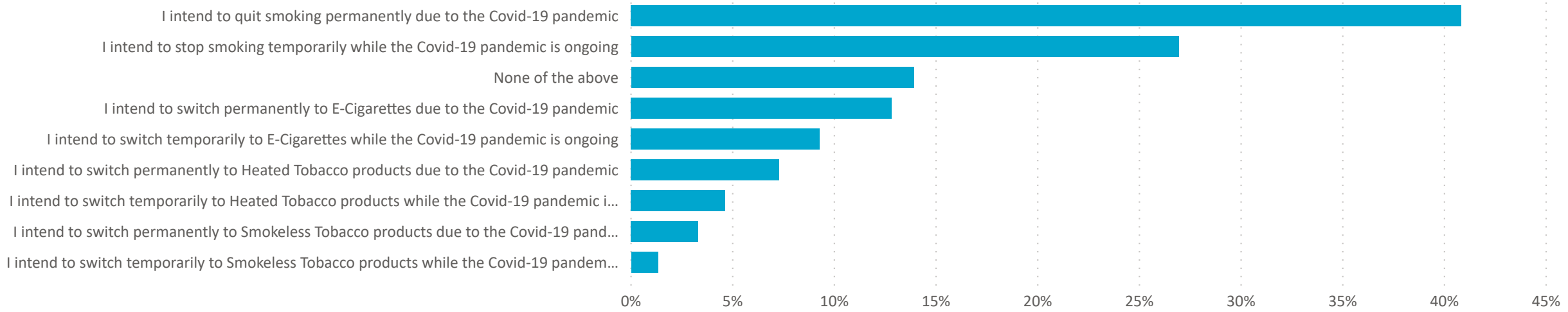
6073

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?



N = 947

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 = 453

Demographics

Select: Country

Select: Gender

Select: Age

Number of respondents

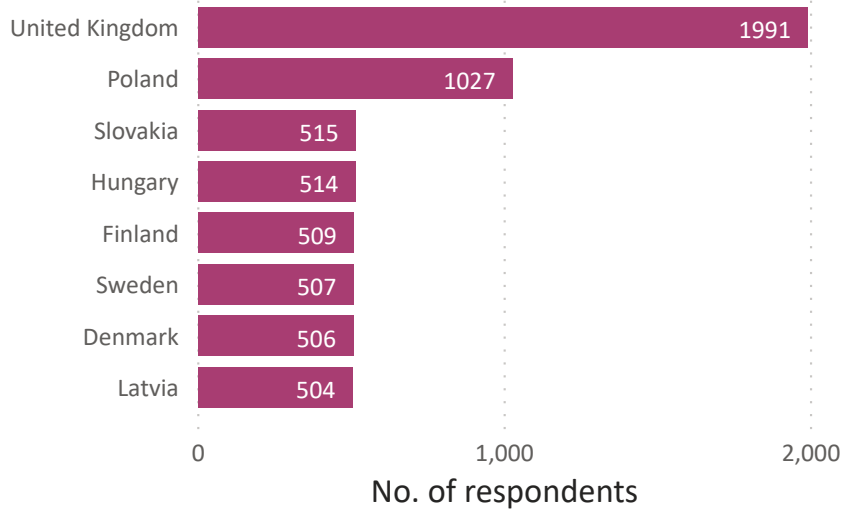
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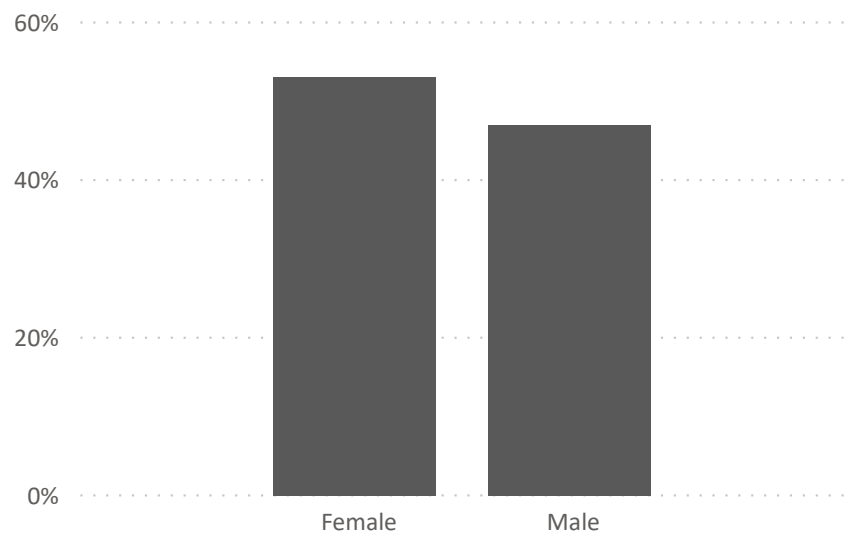
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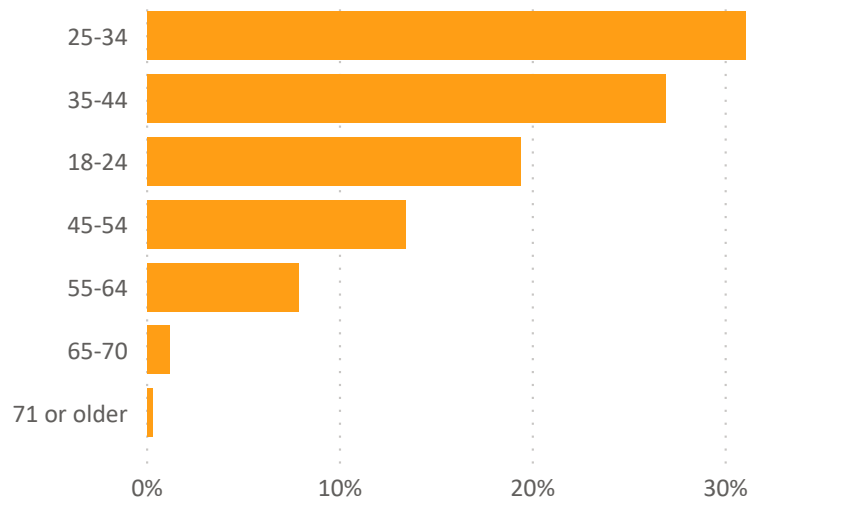
Respondents by country of residence



