

ORAL NICOTINE USERS BEHAVIOUR STUDY

Research Report

Prepared by Ipsos

24 May, 2021

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GAME CHANGERS



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BACKGROUND

1



STUDY OBJECTIVES

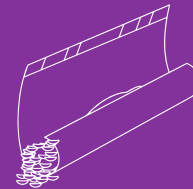
This study sought to:



1

Tobacco products

- Find out traditional tobacco products usage habits



2

Nicotine product category

- Establish nicotine product category used and number per day
- Unearth oral nicotine pouches types used
- Determine oral nicotine pouches usage journey
- Risk perceptions of cigarettes vs. currently used nicotine pouch
- Quitting smoking journey



3

Demographic Profile

Understand the demographic profile of oral nicotine users

- Gender
- Age
- Social Economic Class (SEC)
- Living Standard Measure (LSM)
- Profession/Occupation
- Education level
- Town of residence

SUMMARY OF METHODOLOGY

We approached the study as detailed below;

Strategy	Case Study
Data Collection Technique	Primary: Online Focus Group Discussions via MS Teams Secondary: Quantitative Profiling of Consumers
Target Group	<ul style="list-style-type: none">• Age:18-44 Years• Gender: Male & Female• Users of Oral Nicotine Pouches
Total number of participants	64
Study Location	Kenya



A close-up photograph of a person's hand, wearing a watch, pointing at a cluster of blue hexagonal tiles arranged on a wooden table. The tiles are arranged in a circular pattern, and the hand is pointing towards the center. The word "Findings" is overlaid in large white text across the center of the image, flanked by two horizontal white lines.

Findings

TRADITIONAL TOBACCO PRODUCTS

2

Usage behaviour



TRADITIONAL TOBACCO PRODUCTS STILL PREVALENT – DRIVEN BY THE CURRENT BAN OF SOME ORAL NICOTINE PRODUCTS

People occasionally use these products when they face financial difficulties and have to fulfil their need for nicotine stimulation

USAGE TIER 1



- Manufactured cigarettes

USAGE TIER 2



- Hand-rolled cigarettes

USAGE TIER 3



- Normally wrapped in dried banana leaf
- Local name: Bakekimo
- Kuber is a popular brand of loose snus

SNUFF/SNUS

USERS ARE COGNIZANT OF THE DANGERS OF SMOKING MANUFACTURED CIGARETTES

Nevertheless, despite the many frustrations experienced while smoking manufactured cigarettes, product stickiness and the ban of some oral nicotine products in Kenya promote continued usage



JOYS

- ✓ Nice sensation/stimulation
- ✓ Stress reduction
- ✓ Relaxation



FRUSTRATIONS

- ✗ Expensive
- ✗ Short-lived sensation
- ✗ After-smell
- ✗ Bad breath
- ✗ Teeth stain
- ✗ Knowledge of the resultant health risks
- ✗ Gender stigmatisation
- ✗ Sticks not waterproof
- ✗ Addictive nature
- ✗ Breathing difficulties
- ✗ Lowered productivity due to the overstimulation
- ✗ Affecting others through passive smoke
- ✗ Need to isolate self



IN THEIR OWN WORDS...



I must smoke a cigarette first thing in the morning, that is when I feel I am alive. It gives me stimulation, I feel good.”

18-24 years

When I smoke, I must hide because of gender stigmatisation. A woman being seen in public smoking looks like you are committing a big sin which stresses me.”

