



# Nicotine Survey 2021: Key Insights and System Overview

June 2021

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## INTRODUCTION

Background on the Nicotine Survey system

## NICOTINE FORMAT USE PATTERNS

Measuring COVID-19 impact on consumption across formats

Increased time, stress and health concerns key drivers

Overall monthly nicotine use grew in 17 markets in 2021

Daily cigarette use continues to drop in most markets

E-vapour penetration plateaus in some markets

Heated tobacco incidence showing rapid growth

Pandemic has not reversed a trend to lower cigarette unit volumes

## FORMAT RELATIONSHIPS AND PLANNED CONSUMPTION CHANGES

E-vapour/cigarette dual use drops in key markets

Heated tobacco dual use continues to expand

Correlation between future consumption plans and risk profile

Motivations for consumption amendments remain stable

Heated tobacco grows as potential replacement for cigarettes

Do the intentions of sole cigarette users diverge from dual users?

Barriers to uptake of alternative delivery formats begin to fragment

## PUBLIC PERCEPTIONS AND ATTITUDES

Public overwhelmingly believes tobacco use amplifies transmission

Perception of e-cigarettes improves amongst non-users

Poor perception of safety of heated tobacco amongst non-users

The public holds generally conservative views on regulation

## SURVEY DETAIL

Nicotine Survey offers insight into significant industry topic areas

Unique features

Who we surveyed and what we asked

Country coverage: 20 markets surveyed

Yearly tracked data across three key topic areas

Data visualised through state-of-the-art dashboards

Range of research applications

## ABOUT OUR RESEARCH

Overview of Voice of the Consumer: Nicotine Survey

Nicotine Survey: FAQs

## ABOUT OUR RESEARCH

Strategic analysis for greater insight

Tell the whole story with Euromonitor International data

About Euromonitor International (1)

About Euromonitor International (2)

Our global research network

Our research expertise

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- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/nicotine-survey-2021-key-insights-and-system-overview/report](http://www.euromonitor.com/nicotine-survey-2021-key-insights-and-system-overview/report).