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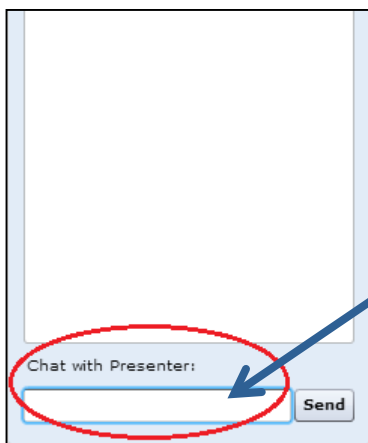
Menthol and Flavour Ban Evaluation Results

Presented by:

Dr. Rob Schwartz, Robert Nugent and Dr. Michael Chaiton

September 19, 2017

Submitting comments or questions



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Today's speakers



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Today's speakers



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Today's speakers



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Industry Tactics in Preparing and Responding to the Menthol Ban

Rob Schwartz

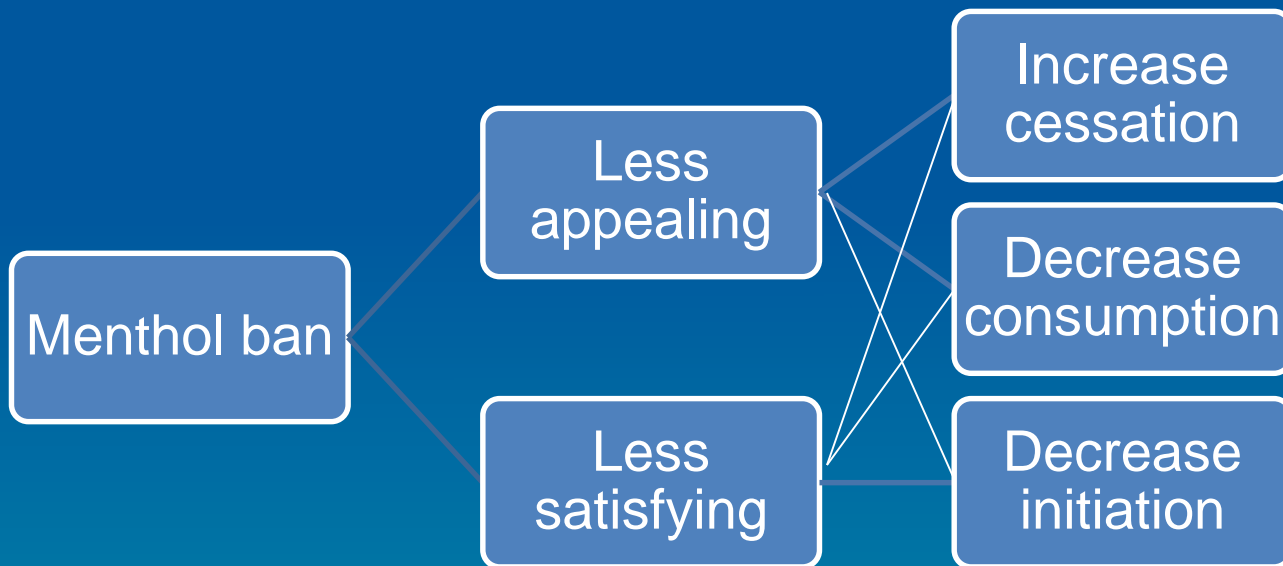
Why Ban Flavours (including Menthol)?

- Attract kids
- Make tobacco use more pleasant, less harsh
- Better aroma, aftertaste
- Perceived as healthier
- Make it harder to cut down
- Make it harder to quit

Ontario Bans

- 2016:
 - banned flavours in cigars, smokeless, shisha except for:
 - ◆ alcohol-based and menthol flavoured cigars
 - ◆ cigars less than 6 grams
- 2017: Menthol ban in Ontario

Theory of Change



Studying Industry Tactics Pre-ban



X 8



X 30

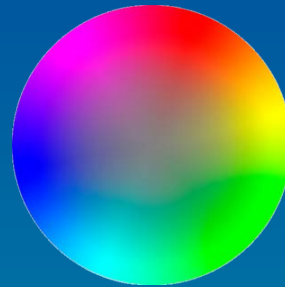


Pre-ban Findings

14/30



green,
blue, silver



Referrals to alternatives,
Choice, smooth, fresh, refreshing, and crisp

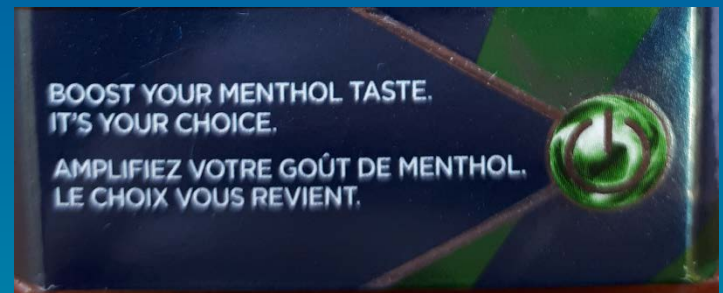
Industry Response

- Packs identified that explicitly suggested replacements prior to ban



Industry Preparation

- Introduced, after the announcement of the ban, capsule cigarettes
- Crushable capsule in the filter that gave a menthol taste
- Smooth OR Fresh
- Blue or green (some both)
- Focus on choice



Why Capsules?

- Segment that had not existed prior to the announcement of the ban
- Heavily marketed (to the extent allowable)
- Approximately 20% of smokers were regularly using capsules by the ban



AVERTISSEMENT

© Dr Martin T. Tyler

CANCER DE LA BOUCHE

Ces taches blanches représentent un cancer de la bouche, surtout causé par le tabagisme. Même si vous échappiez à la mort, vous pourriez perdre une partie ou la totalité de votre langue.

Libérez-vous enfin du tabac.



1 866 JARRETE (1 866 527-7383)
vivezsansfume.gc.ca/abandon

Santé Canada



TWIST THE FILTER
TO CHOOSE YOUR
TASTE INTENSITY.
IT'S YOUR CHOICE

Studying Industry Tactics Post-ban



X 5

Replacement



X 23



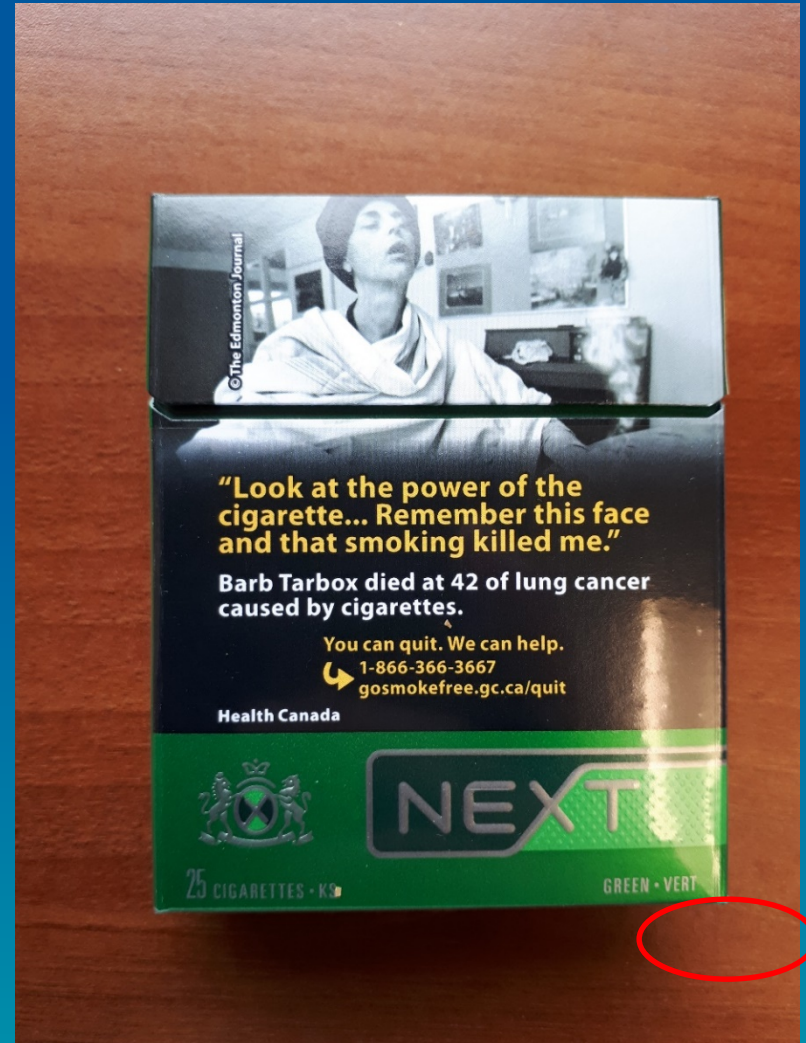
TIS...



Post-ban Findings

- 1) Materials demonstrating which post-ban packs replaced which pre-ban menthol packs;
- 2) Aqua filter, adjustable, and charcoal filter cigarettes;
- 3) replacements similar to menthol packs:
 - colour (green, blue, silver and white)
 - capsule pack symbols (power buttons)
 - descriptors (smooth, fresh).

“Green” Menthol replacement packs



Menthol Replacement

- Each major company produced materials that provided a replacement guide to menthol
- Not straightforward: very different types of replacement brands including





JOHN PLAYER CHOICE

WITH THE NEW
ADJUSTABLE FILTER
HAS REPLACED
JOHN PLAYER
CHARGE.



FREEDOM OF CHOICE

Anecdotal evidence of some shenanigans...

- Vendors pressured and offered incentives to push menthol replacement packs
- Some posters, stickers indicating replacement packs
- Visible notices of menthol being banned and guiding customers to ask vendor for replacements

Q&A



Health
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Canada

*Your health and
safety... our priority.*

*Votre santé et votre
sécurité... notre priorité.*

Flavoured Tobacco Products in Canada: Key Trends for Menthol Cigarettes, Cigars and Smokeless Tobacco

Business Intelligence Division
Office of Research and Surveillance
Tobacco Control Directorate
September 2017



Canada 

Purpose of the Presentation

- Provide an assessment of national sales trends for the key flavoured tobacco product categories in Canada (menthol cigarettes, cigars, smokeless tobacco).
- Data presented is derived from tobacco industry sales reports submitted to Health Canada under the *Tobacco Reporting Regulations (Section 13)*
- Data represent shipments directly to wholesalers and retailers.
- All data is subject to revision in the future based on re-submissions by companies and/or audits conducted by Health Canada.