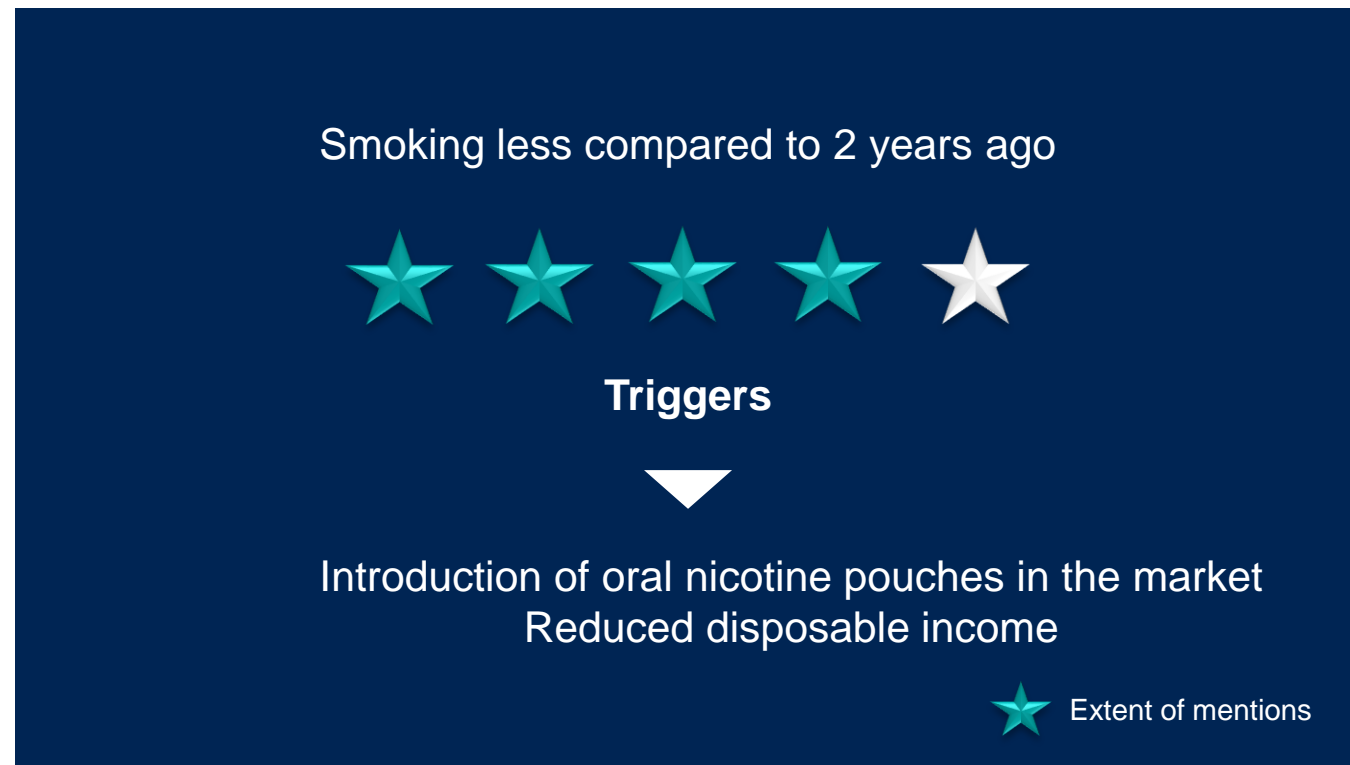
30-35 years

For me, the first frustration is the smoke. When I get to work, people complain but I am used to it, I don't care.”

25-29 years

WHEN ORAL NICOTINE POUCHES WERE INTRODUCED INTO THE KENYAN MARKET, THEY HELPED USERS IN THEIR JOURNEY TO SMOKE FEWER CIGARETTES

The temporary ban on oral nicotine pouches in the market frustrates many consumers, making them revert to smoking cigarettes



IN THEIR OWN WORDS...



Before, I was smoking more. I could even smoke one packet of cigarettes in a day. Introduction of oral nicotine pouches in the market made me to reduce smoking, then when they were banned, I found myself even smoking more than before. I just don't know how to stop smoking.”

Over 35 years

There were some nicotine pouches that came onto the market, and I used to take those most of the time and I somehow forgot about cigarettes. But when the nicotine pouches were banned, I went back to cigarettes.”

When nicotine pouches were introduced, I started smoking less. They made it easier to get the same sensation without having to smoke. Also, when you want to smoke, you have to isolate yourself but with the pouches, you can continue doing what you were doing.”

CUMBERSOME PREPARATION DISCOURAGES USAGE OF HAND-ROLLED CIGARETTES

Those who prefer hand-rolled cigarettes cite that they provide a better “kick” than manufactured cigarettes



JOYS

- ✓ Strong sensation/stimulation compared to manufactured cigarettes



FRUSTRATIONS

- ✗ Rolling is cumbersome
- ✗ Too much smoke
- ✗ Bad breath



“Rolling is a bit cumbersome. Also, I think it just has so much smoke; your hands will be smelling of tobacco and the breath is terrible.” **30-35 years**

ORAL NICOTINE

3



Oral nicotine usage behaviour

ORAL NICOTINE PRODUCTS USAGE DRIVEN BY BOTH INTRINSIC AND EXTRINSIC ATTRIBUTES

Notwithstanding the short existence of some oral nicotine products in the market, consumers shower them with a lot of praise, especially because these products help them smoke less manufactured cigarettes

INTRINSIC DRIVERS TO USAGE

- **Strong stimulation** – Consumers say oral nicotine products provide a quick kick
- **Flavours** – The flavours in the various oral nicotine products are a celebrated intrinsic attribute, especially because they solve one of the key cigarette dislikes, namely tobacco smell
- **Tobacco free** – This is another driver to usage as consumers deem these products to be a safer/healthier stimulant

EXTRINSIC DRIVERS TO USAGE

- **Withdrawal purposes** – Consumers trying to withdraw from manufactured cigarette smoking see oral nicotine products as a great and only alternative
- **Low-key nature** of oral nicotine products, especially the nicotine pouches, which look like chewing gum
 - The need to discreetly consume tobacco without inconveniencing others or exposing their 'bad' habit
 - Usage of the nicotine pouches, especially the all-white ones, is perceived to not impact the user's oral hygiene i.e., no staining or bad breath