Respondents by gender

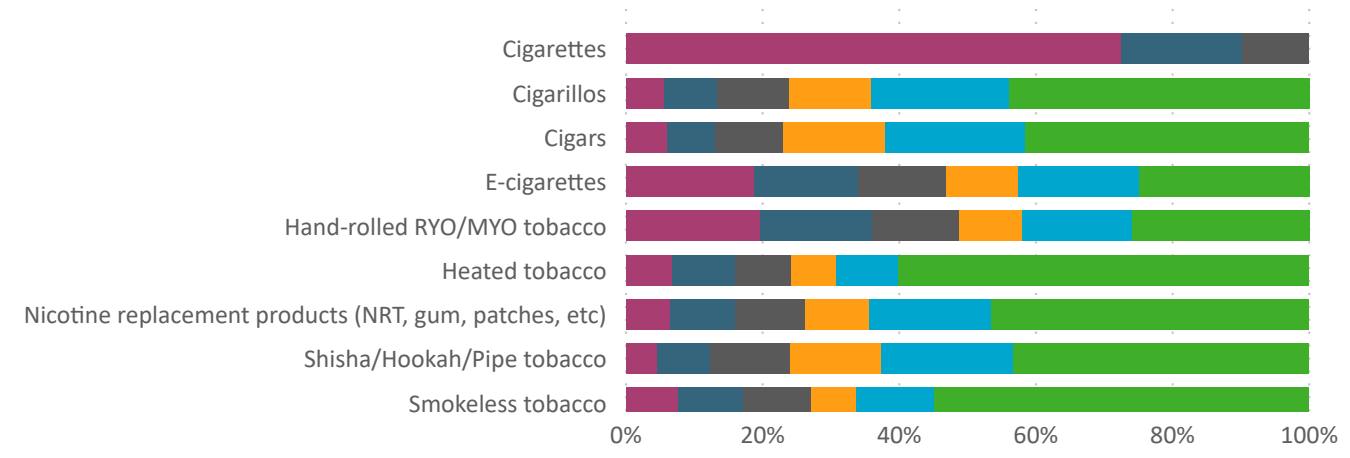


Respondents by age



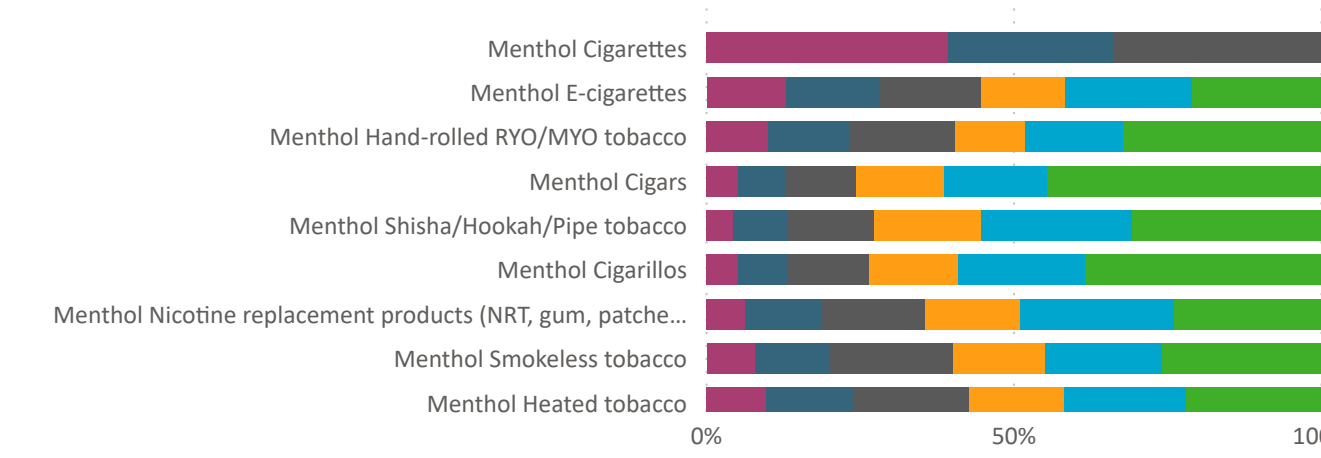
How frequently do you consume each of the following products?

● Daily (eg, at le...
 ● Weekly (at le...
 ● Monthly (at l...
 ● Yearly (at le...
 ● More than ...
 ● Never used



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

● Daily (eg, at le...
 ● Weekly (at le...
 ● Monthly (at l...
 ● Yearly (at le...
 ● More than ...
 ● Never used