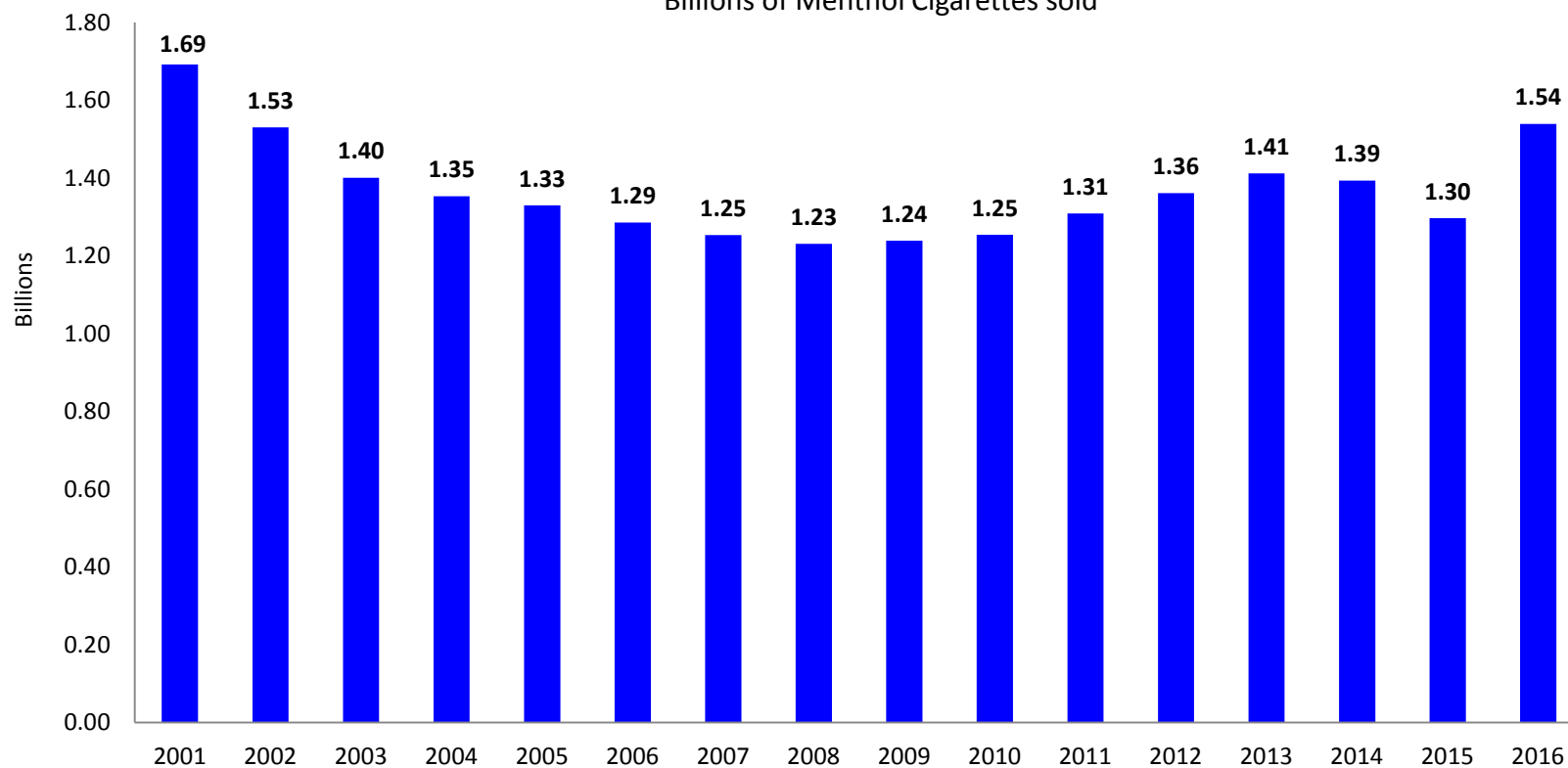


Sales of Menthol Cigarettes in Canada, 2001-2016

Menthol Cigarette Sales in Canada, 2001-2016

Source: Health Canada, TRR Section 13

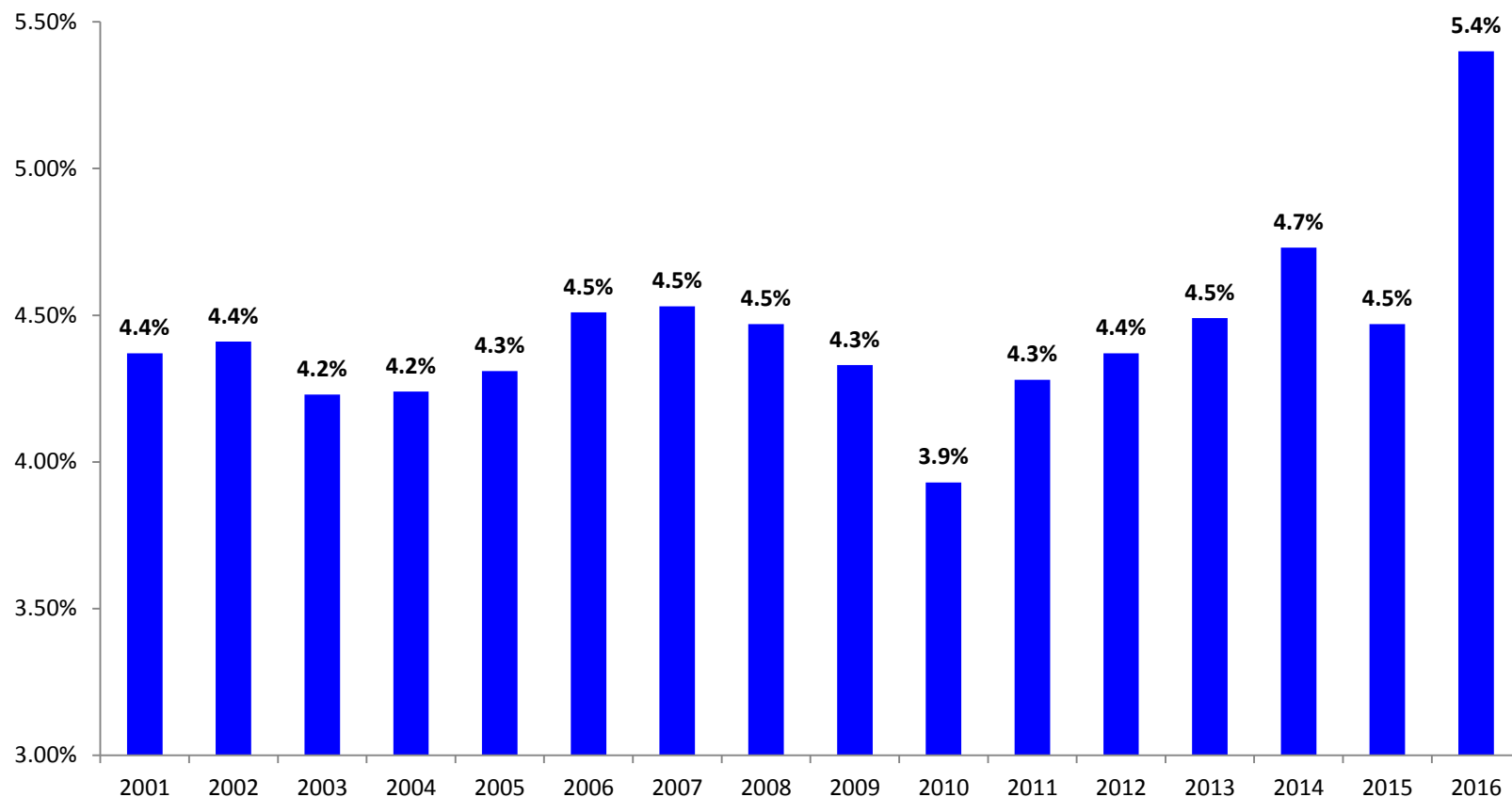
Billions of Menthol Cigarettes sold



Sales of Menthol Cigarettes in Canada, 2001-2016

Menthol as a % of all Cigarettes, 2001-2016

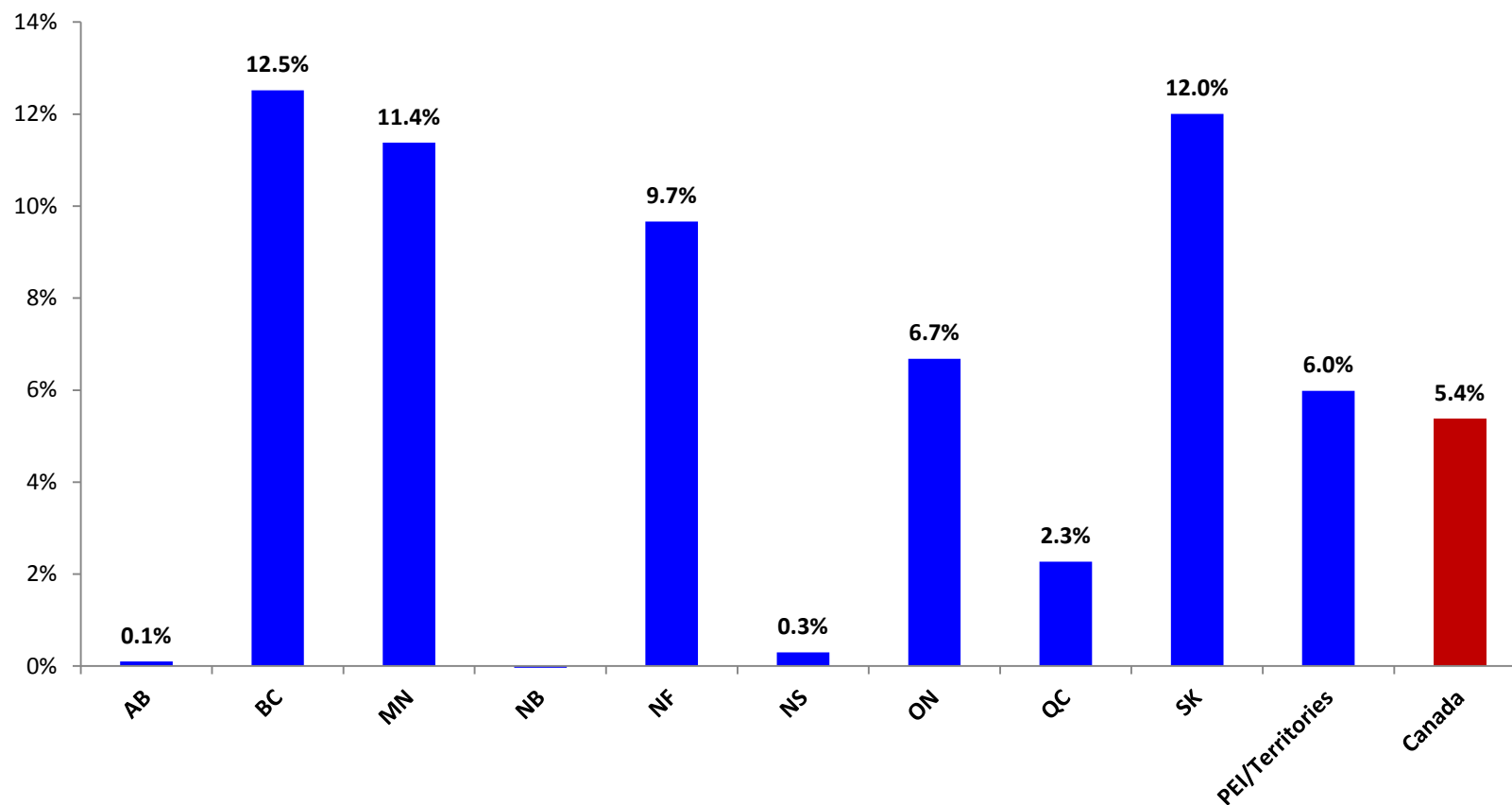
Source: Health Canada, TRR Section 13



Menthol Market Share by Province, 2016

Menthol Market Share by Province, 2016

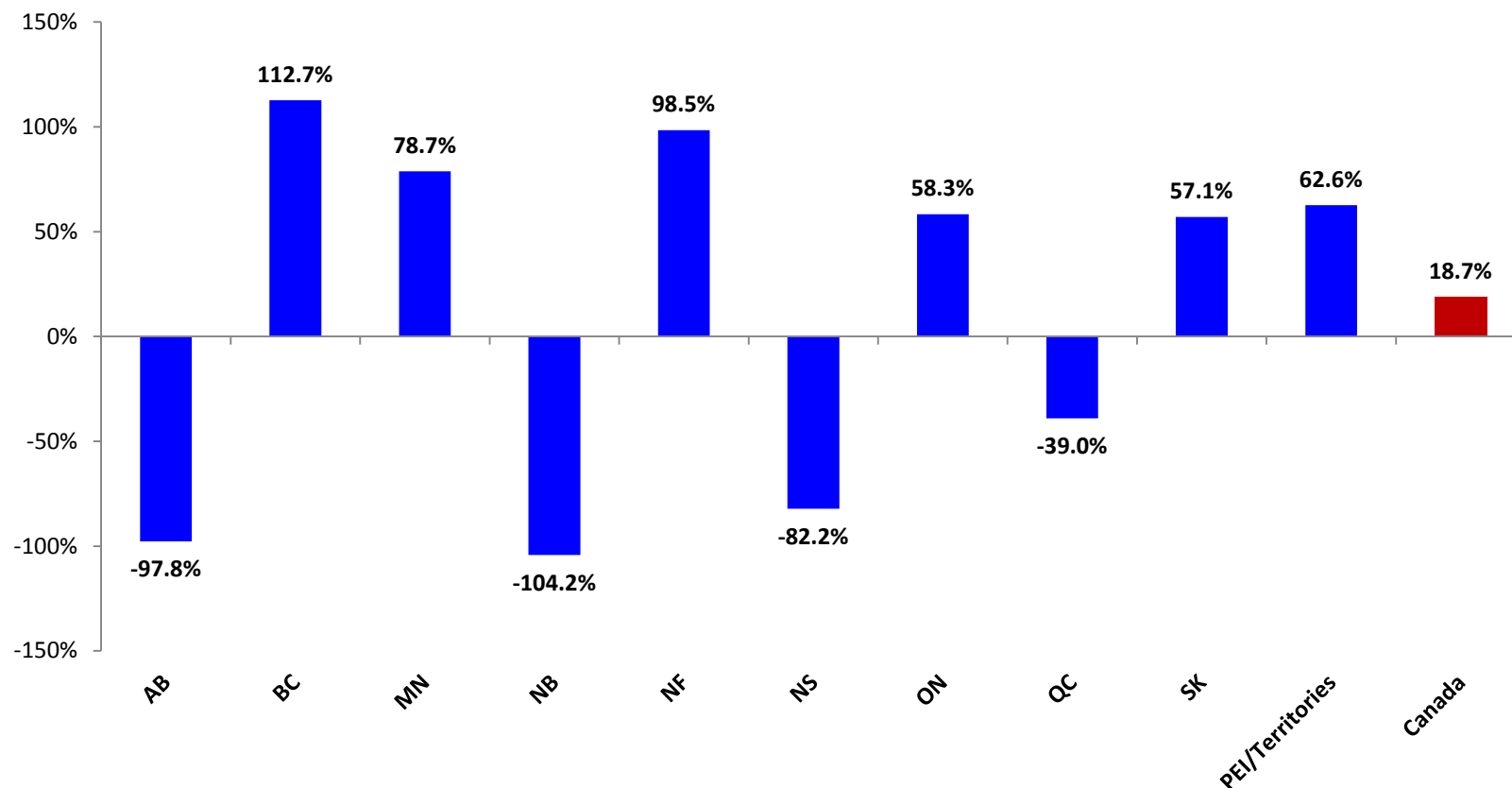
Source: Health Canada, TRR Section 13



Menthol Cigarette Unit Sales, Year-Over-Year Change, 2015-2016

Menthol Cigarettes by Province, Year-over-Year Change, 2015-2016

Source: Health Canada, TRR Section 13

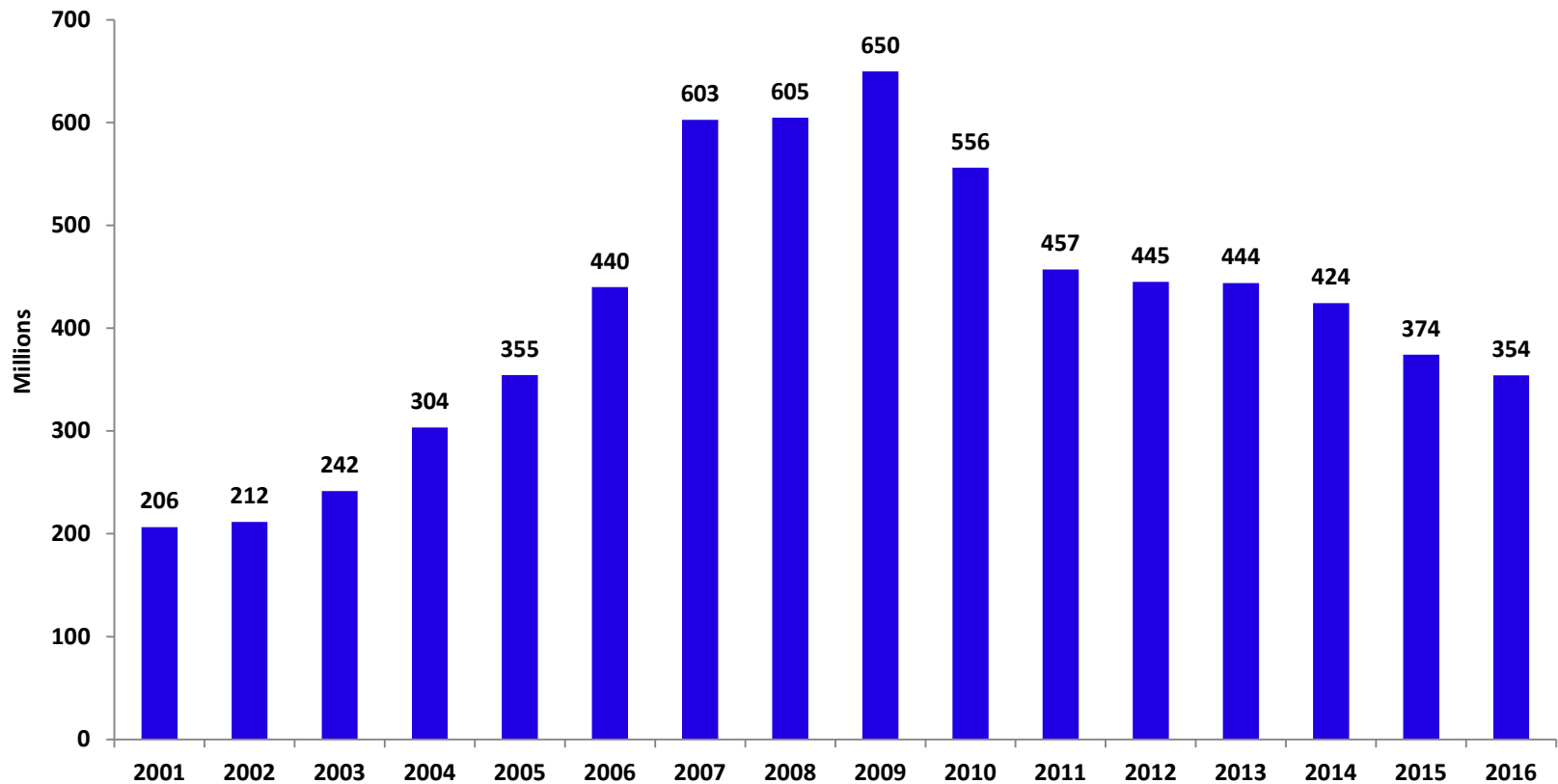


Cigar Sales in Canada, 2001-2016

Cigar Sales in Canada, 2001-2016

Source: Health Canada, TRR Section 13