CURRENT BAN OF SOME ORAL NICOTINE PRODUCTS IN KENYA RESTRICTING USAGE

Shisha and oral nicotine pouches are currently illegal in Kenya

HEATED TOBACCO PRODUCTS I.E., SHISHA



- High awareness of shisha in the oral nicotine products category
- Usage is occasional i.e., house parties because of its ban in public entertainment spots
- Preferred by some because of its classy image
- Variety of flavours gives it an edge
- Perceived as a more suitable product for women than men

E-CIGARETTES/VAPING PRODUCTS



- Perceived to be expensive, thus a luxury to most consumers, which contributes to low usage
- Those who use appreciate the classy image it portrays

ORAL NICOTINE POUCHES



- Consumers are well conversant with the all-white nicotine pouches (white nicotine filling in a white bag)
- Before the ban on oral nicotine pouches in Kenya, they had quickly become a cigarette alternative
- A few participants cited to have used a brown nicotine pouch (brown tobacco filling in a brown bag) brand called Thunder, but discontinued use because of its extremely high kick and experiencing nausea

DESPITE ITS BAN, SHISHA IS STILL SOLD IN VARIOUS ENTERTAINMENT VENUES

Smoking shisha is deemed to be 'cool' due to the sight of smoke billowing out of the mouth and nose. Although currently illegal in Kenya, consumers are able to get it in some public places as well as in their homes



JOYS

- ✓ Strong sensation/stimulation compared to manufactured cigarettes
- ✓ Variety of flavours
- ✓ Makes the user look classy



FRUSTRATIONS

- ✗ Perceived as a product mainly ideal for girls
- ✗ Currently illegal in Kenya
- ✗ Expensive



“The biggest joy for me is the highness and also it is a fun product to consume.” **18-24 years**

COST AND UNAVAILABILITY HAVE RENDERED E-CIGARETTES UNPOPULAR

There is a low usage incidence of e-cigarettes



JOYS

- ✓ Makes the user look classy
- ✓ Non-combustible

“E-cigarettes are fancy, when I take one out, everybody looks at me.”
30-35 years

FRUSTRATIONS

- ✗ Expensive
- ✗ Not readily available locally



“E-cigarettes are expensive, they are not for a hustler (someone struggling financially).” **Over 35 years**

TOBACCO FREE AND WITHDRAWAL PURPOSES ARE KEY DRIVERS TO USAGE OF ALL-WHITE NICOTINE POUCHES

The pros of using the all-white/tobacco free nicotine pouches far outweigh the cons



JOYS

- ✓ Strong sensation/stimulation
- ✓ Offers a quick 'kick' within minutes of use
- ✓ Tobacco-free
- ✓ No tobacco smell
- ✓ Nice aroma
- ✓ Diversity of flavours
- ✓ No teeth stain
- ✓ Concealable, thus can be consumed in public (looks like chewing gum)
- ✓ Long lasting
- ✓ No smoke exposure to others
- ✓ Recyclable containers
- ✓ No bad breath/taste in the mouth

FRUSTRATIONS

- ✗ Expensive (compared to manufactured cigarettes)
- ✗ Unavailability/withdrawn from the market
- ✗ Poor distribution before withdrawal from the market
- ✗ The price fluctuated depending on location (used to be cheaper in Nairobi than other locations like Mombasa)



IN THEIR OWN WORDS...



Personally, I thought oral nicotine pouches would be my substitution to smoking cigarettes. When it came onto the market, I felt for the first time in Kenyan history I had a product that would prevent me from smoking cigarettes.”

30-35 years

Oral nicotine pouches do not have that smoky smell. I really liked it a lot.”

30-35 years

ALL-WHITE NICOTINE POUCHES HAVE SEVERAL TRIAL AND CONTINUED USAGE TRIGGERS

Curiosity was a big trial trigger. The drivers for continued usage include:



As a substitute for manufactured cigarettes

- For the majority of consumers, their motivation to continue using the all-white nicotine pouch was the fact that it aided them in their cigarette quitting journey



Ease of usage/ low-key nature

- Another motivation to continued usage was that the all-white nicotine pouch did not require a lot of work to use – it is just placed between the gums and lip
- It can also be used discreetly



Safer to use vs. manufactured cigarettes

- Consumers deem oral nicotine pouches a healthier stimulant compared to manufactured cigarettes

THE WITHDRAWAL OF ALL-WHITE NICOTINE POUCHES AFFECTED CONSUMER USAGE JOURNEY

Consumers engaged with the product for a short duration before its withdrawal from the Kenyan market



Usage frequency

Before its ban, consumers used the pouches **daily**, which helped many in their cigarette quitting journey.

However, some still smoked and used the pouch at different times of the day as cigarette smoking is entrenched in their lives.



Number of pouches used per occasion

All consumers cited that they would use one pouch at a time and use between 2-5 pouches in a day.