Demographics

Select: Country

All

Select: Gender

All

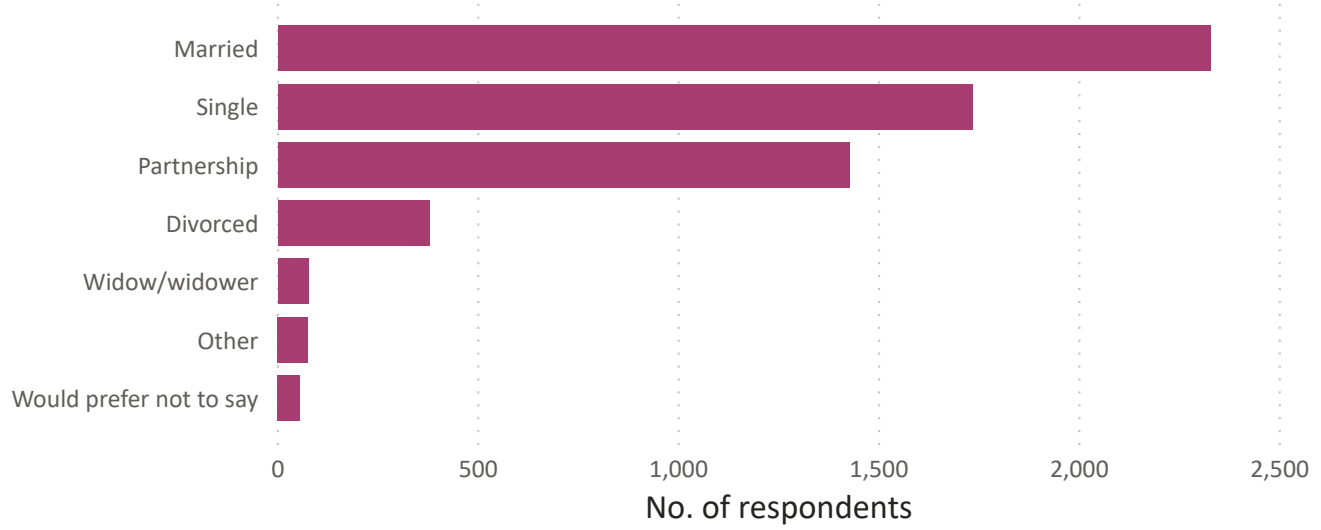
Select: Age

All

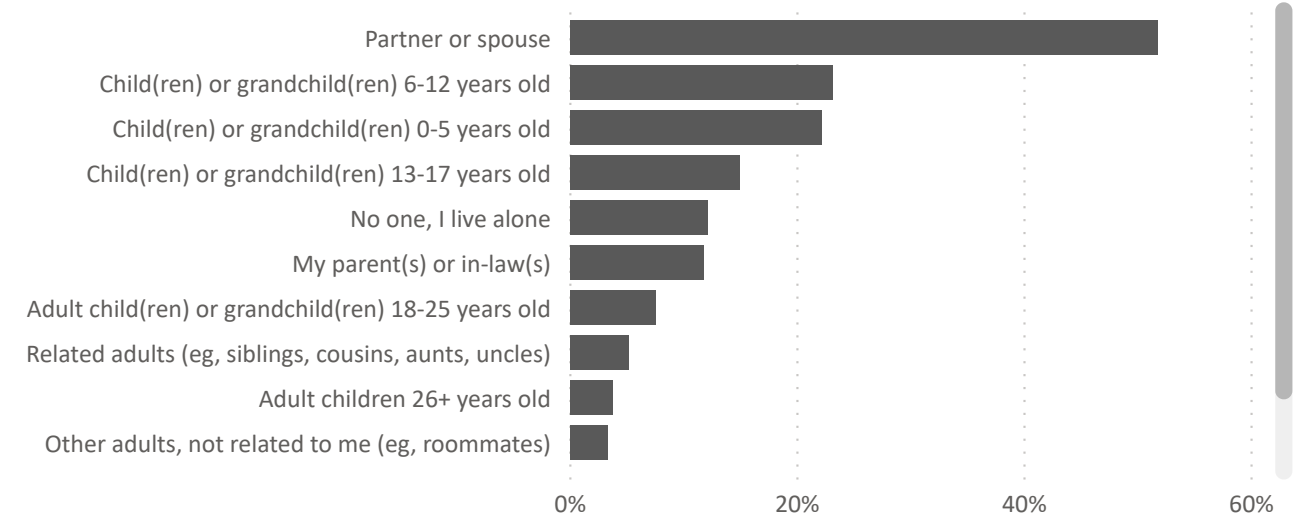
Number of respondents