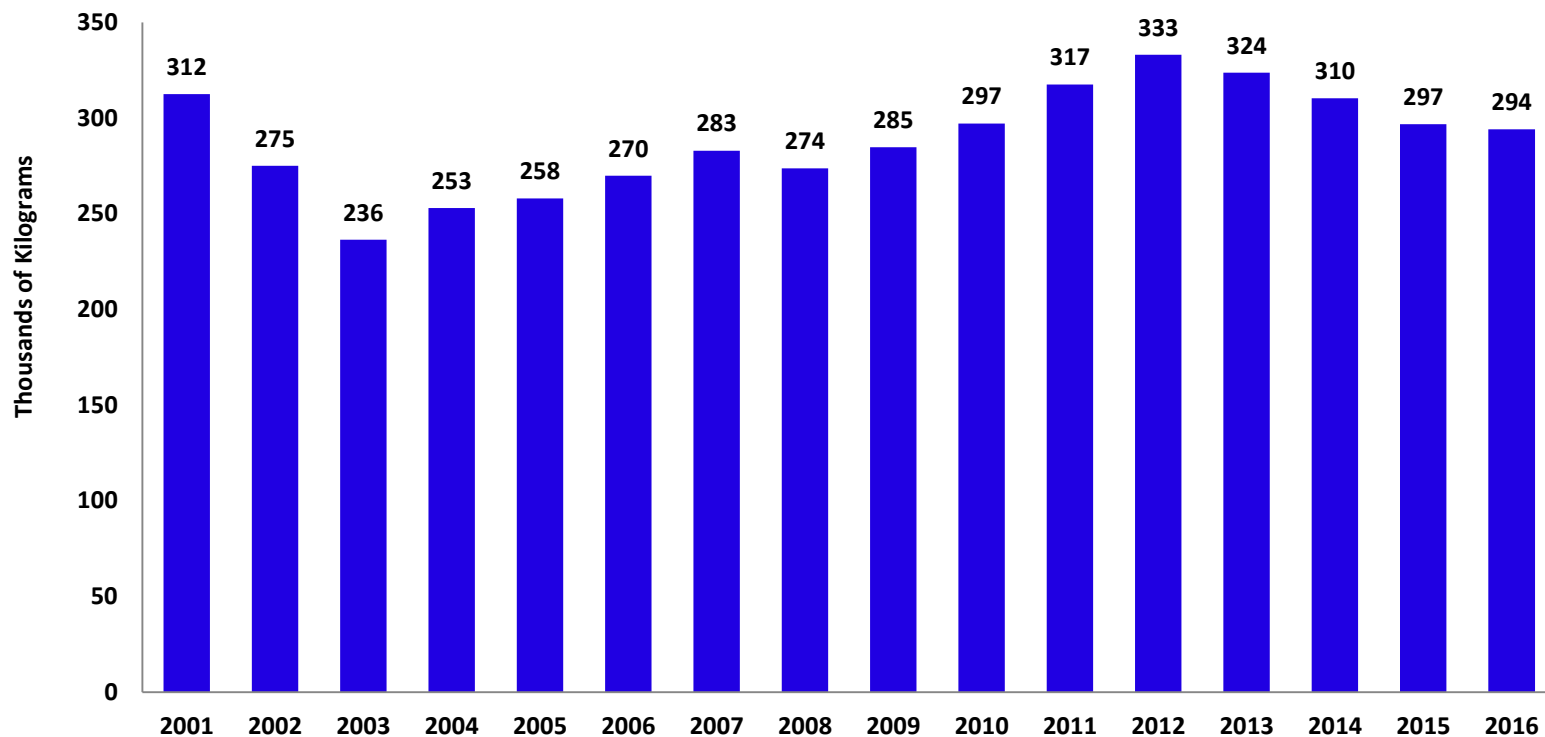
Millions of Cigars



Smokeless Tobacco Sales in Canada, 2001-2016

Sales of Smokeless Tobacco in Canada, 2001-2016

Source: Health Canada, TRR Section 13
Kilograms of Smokeless Tobacco



National Trends

- Menthol cigarette sales increased by 18.7% in 2016 and reached their highest level since 2002, even though four provinces had implemented menthol bans.
- Cigar sales declined (-5.4%) in 2016. This was the seventh consecutive year of declining sales; cigar sales in 2016 were 45% below their 2009 peak.
- Smokeless tobacco sales declined (-1%) in 2016, the fourth consecutive drop following a ten-year period of increasing sales.



For more information contact

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Q&A

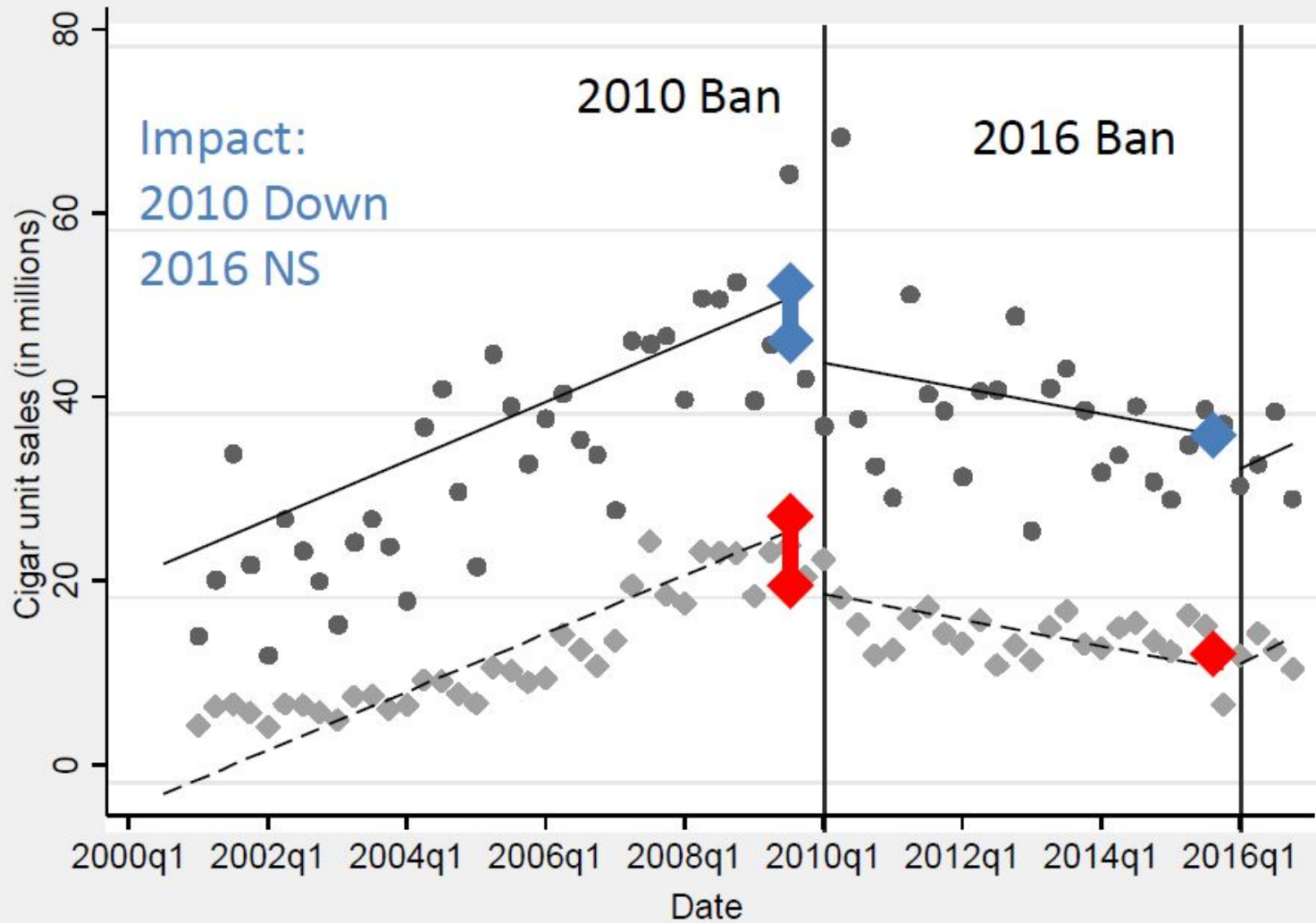
Impact of cigar and smokeless flavour regulations in Ontario and BC