Interestingly, some users would re-use a pouch later after removing from the mouth if they thought the nicotine hadn't been fully depleted.



Usage habits

Oral nicotine is used in varied ways, with the biggest consideration being to ensure not to swallow the pouch

- Between the gum and upper lip
- Between the gum and lower lip
- Between the gum and side of the mouth
- Under the tongue



Duration of usage

The usage duration is subjective and dependent on how stimulated the user feels

- Minimum usage duration: Approximately 10-15 minutes
- Maximum usage duration: About 20 minutes

IN THEIR OWN WORDS...



The person who introduced nicotine pouches to me did not tell me the minimum or maximum duration that I should have it in my mouth, I was just told that when the steam is over I remove it. In fact, the first day I got one, I stayed with it for 30 minutes.”

25-29 years

I would put it under the lower lip, sometimes under the tongue or even sideways, depending on the way I felt like placing it.”

30-35 years

If I’m using the pouch and I must do something like go to a meeting while in the office, I would remove and re-use it later. And the good thing about it, it does not have any dirt, it does not stain your teeth, so I used to be good.”

30-35 years

BECAUSE OF THE SUDDEN BAN ON ORAL NICOTINE POUCHES, CONSUMERS HAD NOT INTERACTED WITH THEM LONG ENOUGH

Consumers have not interacted with many brands of all-white oral nicotine pouches

FLAVOURS AWARE OF

Berry Frost
Tropical
Menthol/Mint

FLAVOURS EVER USED

Berry Frost
Tropical

FLAVOUR USED MOST OFTEN

Tropical

Was readily available
Nice menthol taste

“Tropical is the one that I would mainly get around where I stay. The Berry Frost was not very common.”

30-35 years

ORAL NICOTINE POUCHES CONSIDERED AS AN IDEAL CIGARETTE SUBSTITUTE

Usage was driven by the need to cut down on smoking



LIKES



- Ideal substitute for manufactured cigarettes i.e., gives user similar effects as cigarettes
- Discreet
 - Can be used without inconveniencing other people i.e., no emission of smoke
 - Easy to use i.e., placing pouch under the lip
- Convenient to use i.e., portable and can be used anywhere
- Highly stimulating i.e., the effects last longer than cigarettes
- Nicotine pouches are perceived as classy and aspirational, giving the user a 'cool' image
- Perceived to have a less negative impact than cigarettes
- Appealing flavours i.e., Berry Frost and Tropical

DISLIKES




- Due the ban, nicotine pouches are no longer available
- Perceived to be more expensive compared to manufactured cigarettes
- Users said pouches caused headaches
- Limited availability i.e., nicotine pouches were only available at the supermarket and not at other retail outlets

IN THEIR OWN WORDS...



For me, a nicotine pouch is easier to use, it does not burn you the way cigarettes do. It will also not stain your teeth. I found that a few of my friends are ok using it and that is what convinced me to start using it.”

