



Multi-Country Modern Oral Product (MOP) Consumption Survey (Pilot Study)

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AGENDA

- 1 Objectives
- 2 Study Design
- 3 Results
- 4 Discussion
- 5 Conclusions

Objectives

Context:

Due to the novel nature of Modern Oral Products (MOPs), there is very little published scientific information on the levels of consumption and usage behaviors in real-life settings.

Study Aims:

To describe product use behaviour and consumption patterns of MOPs users in Sweden, Denmark, Germany and Switzerland.

Key Research Areas:

Oral Nicotine Use History

Mouth Hold Duration

Nicotine Strength

Average Daily Consumption (ADC)

Flavour Preferences

Risk Perception

Study Design

Instrument

- ❑ Computer Assisted Web Interview (CAWI) approach, approximate took 15 – 20 minutes to complete
- ❑ Approved by Kantar Internal Independent Ethics Committee
- ❑ Translated in respective local languages (Swedish, Dutch, German, French and Italian)

Participant Population

- ❑ 500 current MOPs users (~100/150 each country)
- ❑ Daily users in Sweden, Daily/Weekly in Switzerland, Denmark and Germany

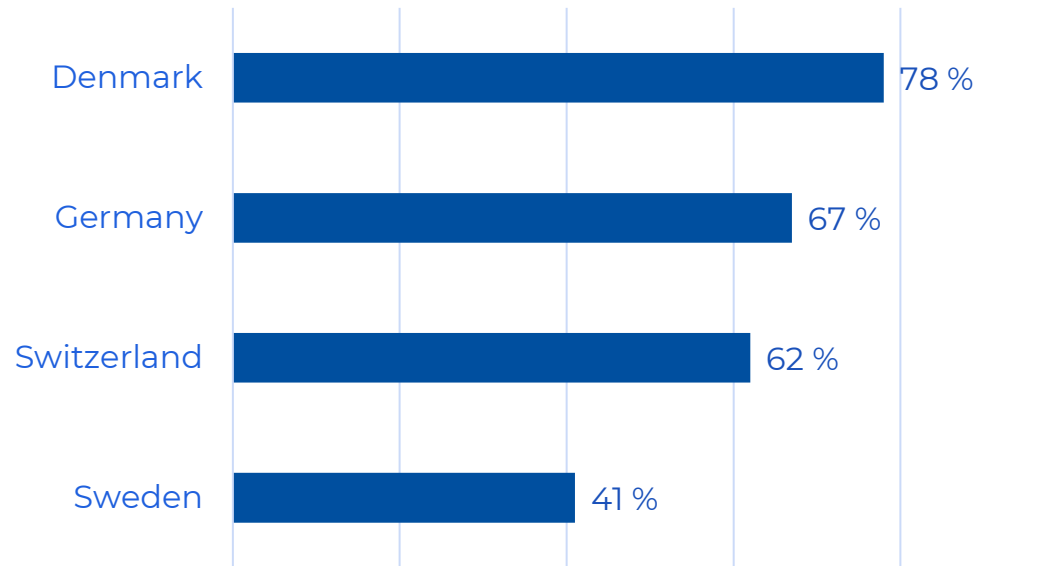
Participant Distribution

- ❑ Participants between the ages of 18 and 64 years were recruited, majority were in the 35–44-year old range.
- ❑ Overall population included more males than females (61 % versus 39 %), which was most pronounced in Denmark (76.2 % males)
- ❑ Across countries, the highest proportions of respondents were educated to at least further education and often university level.

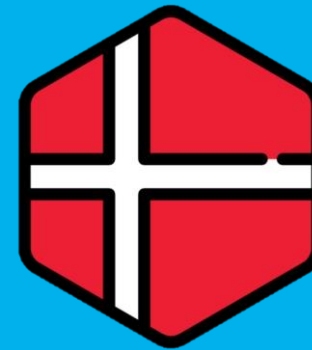
Time with Category

Rounded data

Percentage of participants (per country) that stated use of MOPs for 12 months or less