Michael Chaiton

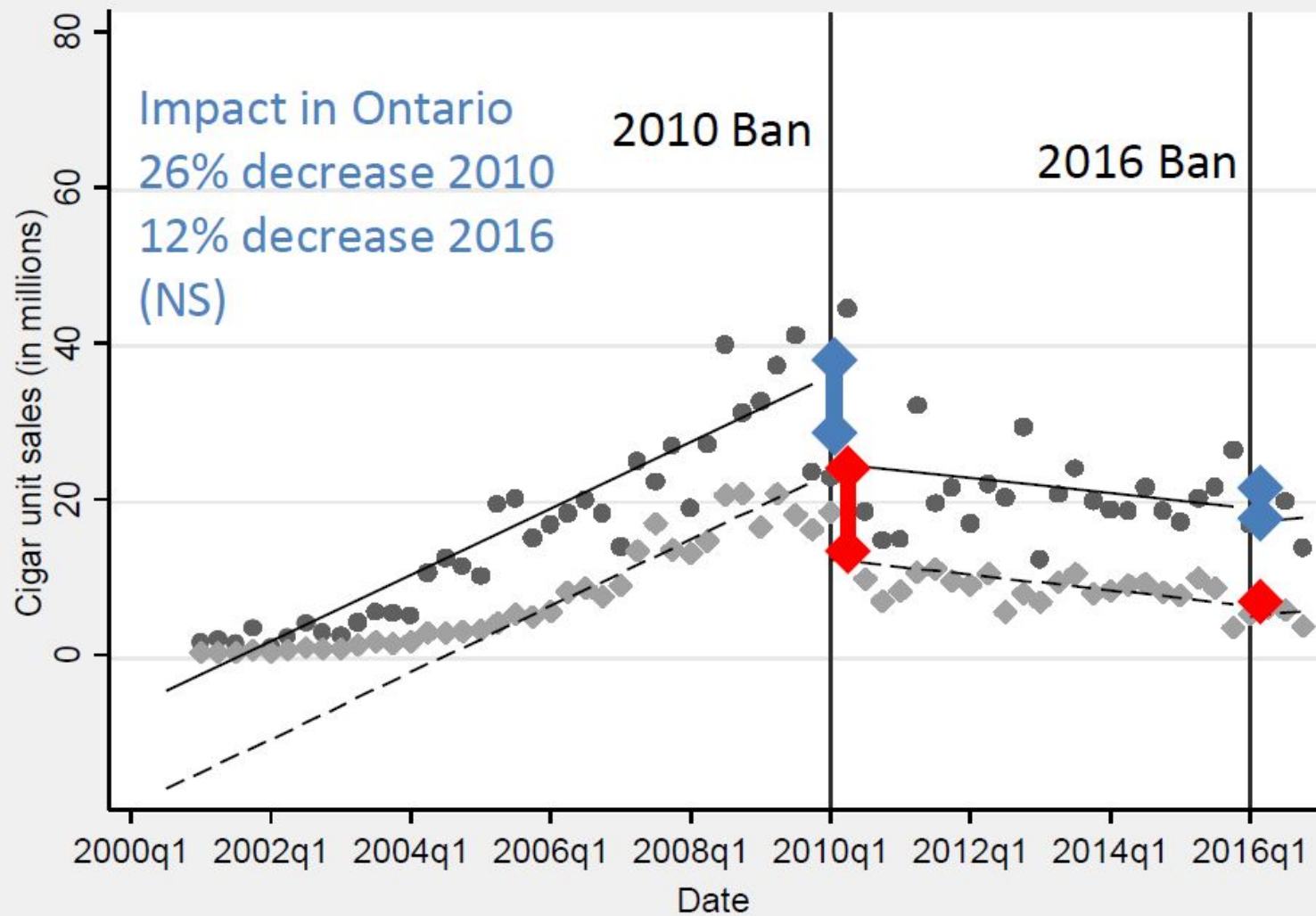
Methods

- Reported net sales data by quarter from 2001-2016
- Flavour descriptors: alcohol, fruit, menthol, cocktail, coffee or none
- Segmented regression to identify changes in intercept and slope of trends associated with regulations
- Is there a “break” in the trend associated with the timing of the intervention?