18-24 years

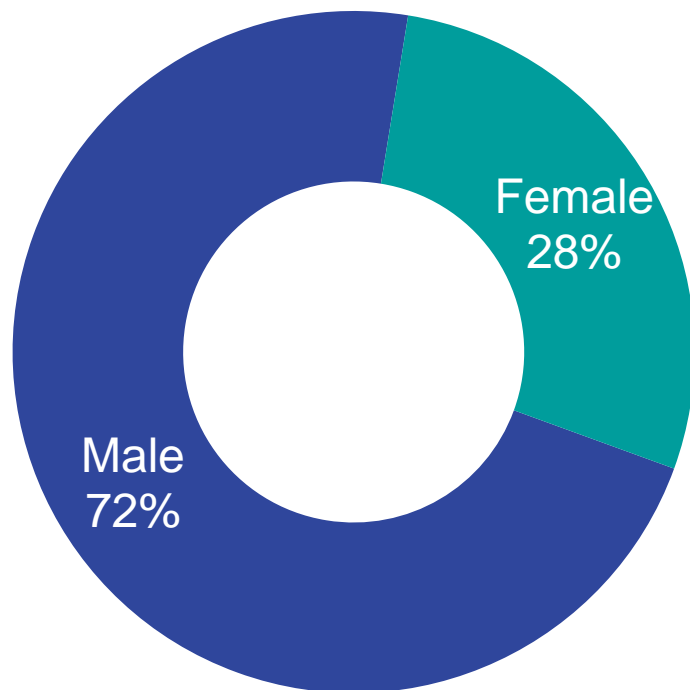


Oral nicotine pouches user profile

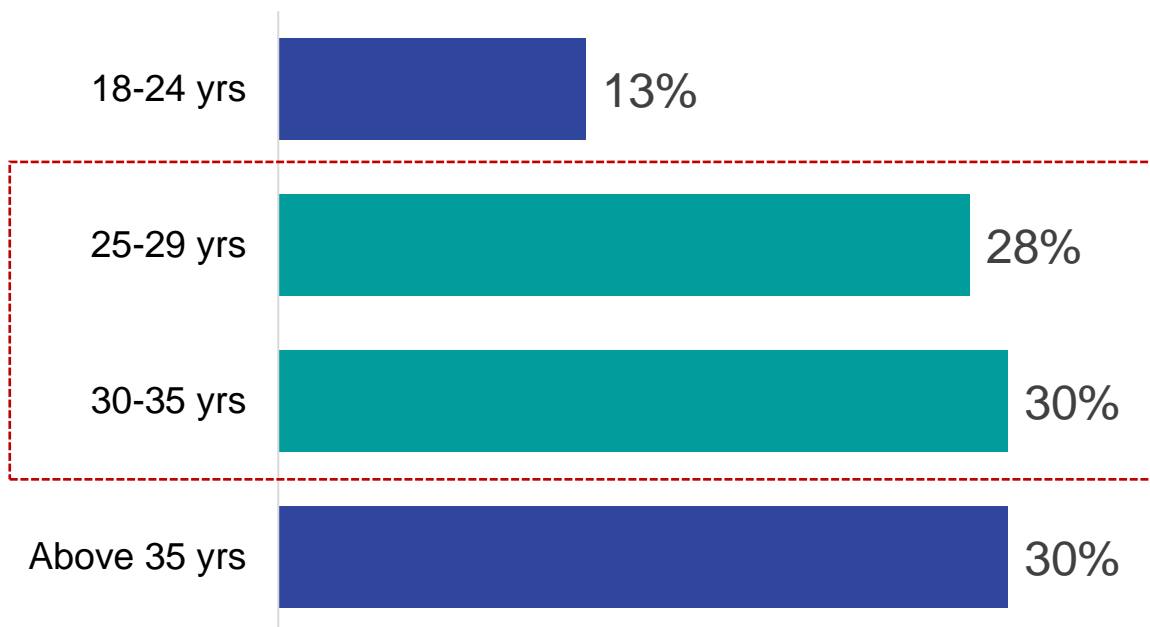
UPTAKE OF ORAL NICOTINE POUCHES

Higher among male than female

GENDER



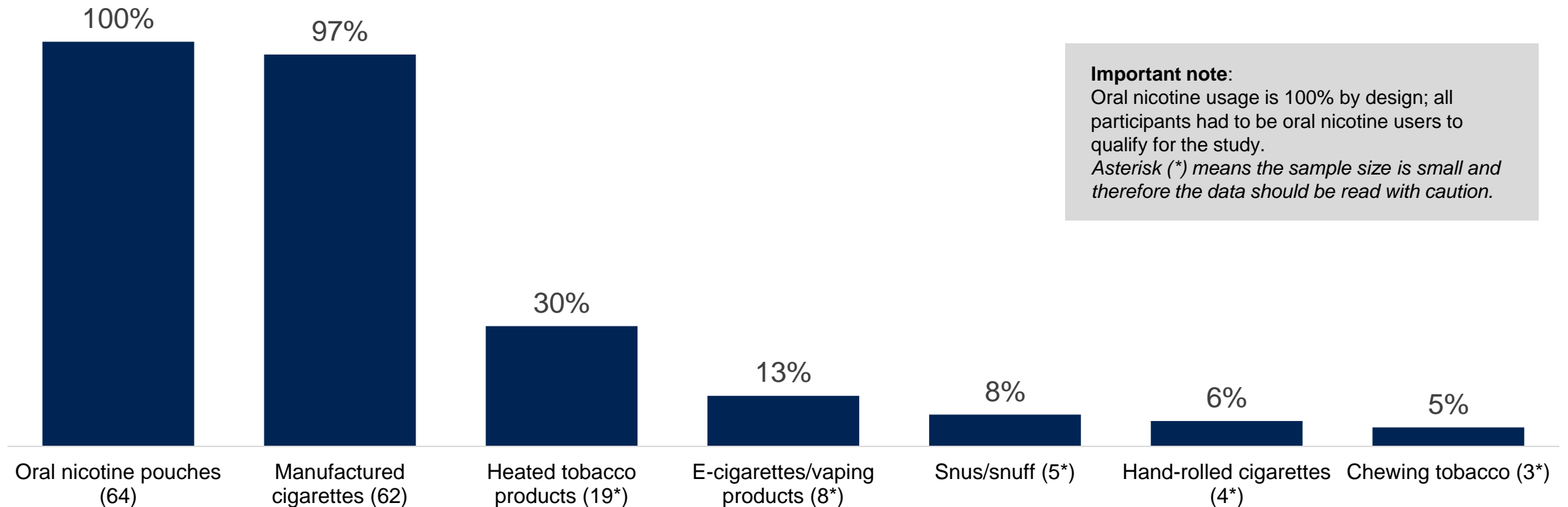
AGE



Base n=64; All participants

ORAL NICOTINE POUCH USERS STILL SMOKING CIGARETTES LARGELY DRIVEN BY ITS BAN IN KENYA

Products consumed in the last 30 days (except for oral nicotine, which refers to usage in the past year)