Majority of MOP users stated that they used the product for ≤ 12 months

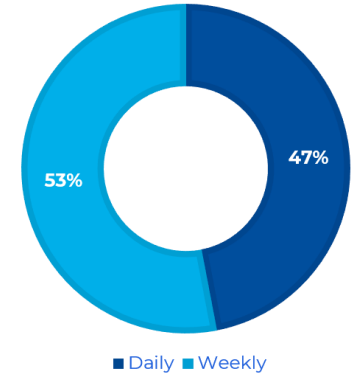
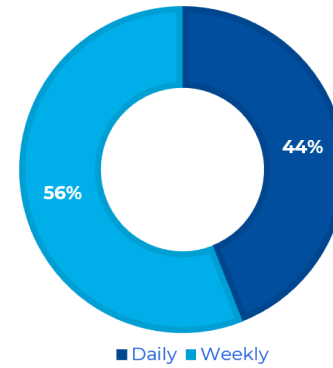
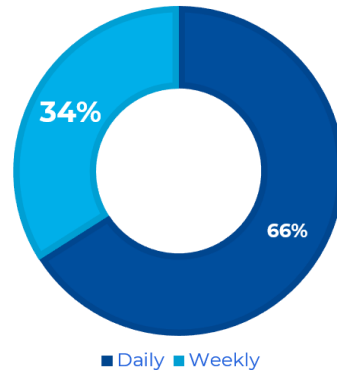
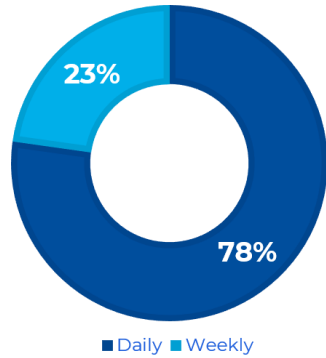


In Denmark, the highest proportion had used pouches for less than 3 months (48.5 %), whereas in Sweden 59 % of participants reported using them for at least 1 year with 8.6 % reporting use for longer than 5 years.

Consumption & Frequency

Average Daily Consumption (ADC) / Average Weekly Consumption (AWC)