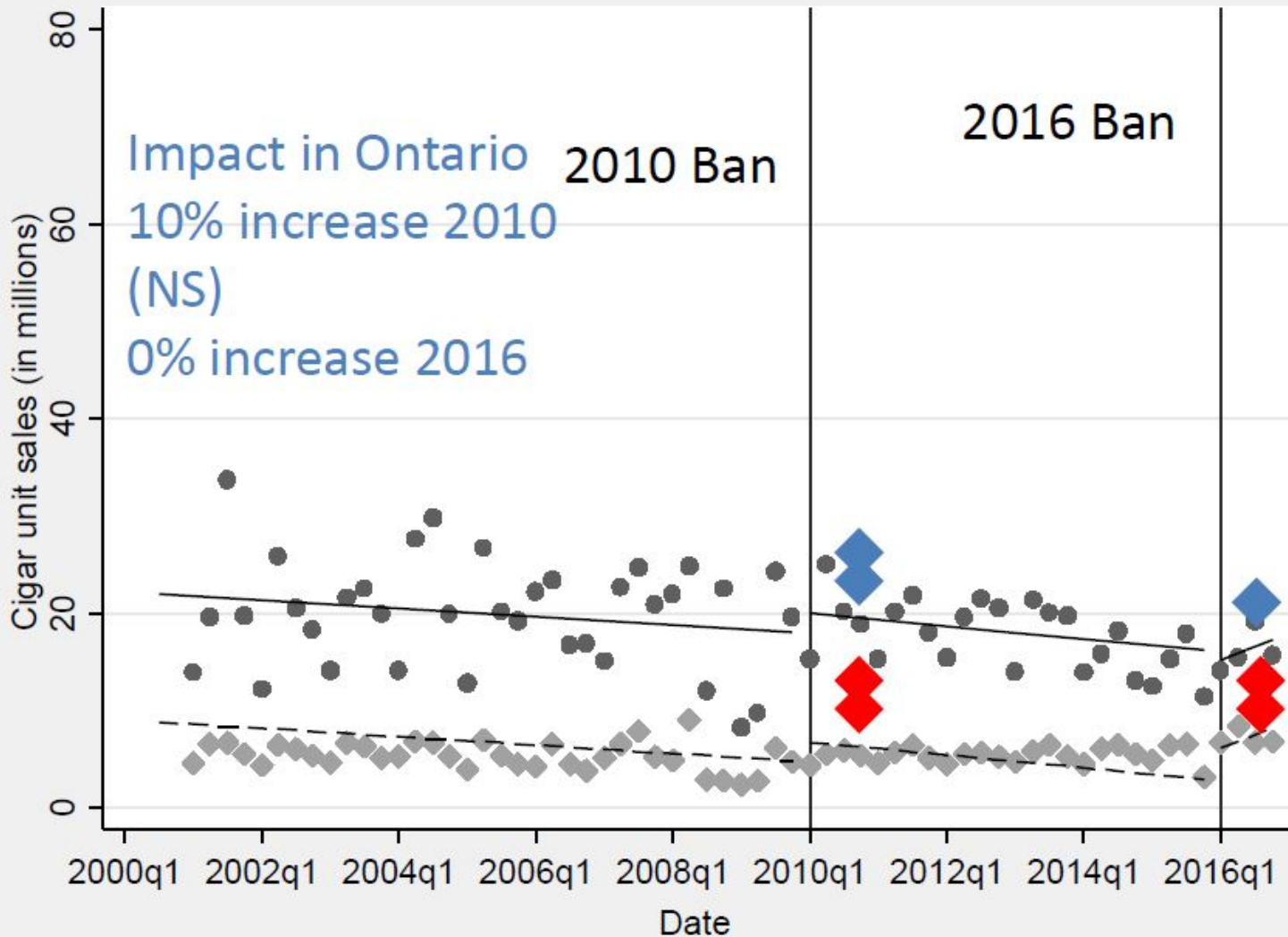
Total Cigar Sales



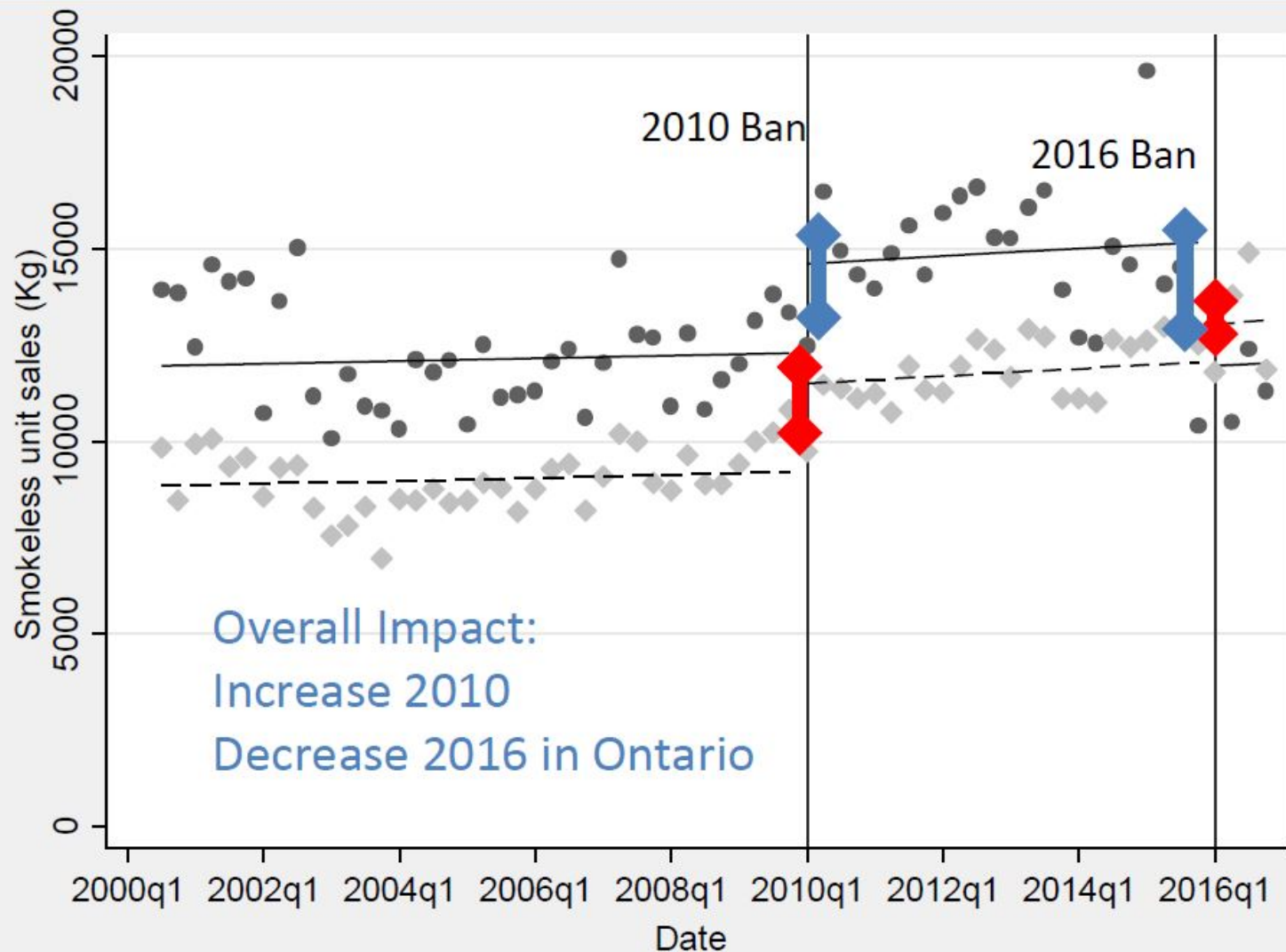
Flavoured unit sales



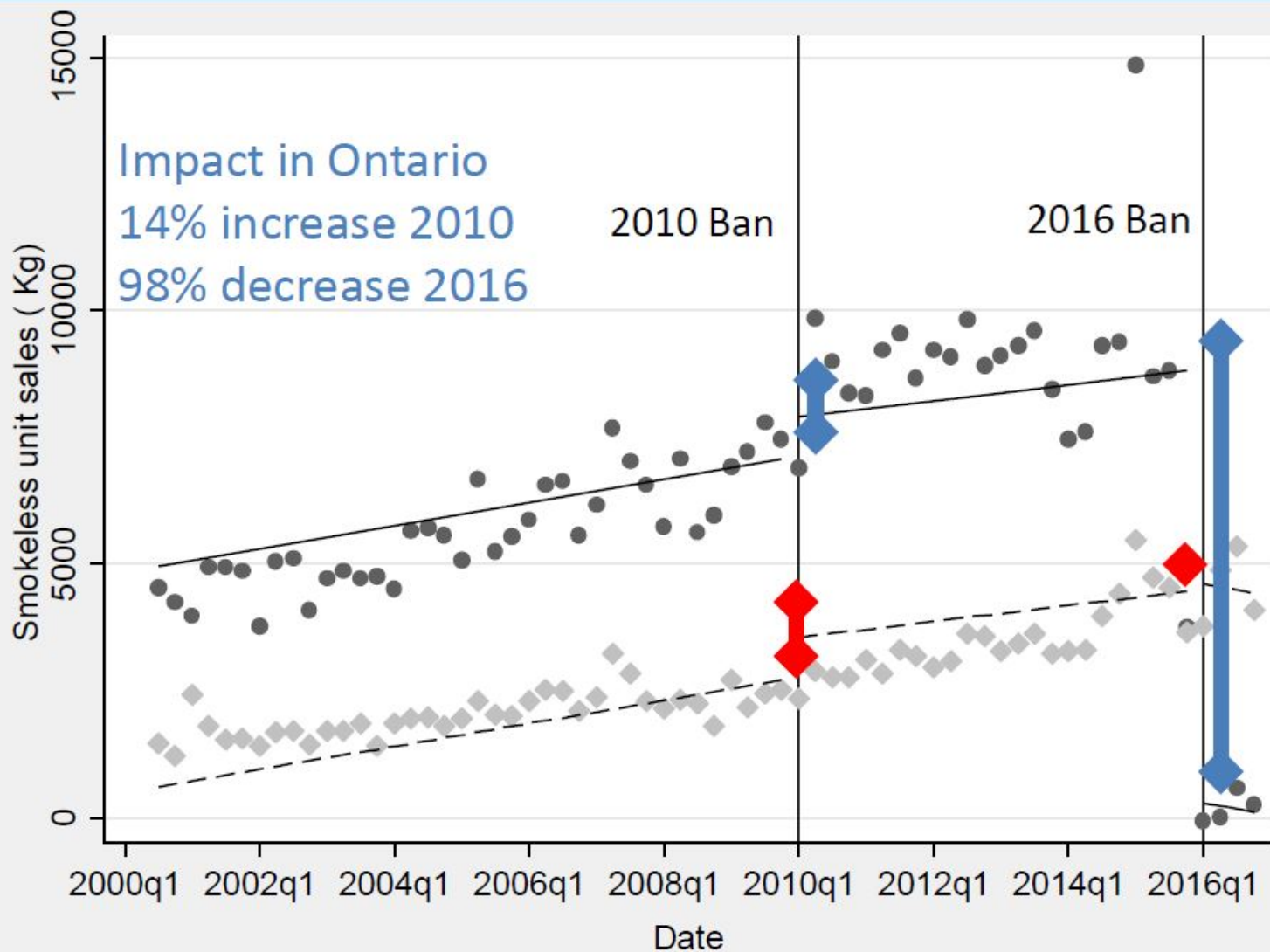
Unflavoured unit sales



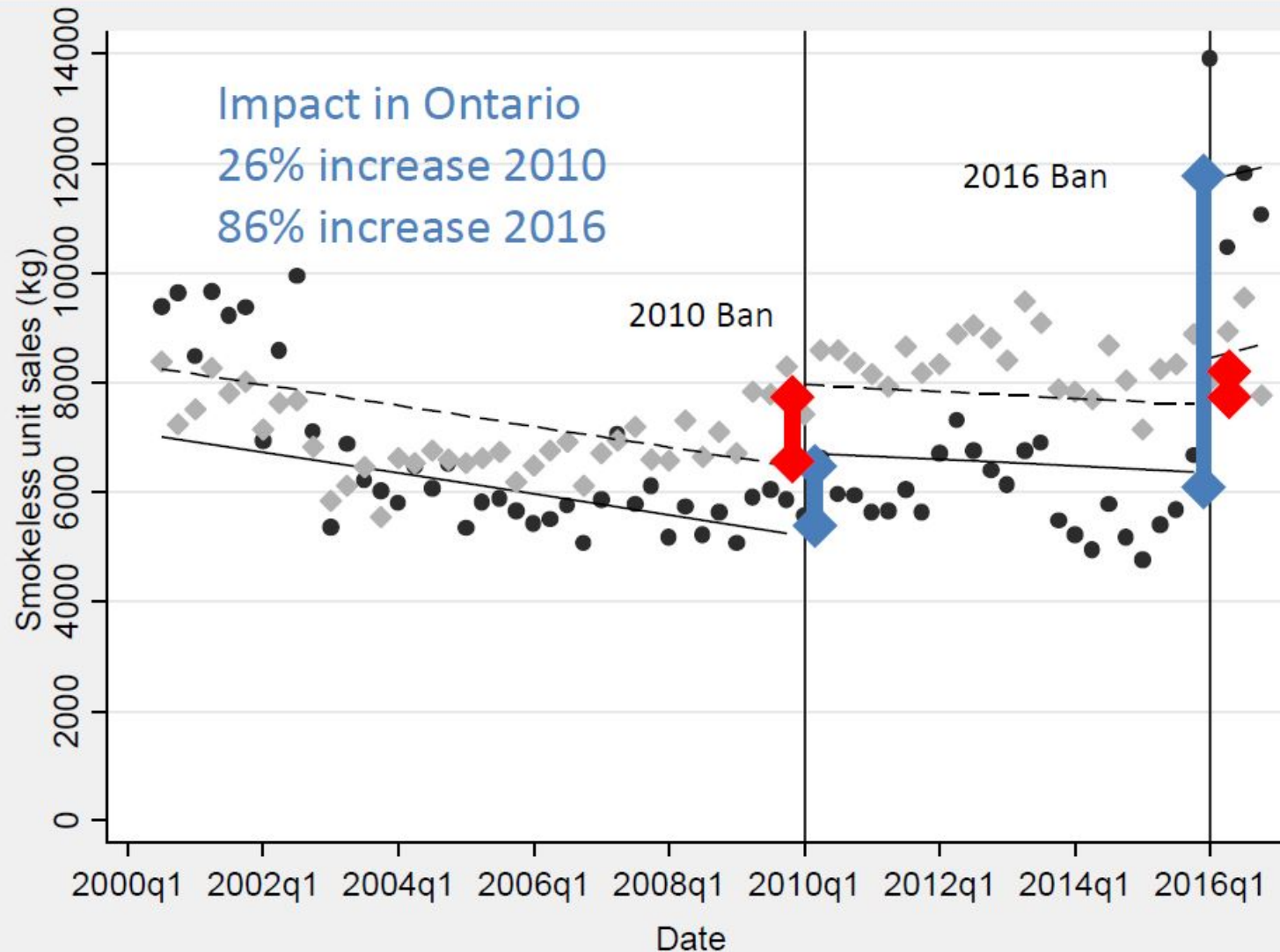
Total Smokeless sales



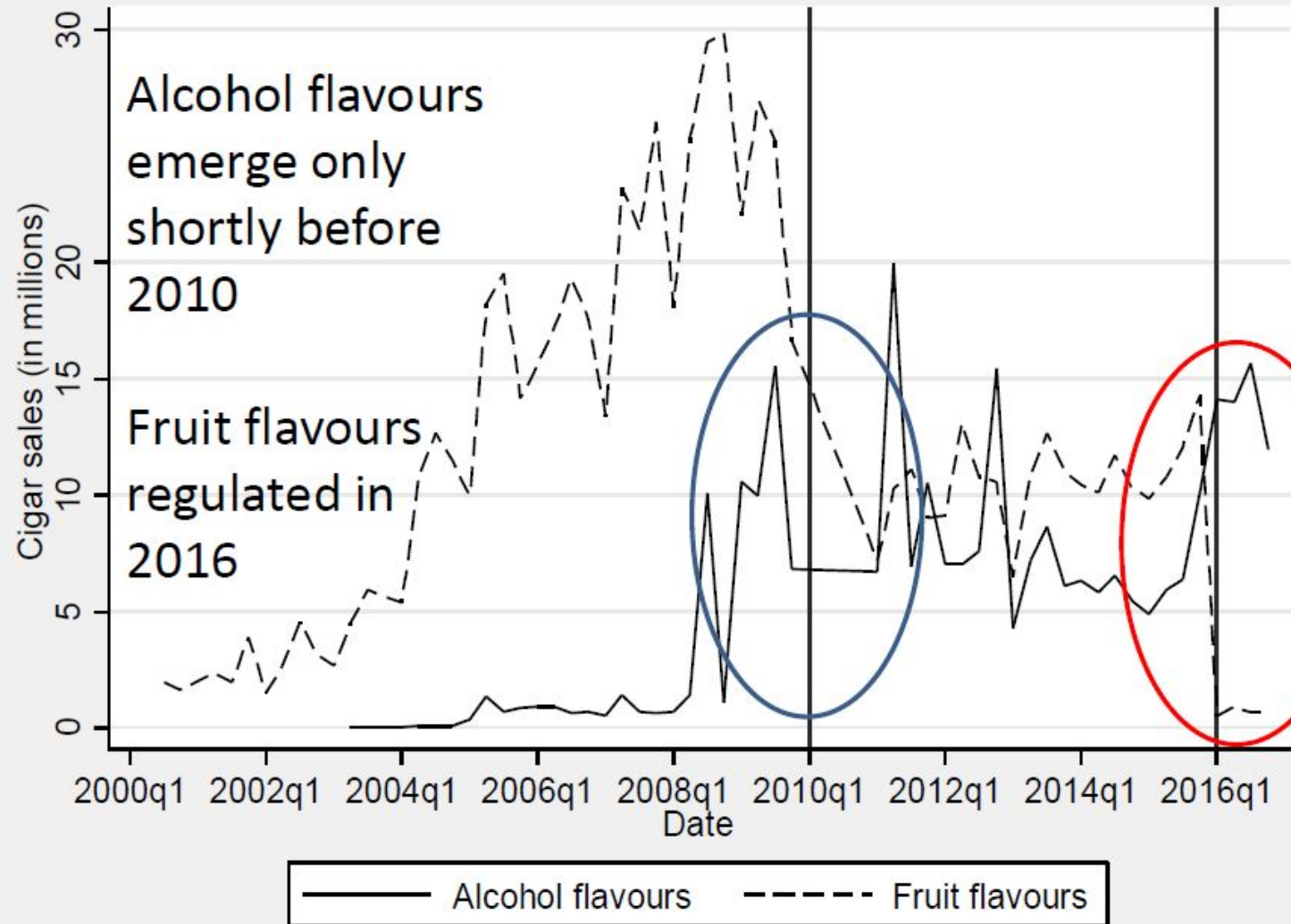
Flavoured Smokeless



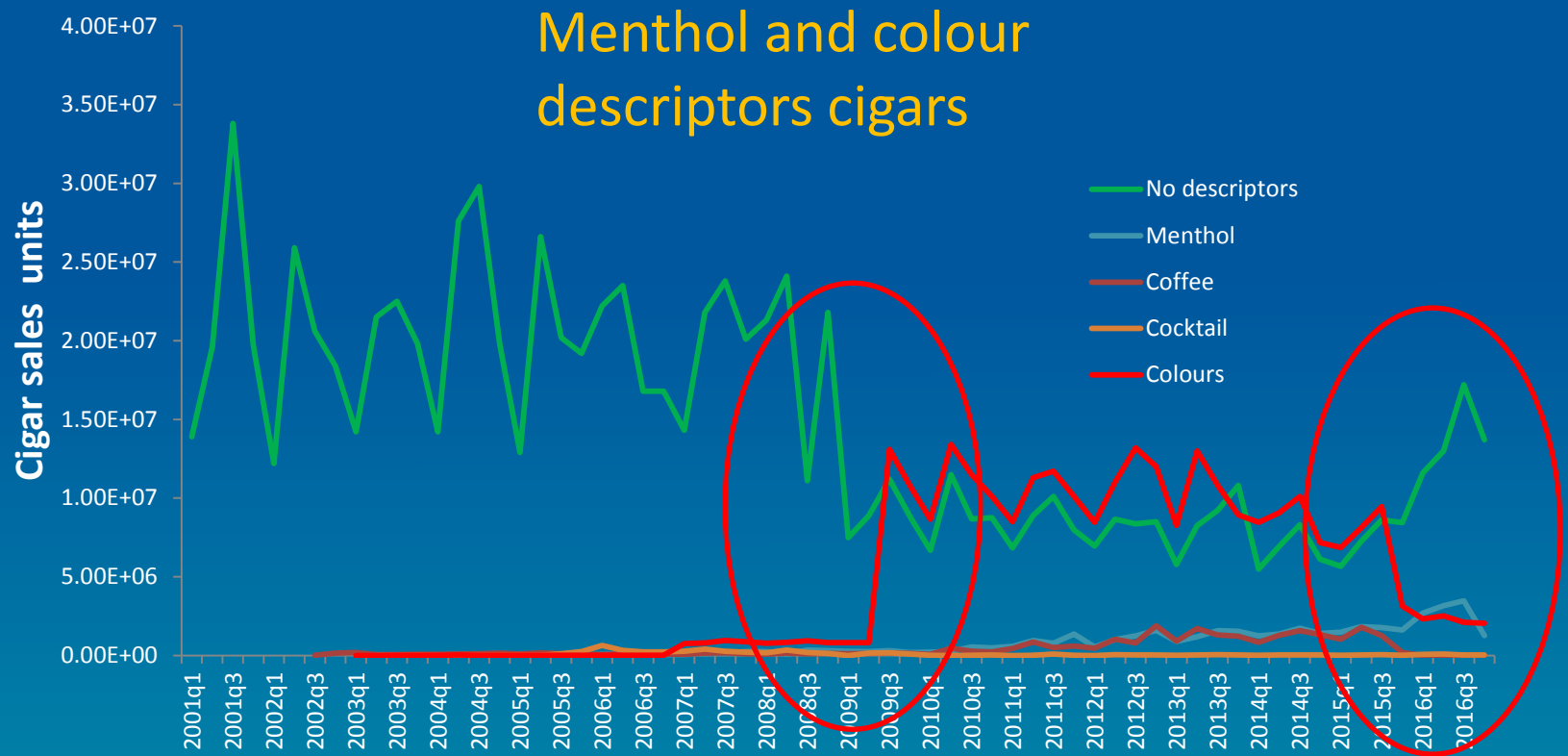
Unflavoured Smokeless



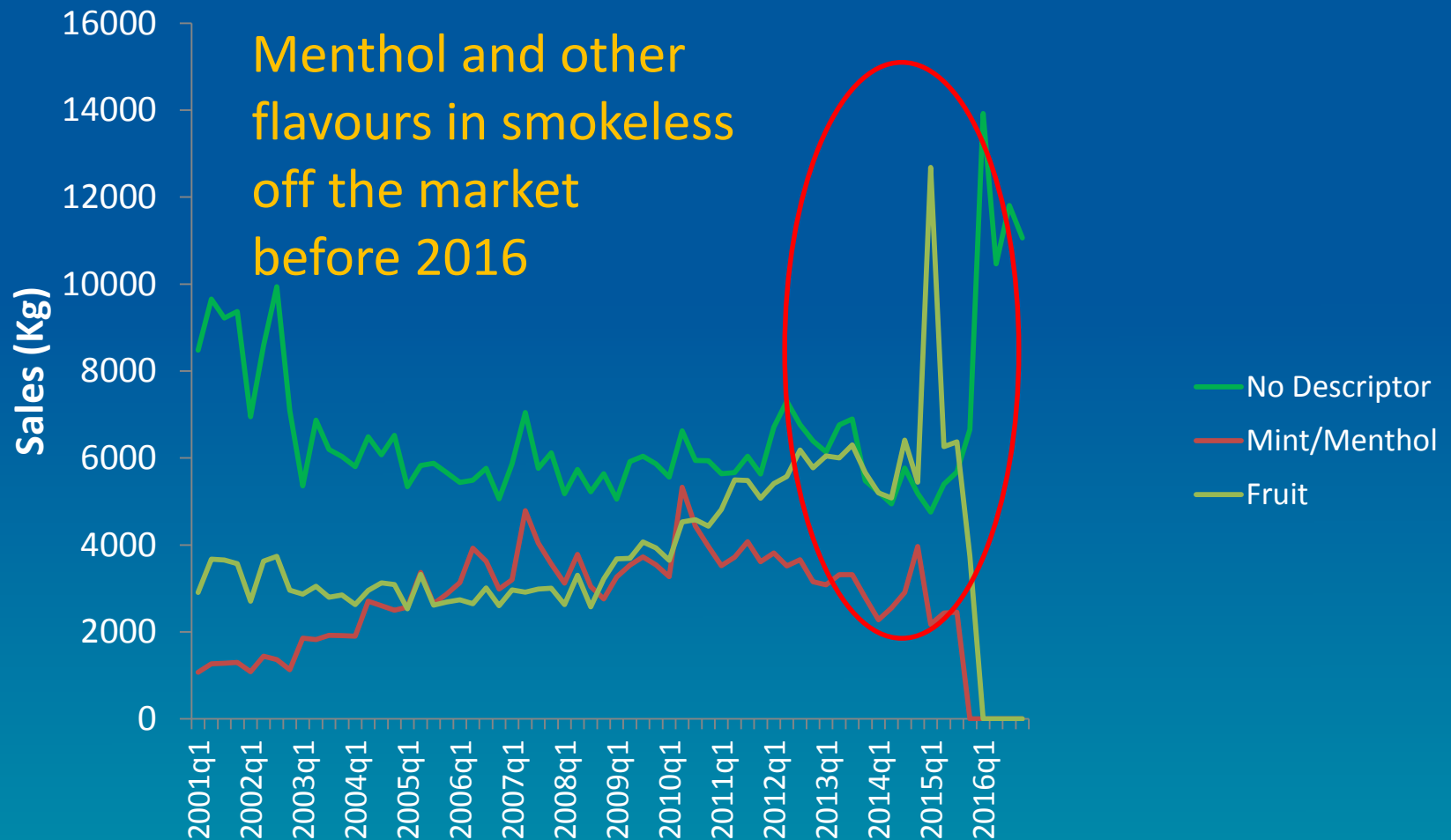
Sales of alcohol and fruit flavours Cigars in Ontario



ON Cigar Sales—Other flavours

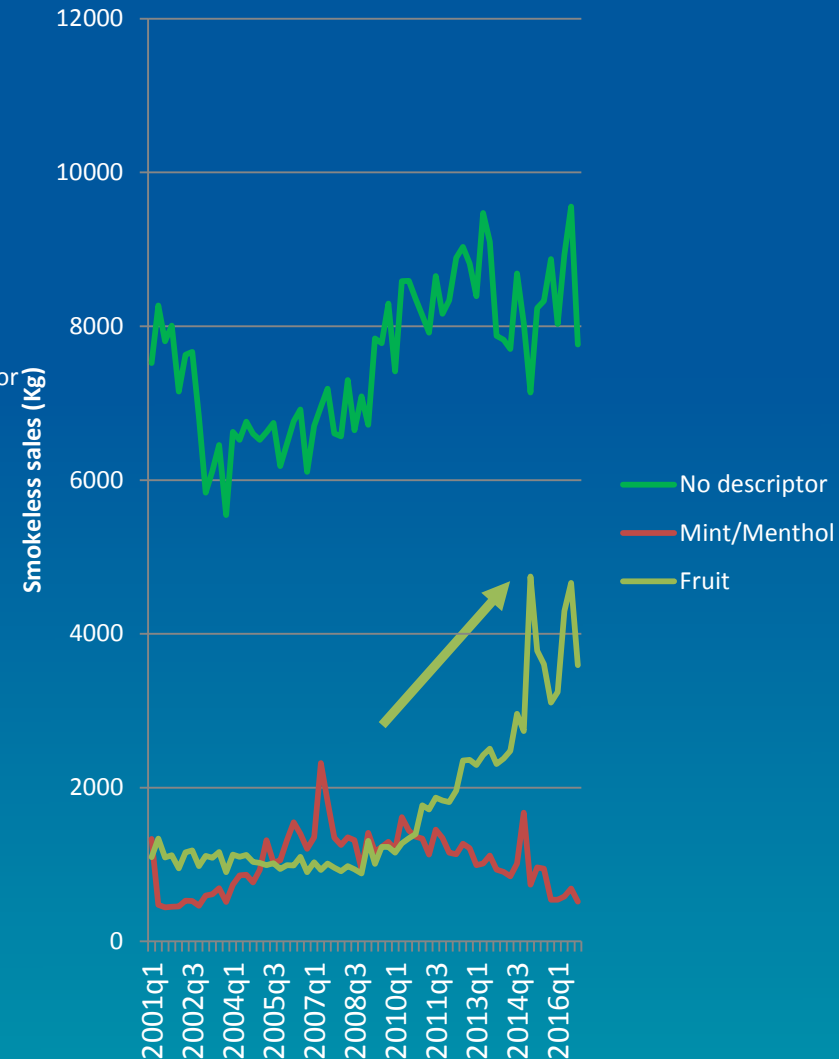
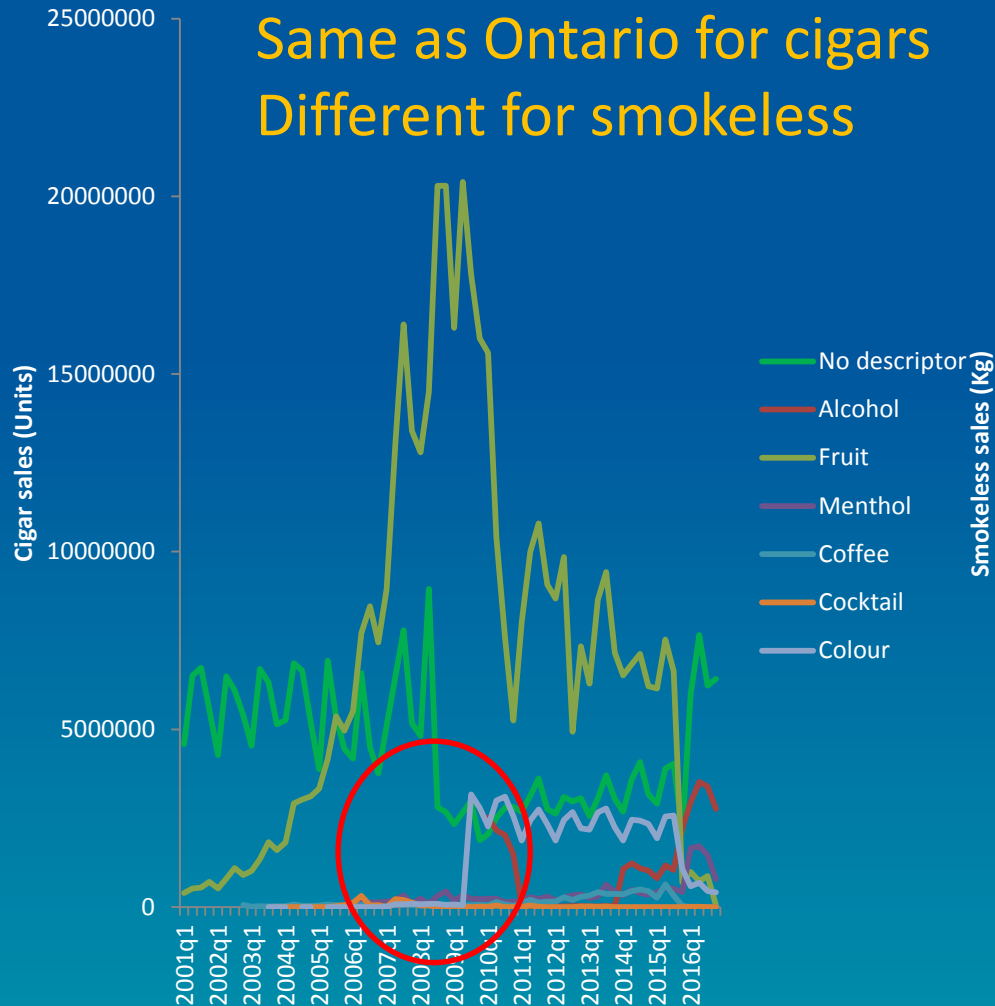


ON Smokeless Flavour



BC Other flavours

Same as Ontario for cigars
Different for smokeless



Conclusions

- Flavour regulations have had a significant impact on sales of cigars (2010) and smokeless products (2016 in Ontario)
- There is some indications of adaptations:
 - Menthol cigars appeared
 - Emergence of alcohol flavours



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DE L'ONTARIO

Generating knowledge for public health



Effects of a real world menthol ban: Changes in smoking behaviour and cigarette branding after a ban in Ontario, Canada

Acknowledgements

- Investigators: Tom Eissenberg, Joanna Cohen, Eric Soule, Rob Schwartz
- Staff: Bo Zhang, Tracey Borland, Shanice Christie, Jolene Dubray, Lori Diemert, Sonja Johnston
- This research was supported by the National Institute on Drug Abuse of the National Institutes of Health under Award Number P50DA036105 and the Center for Tobacco Products of the U.S. Food and Drug Administration. The content is solely the responsibility of the authors and does not necessarily represent the views of the NIH or the FDA

Methods

- Smokers (n=1041) were sampled through random digit dialing performed September to December 2016.
- Eligible participants included all Ontario residents (16+) who had smoked in the past 30 days. The response rate was 44%.
- An additional 700 menthol smokers were recruited through Smokers' Panel for a total of 1007 menthol smokers, followed longitudinally. First follow up was February 1st, 2017.
- Before and after pack purchase study

Menthol Smokers in Ontario

- Of Ontario smokers in our sample, 27% had smoked a menthol cigarette in the past year. 48% of past year menthol smokers used menthol regularly.
- Menthol users were younger (average age 48 vs 56; $P < 0.001$) and less likely to be White (77% vs 87%; $p = 0.002$). There were no differences by education, number of cigarettes smoked per day, or being a non daily smoker.
- Menthol users were more likely to have used other types of flavoured and unflavoured tobacco