Important note:
Oral nicotine usage is 100% by design; all participants had to be oral nicotine users to qualify for the study.
Asterisk () means the sample size is small and therefore the data should be read with caution.*

Base n= Indicated against each product



3 OUT OF 4 ORAL NICOTINE POUCH USERS WOULD TAKE LESS THAN 5 POUCHES A DAY

Products consumed – Average Daily Consumption

	Oral nicotine pouches	Manufactured cigarettes sticks	Heated tobacco products sticks	E-cigarette's cartridges	Snus/snuff portions	Hand-rolled cigarettes sticks	Chewing tobacco bags/pouches
Base	64	62	19*	8*	5*	4*	3*
Less than 5	75%	35%	89%	25%	80%	75%	67%
5 to 8	20%	34%	-	63%	-	25%	-
8 to 10	3%	27%	-	-	-	-	-
More than 10	2%	3%	-	-	20%	-	33%
I don't know/can't tell	-	-	11%	13%	-	-	-

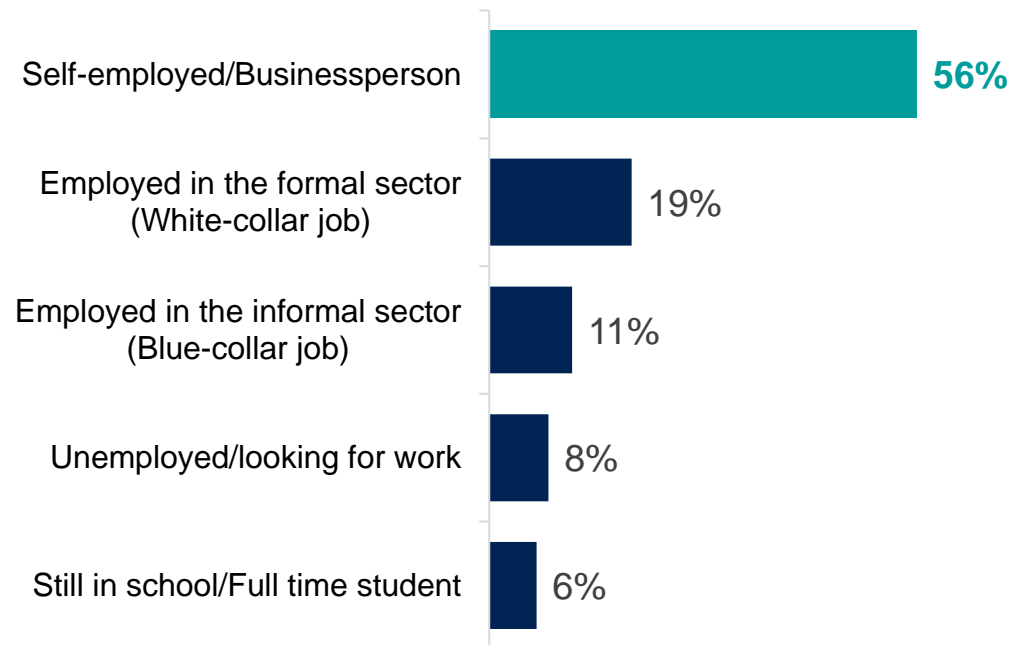
Important note:

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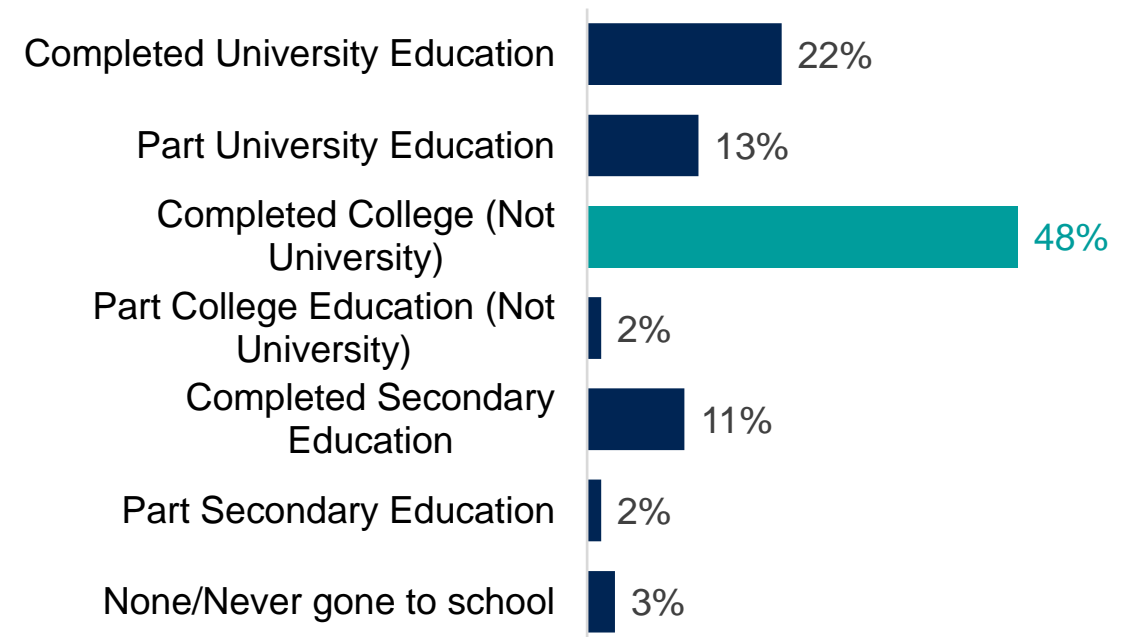
A NOTEWORTHY PROPORTION OF ORAL NICOTINE POUCH