6073

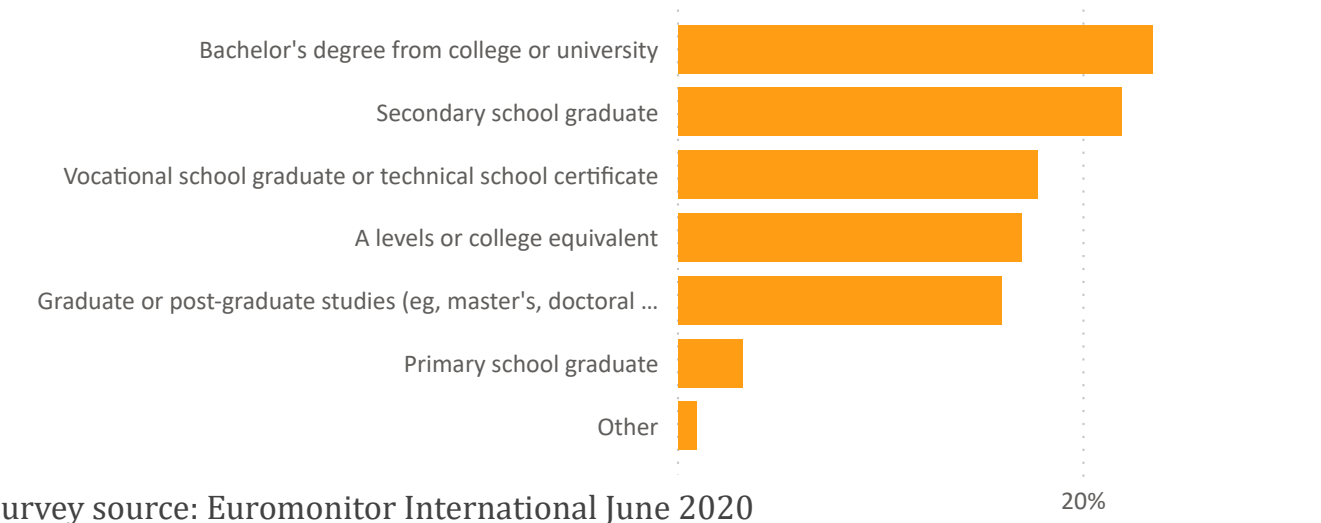
Respondents by current marital status



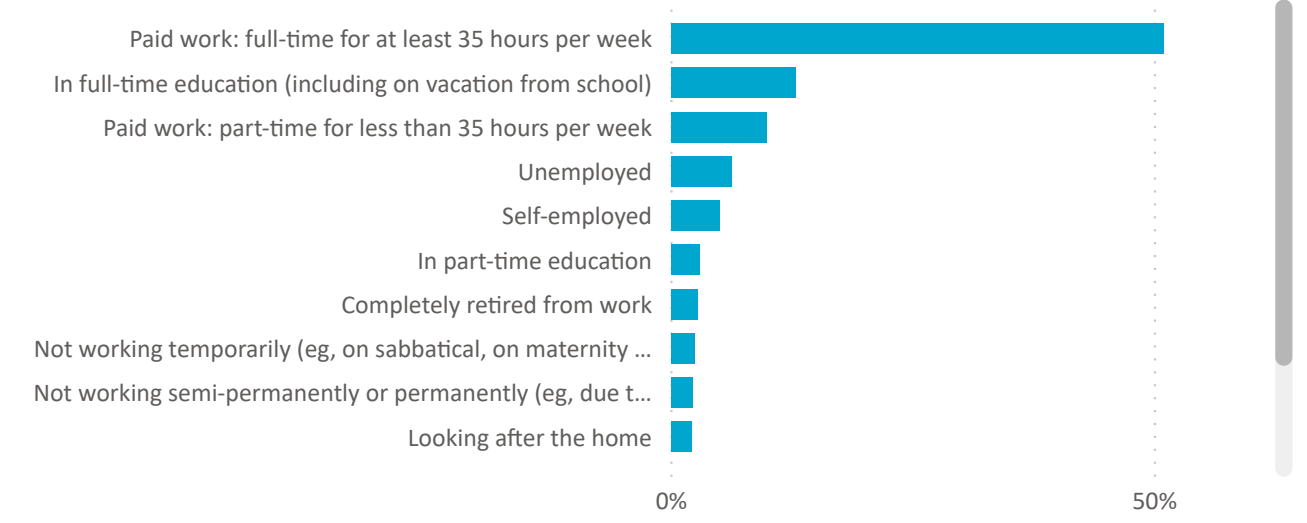
Who else lives in your household full-time?