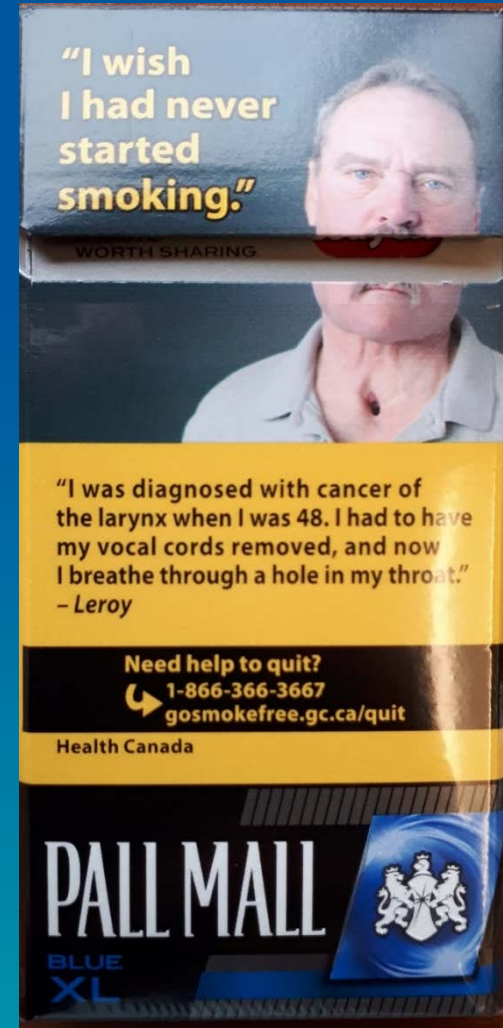
Awareness was low

Only 40 % of menthol users and 25% of non-menthol users had heard of the law

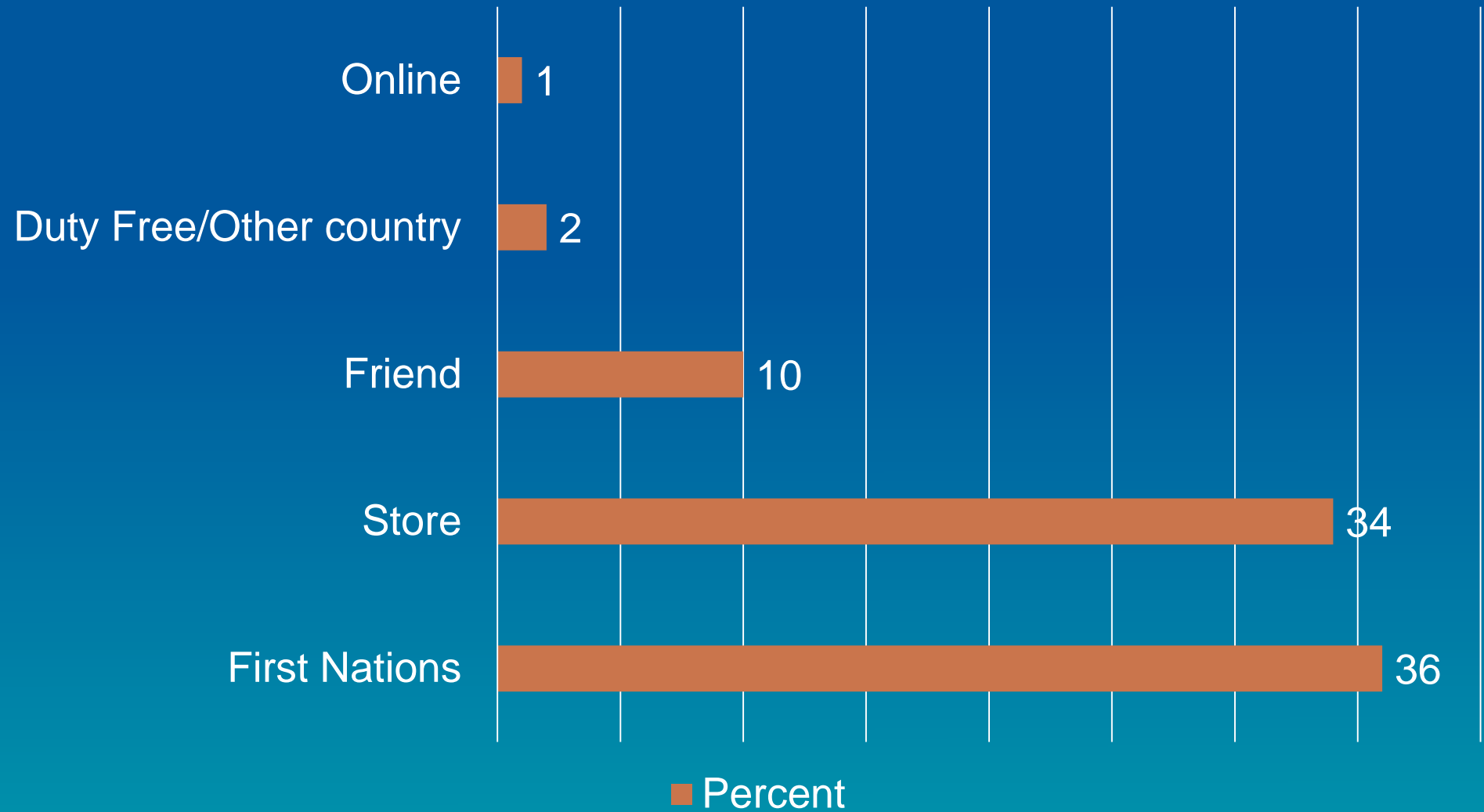


Smoker response at one month post ban

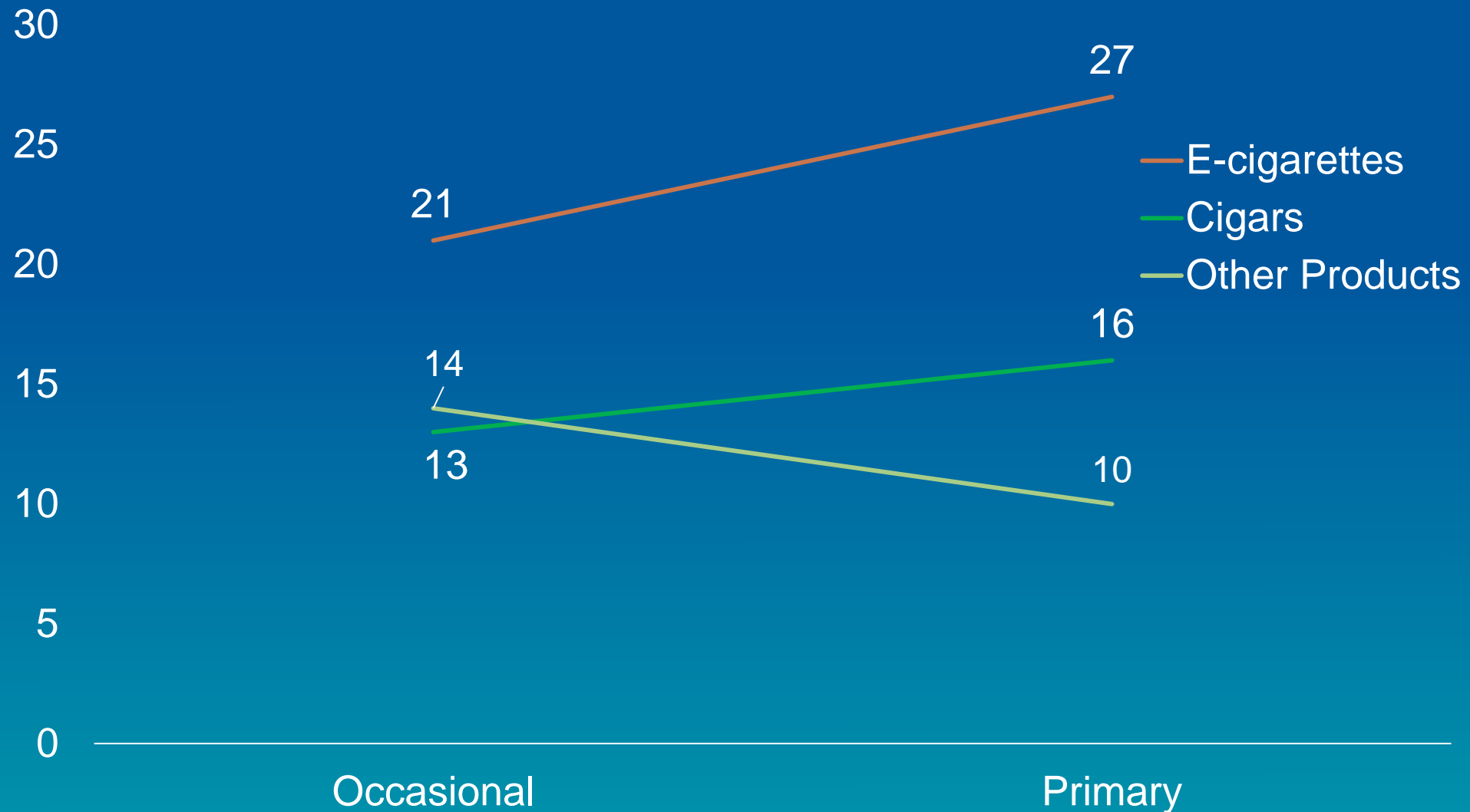
- 34% had smoked menthol post ban
 - 23% of occasional menthol smokers, 59% of regular
- 25% had tried to obtain
 - 13% of those were unsuccessful at obtaining



Method of obtaining



Use of alternative flavoured products after the ban



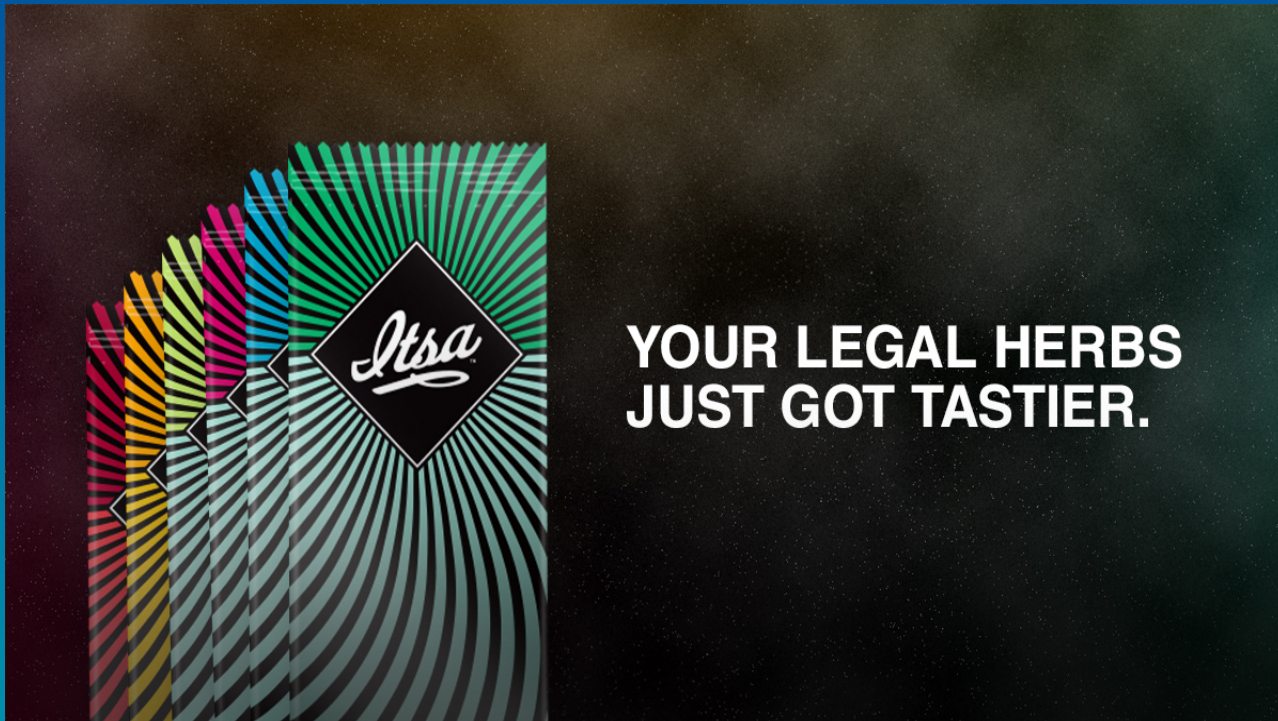
Quitting

- 15% abstinent at 1 month post ban
- 40% had made a quit attempt since the ban
- 64% of prior primary menthol smokers who made a quit attempt said it was related to the ban (vs. 22% of those who smoked menthol occasionally)

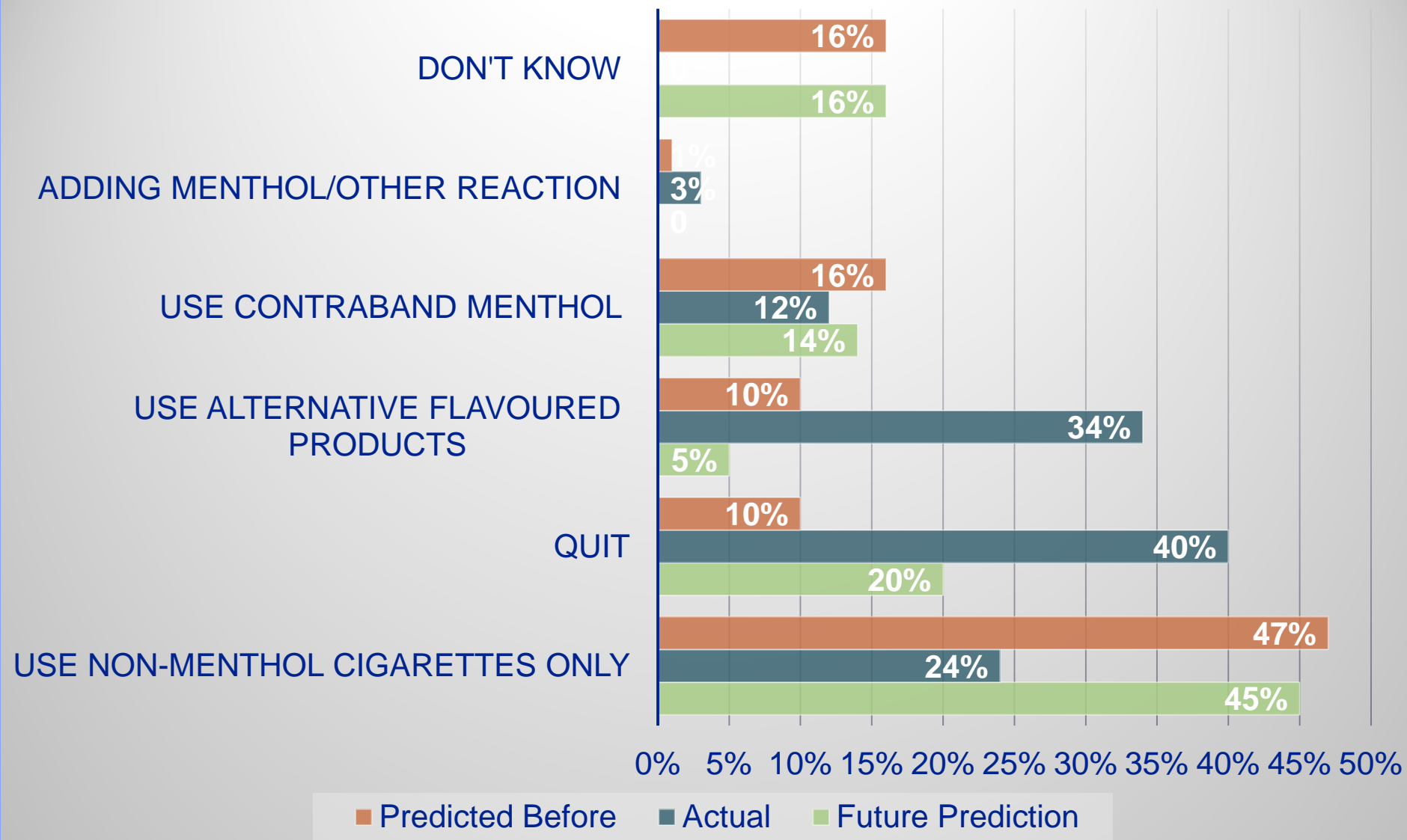


Other responses

- Adding mint/menthol flavour manually
- Switching to marijuana



Predicted vs Actual



Feasibility of Menthol Bans

- Overall, menthol ban implemented with minimal political controversy
- Industry response suggests heterogeneity of menthol users
- Early responses of smokers:
 - Try quitting
 - Alternatives not satisfying
- Long term responses will be tracked