Users are college-educated business people

EMPLOYMENT STATUS



EDUCATION LEVEL



Base n=64; All participants

ORAL NICOTINE POUCH USERS ARE IN HIGH AND MID SOCIAL CLASSES

Living standard measure (LSM) & socio-economic class (SEC)

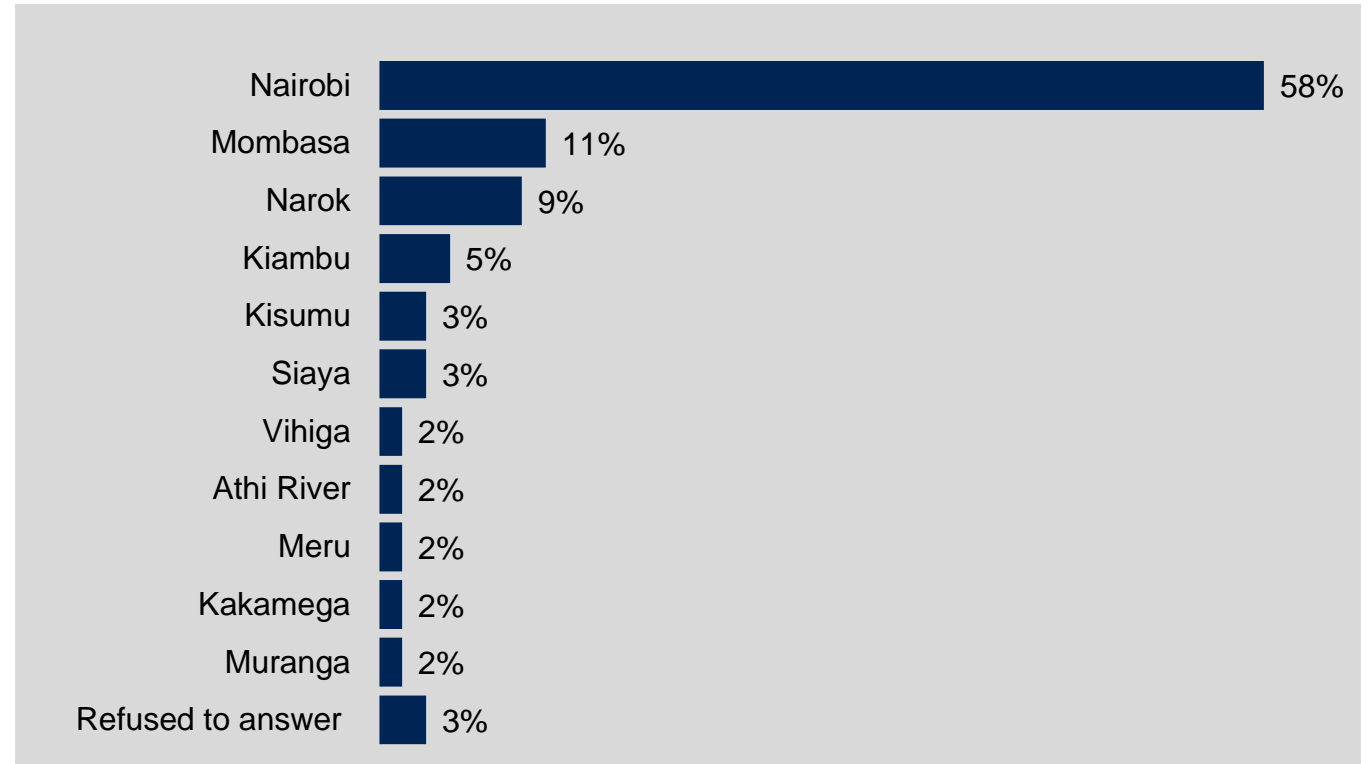



LSM	Total	SEC
8	2%	C1
9	2%	
10	3%	
11	3%	
12	17%	AB
13	22%	
14	23%	
15	17%	
16	5%	
17	6%	

Base n=64; All participants

UPTAKE OF ORAL NICOTINE POUCHES IS HIGHER AMONG URBAN DWELLERS

Current town of residence





The typical oral
nicotine pouch
user in Kenya
is...