Frequency



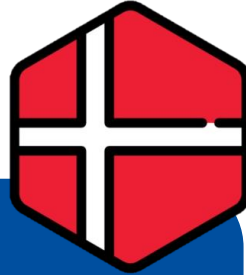
Sweden



8 pouches a day

2 pouches a week

Denmark



8 pouches a day

2 pouches a week

Germany



6 pouches a day

1 pouch a week

Switzerland



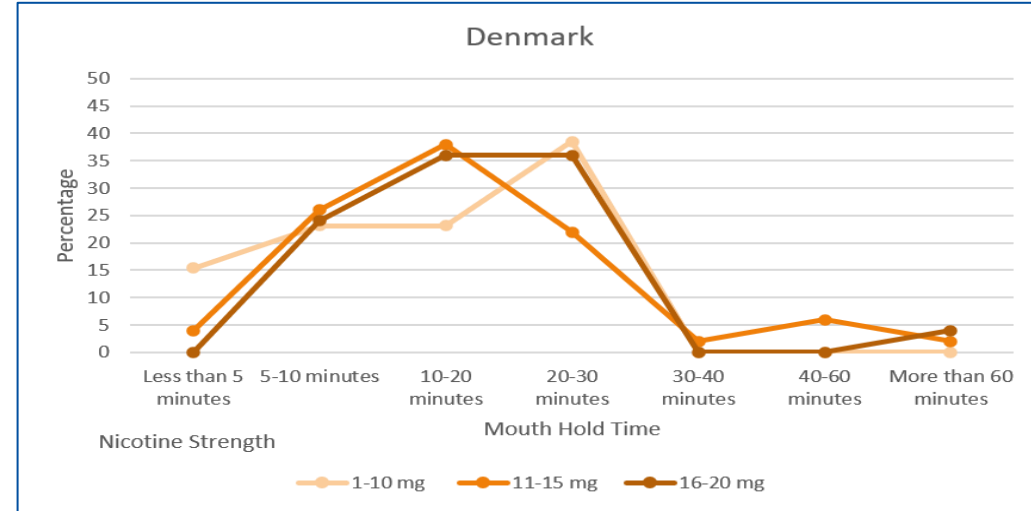
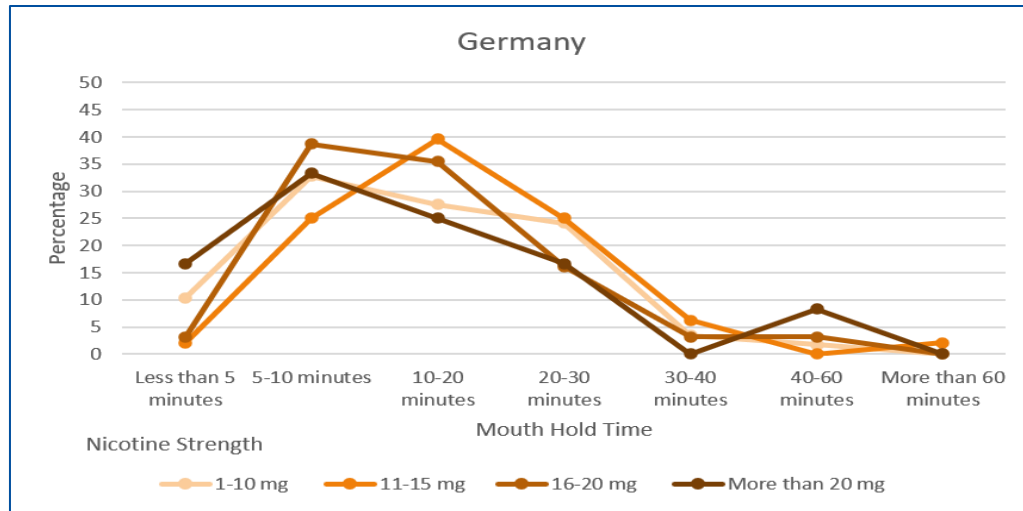
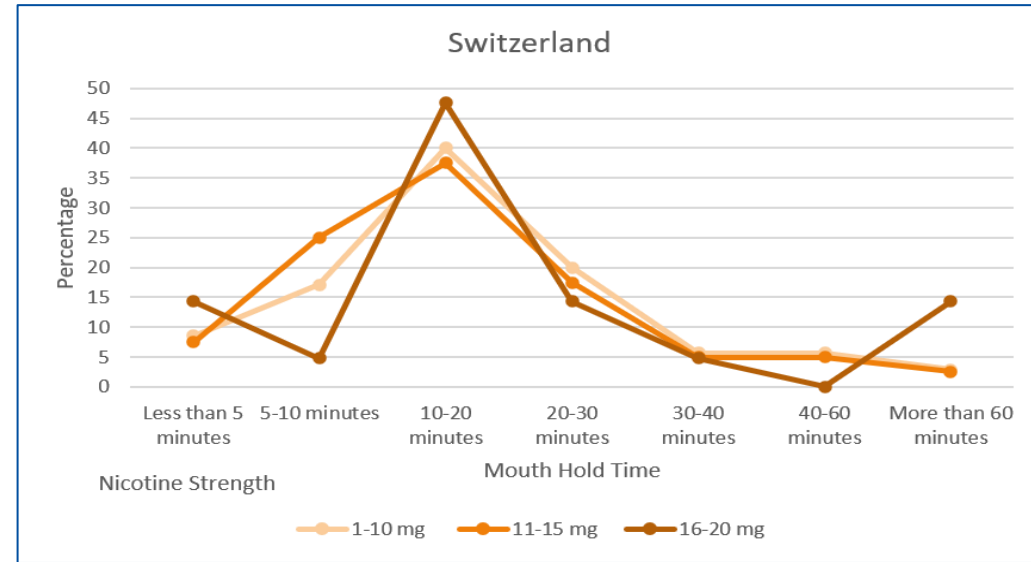
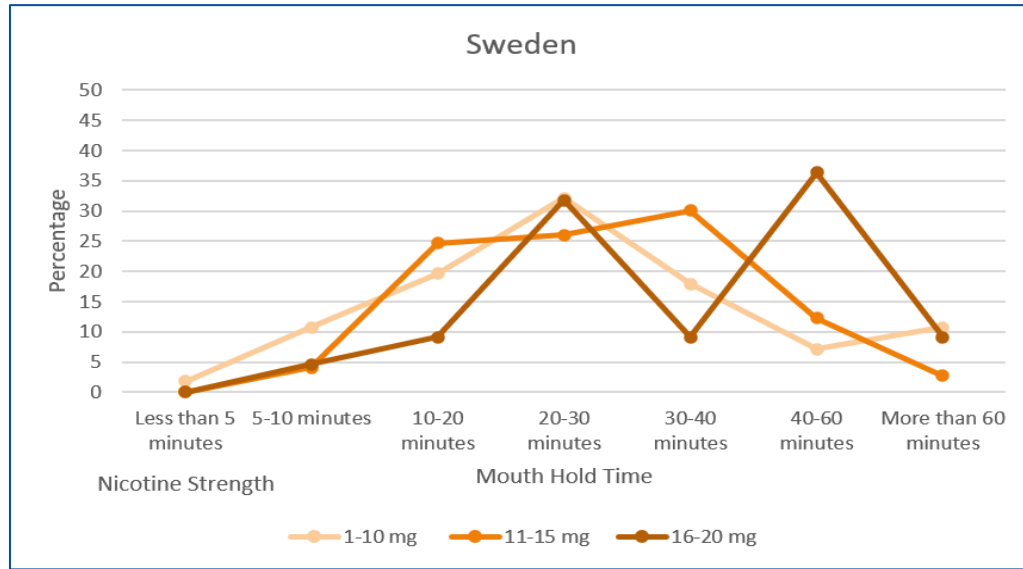
6 pouches a day