Reference data

Predictors of outcomes

	Past Month Flavoured E-Cigarette Use			Past Month Flavoured Cigar Use			Past Month Other Flavoured Tobacco Use			Making a Quit Attempt Since Baseline			Past Month Menthol Smoking		
	Odds Ratio	CI	P value	Odds Ratio	CI	P value	Odds Ratio	CI	P value	Odds Ratio	CI	P value	Odds Ratio	CI	P value
Regular Menthol Smoking (vs. occasional)	2.02	(1.31, 3.11)	0.002	1.69	(1.02, 2.78)	0.040	0.78	(0.45, 1.34)	0.366	1.06	(0.74, 1.50)	0.764	6.37	(4.38, 9.27)	0.000
Support for menthol ban at baseline	0.68	(0.44, 1.05)	0.080	0.79	(0.48, 1.32)	0.372	1.27	(0.78, 2.05)	0.333	1.69	(1.21, 2.35)	0.002	0.76	(0.52, 1.09)	0.138
Past year e-cigarette use at baseline	1.00	(0.76, 1.31)	0.980	3.00	(2.21, 4.07)	0.000	1.28	(0.95, 1.71)	0.105	1.04	(0.83, 1.31)	0.720	1.04	(0.81, 1.34)	0.753
Past year cigar use at baseline	4.04	(1.97, 8.26)	0.000	0.89	(0.56, 1.43)	0.641	0.87	(0.55, 1.39)	0.564	0.88	(0.59, 1.32)	0.542	1.29	(0.82, 2.01)	0.270
Past year other tobacco use at baseline	0.87	(0.22, 3.44)	0.846	2.13	(0.82, 5.53)	0.122	3.39	(1.30, 8.84)	0.013	1.10	(0.50, 2.44)	0.811	0.75	(0.31, 1.81)	0.526

		Smokeless (all)		Flavoured		No Flavour Descriptor	
		Beta	p value	Beta	p value	Beta	p value
Ontario intercept		3113	0.000	4351	0.000	-1238	0.000
Enforcement of 2016 Federal and Ontario Flavour Ban		9746	0.181	-71	0.908	1046	0.074
Marginal Ontario effect of 2016 Flavour Ban		-4200	0.000	-8683	0.000	4483	0.000
Overall Trend		10	0.481	57	0.000	-48	0.000
Enforcement of 2010 Federal Flavour Ban		2302	0.000	741	0.053	1561	0.000
Marginal trend after 2010 ban		14	0.618	-15	0.527	30	0.197
Seasonal	Q2	749	0.014	222	0.386	527	0.030
	Q3	849	0.006	213	0.406	636	0.009
	Q4	-35	0.908	-329	0.203	294	0.228
Constant		8477	0.000	693	0.019	7784	0.000

		Cigar (all)		Flavoured		No Flavour Descriptor	
		Beta	p value	Beta	p value	Beta	p value
Ontario intercept		23700000	0.000	10000000	0.000	13700000	0.000
Enforcement of 2016 Federal and Ontario Flavour Ban		2010049	0.511	-2381477	0.365	4391526	0.018
Marginal Ontario effect of 2016 Flavour Ban		-2731505	0.460	1924226	0.544	-4655730	0.038
Overall Trend		761117	0.000	826106	0.000	140827	0.029
Enforcement of 2010 Federal Flavour Ban		-7300034	0.000	-9022406	0.000	1722372	0.130
Marginal trend after 2010 ban		-1107913	0.000	-1032075	0.000	75838	0.295
Seasonal	Q2	6888135	0.000	3352752	0.002	4085716	0.000
	Q3	7855710	0.000	2721903	0.014	4312526	0.000
	Q4	3727742	0.016	800823	0.465	2303457	0.003
Constant		-5709978	0.000	-9648096	0.000	6994020	0.005

	Ontario				British Columbia			
	Cigars (millions of units)		Smokeless (Kg)		Cigars (millions of units)		Smokeless (Kg)	
	Flavo ured	No descript or	Flavo ured	No descript or	Flavo ured	No descript or	Flavo ured	No descript or
Pre-2010 ban predicted mean	33	18.2	6995	5308	20.7	4.8	2644	6546
Post-2010 ban predicted mean	24.5	20.1	7943	6722	12.1	6.9	3591	7958
Per cent 2010 change	-26%	10%	14%	26%	-42%	44%	36%	22%
Pre-2016 ban predicted mean	19.5	16.3	8784	6357	7.0	3.1	4433	7596
Post-2016 ban predicted mean	17.2	16.3	199.5	11813	5.2	7.2	4531	8568
Per cent 2016 change	-12%	0%	-98%	86%	-26%	132%	2%	13%

	No descriptor										
Date	s	Alcohol	Fruit	Menthol	Coffee	Cocktail	Colour	No Descriptor	Menthol	Fruit	
2008q1	2.13E+07		0	1.88E+07	246872	81045	164853	765308	5177.08	3118.92	2630.04
2008q2	2.41E+07		0	2.68E+07	81134	156139	351393	824002	5732.4	3780.92	3302
2008q3	1.11E+07		0	3.95E+07	335548	109064	193482	923875	5219.82	3044.52	2577
2008q4	2.18E+07		0	3.09E+07	311721	123205	129744	818705	5639.04	2759.44	3217
2009q1	7478696		0	3.25E+07	269956	101466	0	806816	5055.72	3264.94	3678
2009q2	8882925		0	3.69E+07	236719	128045	144629	820819	5918.9	3538.8	3695
2009q3	1.12E+07			4.07E+07	298011	169719	169250	1.31E+07	6040.9	3726.74	4070
2009q4	8841475			2.34E+07	183843	131645	93240	1.08E+07	5865.46	3544.88	3929
2010q1	6677254	6537819	1.62E+07	213571	77209	9442	8654349	5561.531		3271	3649.12
2010q2	1.15E+07	1.02E+07	3.39E+07	256401	469591	1159	1.34E+07	6625.988		5325	4526.88
2010q3	8681768	7994773	9914427	544695	272287	3916	1.15E+07	5943.11		4434	4579.68
2010q4	8757406	6906546	7298074	480020	219073	27462	1.01E+07	5936.04		3963	4429.2
2011q1	6831329	156288	1.39E+07	577060	449043	0	8492197	5640.443		3524	4814.96
2011q2	8883462	96889	3.04E+07	941035	849692	17447	1.13E+07	5665.622		3721	5496
2011q3	1.01E+07	98334	1.82E+07	778320	503793	80164	1.17E+07	6040.714		4075	5481
2011q4	7976453	59414	1.97E+07	1358450	588784	12806	1.01E+07	5631.018		3615	5072
2012q1	6946672	5625	1.62E+07	544380	463865	0	8454567	6706.278		3814	5410
2012q2	8647483	10410	2.01E+07	1013840	1023462	47880	1.10E+07	7303.15		3520	5576
2012q3	8362931	10260	1.83E+07	1233981	790314	40036	1.32E+07	6764.727		3657	6185
2012q4	8503763	8605	2.60E+07	1597728	1895549	31710	1.20E+07	6391.066		3154.5	5774
2013q1	5778684	11180	1.08E+07	895686	902241	20267	8271090	6137.52	3081.812	6046.248	
2013q2	8251052	29685	1.79E+07	1183211	1708418	38540	1.30E+07	6763.248	3314.586	6000.754	
2013q3	9219107	16855	2.13E+07	1580139	1297469	54965	1.08E+07	6898.525	3315.086	6298.426	
2013q4	1.08E+07	21560	1.71E+07	1534101	1222126	21455	8922446	5476.579	2790.928	5662.14	
2014q1	5489397	5623443	1.11E+07	1235569	836740	13470	8456918	5213.647	2280.327	5197.142	
2014q2	6931507	5048866	1.09E+07	1369701	1291009	26105	9065214	4941.729	2551.737	5078.932	
2014q3	8309731	5730394	1.25E+07	1738578	1574629	21732	1.01E+07	5767.468	2906.277	6412.307	
2014q4	6116311	4802024	1.10E+07	1396679	1325015	25375	7159934	5182.331	3961.414	5445.104	
2015q1	5665774	4215137	1.05E+07	1485361	1018771	17380	6851035	4756.549	2173.892	12683.61	
2015q2	7265046	5071428	1.16E+07	1835992	1798552	36215	8130648	5397.825	2431.978	6262.525	
2015q3	8613170	5710189	1.27E+07	1766665	1267911	52140	9457889	5680.046	2455.007	6373.266	
2015q4	8440489	7948169	1.66E+07	1615692	193330	4735	3141456	6653.989	0	3735.226	
2016q1	1.16E+07	1.09E+07	3697112	2693538	0	77370	2321951	13921.23	0	0	
2016q2	1.30E+07	1.17E+07	3230729	3158712	0	85905	2520420	10465.31	0	0	
2016q3	1.72E+07	1.40E+07	2304204	3473561	1620	21560	2102500	11809.44	0	0	
2016q4	1.37E+07	1.19E+07	688523	1257263	4030	27550	2035568	11058.48	0	0	

0=Suppressed value

ON

	No descriptor							No Descriptor Menthol Fruit		
Date	s	Alcohol	Fruit	Menthol	Coffee	Cocktail	Colour			
2008q1	4819867		1.28E+07	243030	41805	42650	81781	6566.02	1253	911.24
2008q2	8951470		1.45E+07	93273	44284	44816	90043	7301.2	1356	981
2008q3	2812583		2.03E+07	317928	45038	14025	90192	6648.7	1318	937
2008q4	2676271		2.03E+07	438080	43701	13737	65608	7089.1	937	883
2009q1	2330286		1.63E+07	177730	26447	0	74679	6717.6	1411	1309
2009q2	2666716		2.04E+07	332560	53393	0	51019	7841.2	1167	1011
2009q3	2990418		1.78E+07	233668	58190	0	3167875	7780	1228	1230
2009q4	1883945		1.60E+07	229920	61016	13946	2790430	8295.9	1296	1231
2010q1	2058536	2519764	1.56E+07	236249	45965	8441	2266160	7412.6	1191	1154
2010q2	2515165	2163825	1.04E+07	231382	142424	42868	2999268	8587.54	1618	1275
2010q3	2799952	2028763	7581847	134564	70879	0	3107321	8591.6	1440	1341
2010q4	2818972	1488961	5251533	158618	37207	4571	2555107	8356.7	1363	1398
2011q1	2679983	48239	8001781	175540	117853.9	0	1870967	8141.3	1339	1771
2011q2	3138237	36377	1.00E+07	276615	205732	48681	2445177	7917.7	1129	1718
2011q3	3622497	0	1.08E+07	222920	127985	10640	2745082	8651.3	1456	1869
2011q4	2754971	27012	9073083	299553	152861	2464	2330370	8162.391	1348	1832
2012q1	2630975	18800	8681099	182460	150092	5120	1875520	8335.223	1156	1810
2012q2	3103047	18997	9850521	264600	276470	2764	2452129	8888.063	1133	1961
2012q3	2971117	25390	4931702	334070	197302	4334	2678045	9032.867	1273	2355
2012q4	3065489	24015	7336469	348702	289145	15086	2212319	8816.003	1213	2363
2013q1	2557032	23105	6286487	255088	322925	15626	2183631	8391.885	992	2294
2013q2	3061639	21760	8642832	300412	427179	14020	2668779	9472.08	1014	2423
2013q3	3712852	28680	9425867	629878	372036	23460	2778064	9098.746	1117	2506
2013q4	3049021	19410	7156047	431416	368733	4945	2242125	7874.252	934	2309
2014q1	2681227	1072345	6516679	338439	357309	1580	1871467	7824.207	903	2378.617
2014q2	3593536	1232247	6834964	491157	452892	1295	2456326	7704.319	845.255	2479.264
2014q3	4079310	1091620	7119204	393574	497421	1250	2429261	8686.015	1013.71	2958.719
2014q4	3171258	1023990	6215484	351139	453617	1935	2345978	8040.027	1674	2736
2015q1	2910615	812596	6148921	417533	265629	2625	1936489	7139.019	737.12	4743.866
2015q2	3898382	1169441	7526988	554423	643189	4110	2550488	8238.433	963.5914	3781.405
2015q3	4038789	1043888	6634871	510514	326227	1235	2580647	8328.881	945.0764	3604.238
2015q4	2119979	2219790	695397	421636	38463	0	1076910	8873.512	544.251	3105.429
2016q1	5984002	2942156	988903	1660669	0	8755	584044	8027.043	541.3331	3242.208
2016q2	7652231	3522986	733224	1715415	0	12810	683152	8931.027	586.329	4294.52
2016q3	6236317	3397398	870211	1460267	0	4700	453122	9557.13	689.604	4661.21
2016q4	6419228	2767110	56427	781847	0	3350	414359	7760.128	518	3591.741

BC

Q&A



Thank you for participating

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A link to our **webinar survey** will be emailed to you following this webinar.

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