An economically
empowered urban
male youth.

RISK PERCEPTIONS ON USAGE

4

Manufactured cigarettes vs. oral nicotine pouches

CONSUMERS ARE WELL AWARE OF THE RISKS OF CIGARETTE SMOKING

Nevertheless, although some are struggling to quit, being addicted to the nicotine in tobacco makes quitting a difficult task

As per consumer feedback, systems within the human anatomy that are at risk due to cigarette smoking include:



Oral system

- Causes cavities
- Loosens teeth
- Stains the teeth
- Causes bad breath



Respiratory system

- Predisposes one to tuberculosis
- Causes shortness of breath
- Leads to lung cancer
- Causes chronic bronchitis



Reproductive system

- Causes infertility
- Causes impotence
- Causes miscarriages



Circulatory system

- Causes heart disease

OLDER SMOKERS ARE MORE WORRIED ABOUT DISEASE-SPECIFIC RISKS

While younger smokers' top concern is addiction

Manufactured cigarettes side effects	RANKING BY AGE				OVERALL RANKING
	18-24 Yrs	25-29 Yrs	30-35 Yrs	Over 35 Yrs	
Addiction	1	1	2	5	1
Disease-specific risks	5	3	1	1	2
Stained teeth	3	12	8	9	8
Loss of sense of taste	8	8	7	7	7
Loss of sense of smell	10	7	9	11	9
Bad breath	7	12	11	8	10
Bad taste in the mouth	9	11	12	8	11
Poor gum health	6	10	5	6	6
Eye irritation	12	6	6	13	9
Face aging	14	9	7	12	12
Stains on skin/hands	11	12	11	10	13
Wheezing	2	4	9	3	4
Coughing	2	2	10	2	3
Elevated heart rate	4	3	3	6	3
Reduced athletic ability	13	5	4	4	5

MOST CONSUMERS DON'T ASSOCIATE ORAL NICOTINE POUCHES WITH ANY SIDE EFFECTS

However, a few consumers cited some **perceived** side effects, which could only be verified after lengthy usage. Overall, consumers **unanimously agreed that oral nicotine pouches have fewer side effects compared to manufactured cigarettes**



SIDE EFFECTS




- Teeth damage through corrosion
- Lip and gum damage through blistering
- Causes constipation if many pouches are used

“I don’t think there are any side effects. I think the oral nicotine pouch is very good.” **18-24 Years**

“We have been taught that cancer is caused by smoke that goes to the lungs, but nicotine pouches don’t have smoke so if you give me those pouches, I am okay.” **25-29 years**

GRAPHIC WARNINGS ON PACKS WILL NOT DETER USAGE

Although graphic warnings on packs educate and remind consumers of the side-effects of the products, they do not affect product usage in any way. Users always choose to ignore those warnings.



LIKELY IMPACT OF GRAPHIC WARNINGS ON ORAL NICOTINE PACKS

- ✓ Use less
- ✓ Use same/no impact
- ✓ Use more



IN THEIR OWN WORDS...



I use what is inside, whatever is written on the pack does not concern me.”

25-29 years

Even on cigarette packs, we normally see the same graphic warnings and we still take the cigarettes.”

30-35 years

Honestly speaking, if the graphic warnings on packets of cigarettes have never deterred anyone from smoking, I doubt that graphic warnings on oral nicotine pouch packs would work.”

Above 35 years

CONCLUSIONS

5

CONCLUSIONS

- The use of manufactured cigarettes is still prevalent, with most users admitting that they are addicted and struggling to quit despite being cognisant of the many side effects
- The societal disapproval of manufactured cigarettes usage causes many users to use the product in secret, especially female smokers
- The introduction of oral nicotine pouches in 2019, which was deemed to have fewer side effects than cigarettes, resulted in quick uptake among cigarette smokers who had been struggling to quit. Many referred to nicotine pouches as the perfect alternative to smoking cigarettes
- Because of oral nicotine pouches, most cigarette smokers admitted to have reduced smoking until the pouches were banned in 2020, which resulted in them reverting to cigarettes



Appendix

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- Ipsos Kenya is a key members the Market and Social Research Association of Kenya
- MSRA is an industry regulating organisation that was forged to drive quality assurance.

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- The ESOMAR Membership mark signals an endorsement of ethical standards and provides a valued means of recognition within the wider marketing and research industries.

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- Our methods & practices are as per ISO. We are in compliance with ISO 20252:2012

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GAME CHANGERS

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You act better when you are sure.

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SURE.
ACT
SMARTER.**

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