Respondents by highest level of education



Respondents by primary work status



Demographics

Select: Country

All

Select: Gender

All

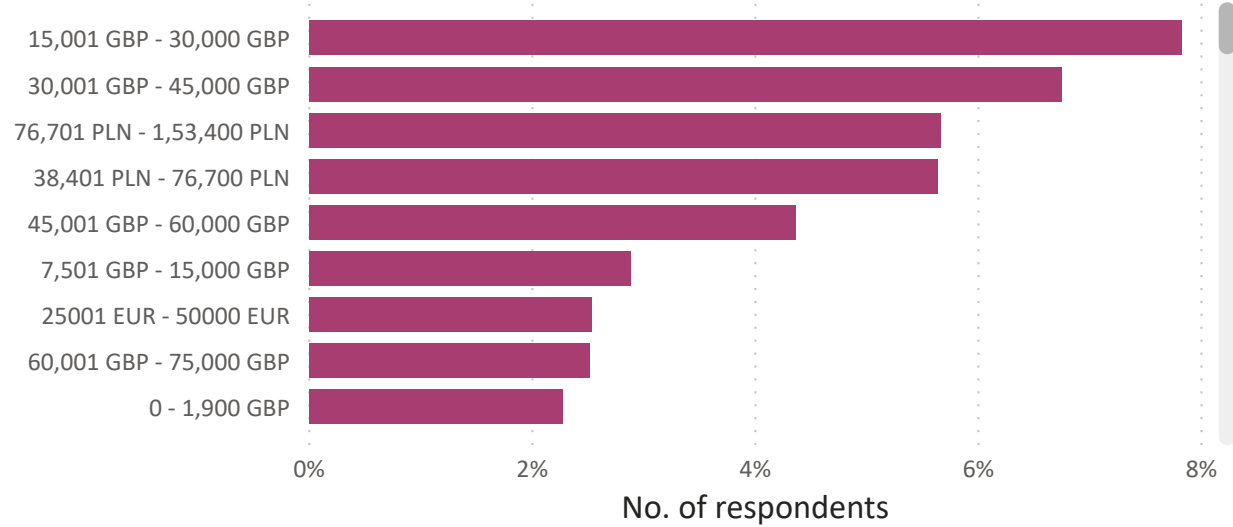
Select: Age

All

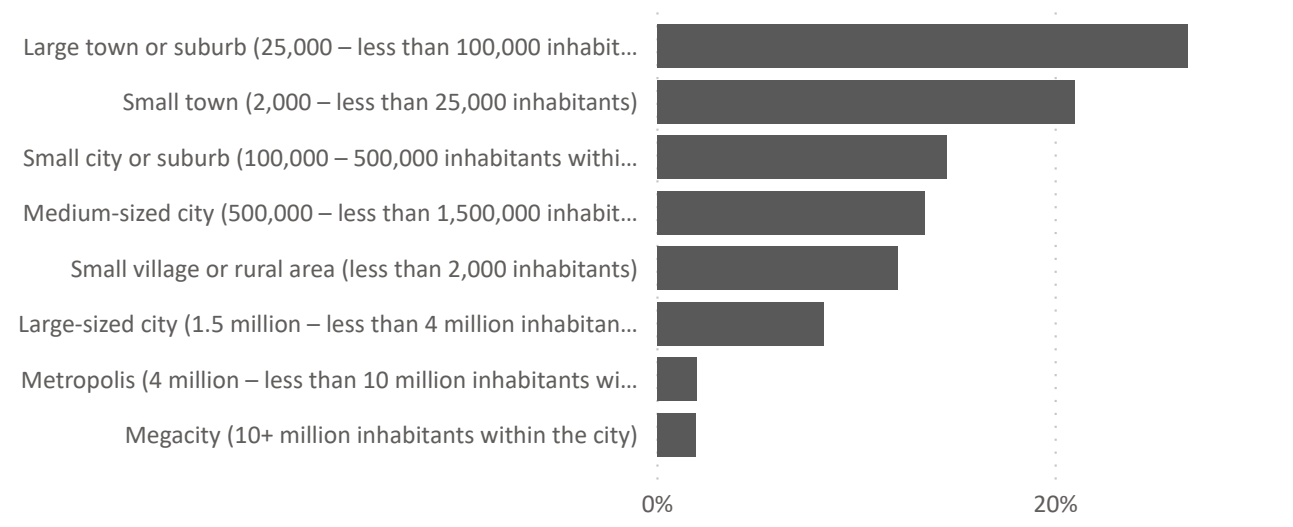
Number of respondents