1 pouch a week

Mouth Hold Time & Nicotine Strength

	Sweden	Denmark	Germany	Switzerland
Most Popular	20-30 minutes	10-20 minutes	5-20 minutes	10-20 minutes
Minimum	17 minutes	8 minutes	11 minutes	13 minutes
Maximum	30 minutes	23 minutes	18 minutes	18 minutes
Nicotine Strengths	6-10 mg 11-15 mg	6-10 mg 11-15 mg	6-10 mg	6-10 mg
Higher Nicotine Strengths	14% used 16-20 mg	25% used 16-20 mg	20% used 16-20 mg	20% used 16-20 mg

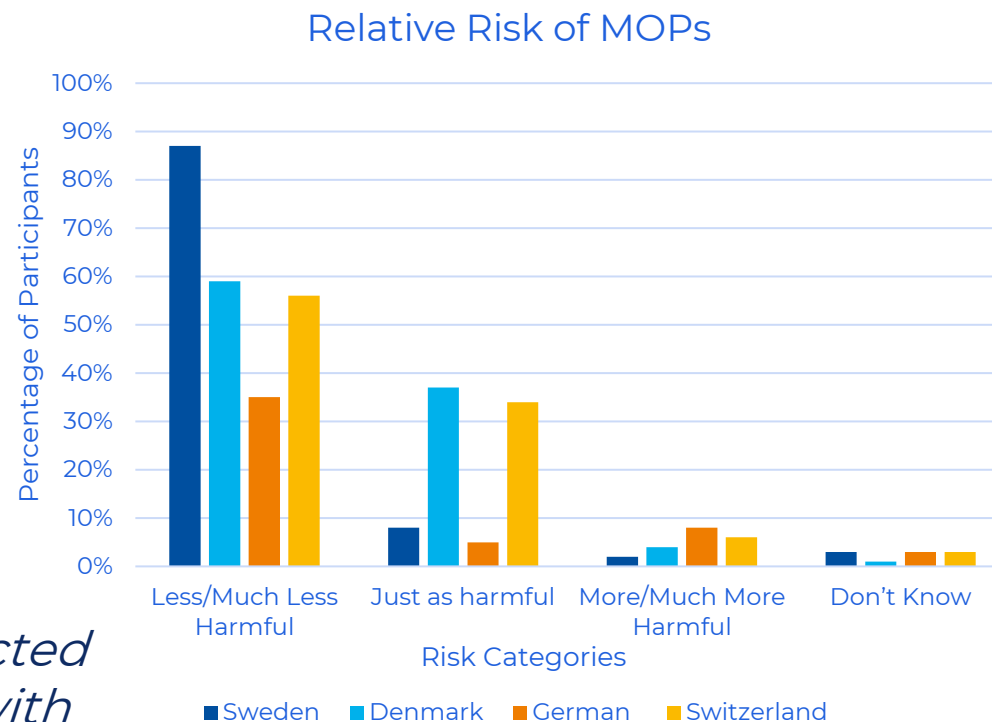
Nicotine Strength and Mouth Hold Time



Flavour, Risk Perception and Reasons for Removal



Menthol was most often selected flavour across all countries, with highest proportion in Denmark (79.2 %) followed by Switzerland (75.8 %), Sweden (61.6 %), and Germany (59.7 %).



Perception of risk showed that most participants believed that non-combustible tobacco and nicotine products, including cessation aids, were less harmful than cigarettes.



Top 3 reasons for removal:

- ❑ Loss of Taste
- ❑ To Eat/Drink
- ❑ Satisfied with Impact of Used Pouch

Discussion & Conclusion

- ❑ **Mouth hold time** was two-three times longer in Sweden than other countries, reflecting familiarity with snus.
- ❑ Most users opted for nicotine strengths in the **mid-range** 6-15 mg
- ❑ Majority favoured **mint/menthol** flavoured pouches.
- ❑ Perception of risk showed that most participants believed **that non-combustible** tobacco and nicotine products, including cessation aids, were **less harmful than cigarettes**.
- ❑ The findings of this study reflect the need to further investigate how different experience with product types can affect the use of new categories
- ❑ A limitation of the study is the **small sample size** of 500 oral nicotine pouch users, despite having sent invitations to 46,565 people.

Next Steps

- ❑ Extend Pilot Study learnings into full study with a larger sample size to confirm data on mouth hold time, average daily consumption, frequency of use, nicotine strength and risk perception.
- ❑ Additional research endpoints will be past and concurrent TNP consumption and change in CC use since pouch initiation.
- ❑ Study design will be updated to collect product use trajectories (to inform population health model) via a 6 month follow up.

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Thank you.
Any Questions?