6073

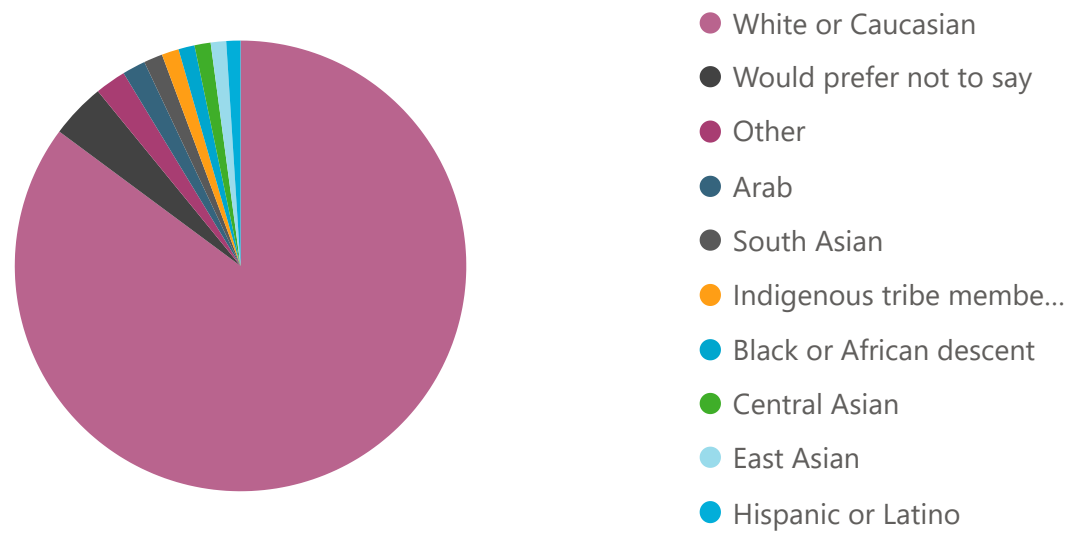
Respondents by household's total annual income



Which best describes where you currently live?



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



Respondents by race and/or ethnicity (United Kingdom)

