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Menthol Cigarettes and the Initiation of Smoking: A White Paper

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ABSTRACT

Publicly available internal tobacco industry documents were analyzed to answer the following questions regarding menthol cigarettes and the uptake of smoking by youth: 1) Does menthol make it easier for young or new/inexperienced smokers to start smoking cigarettes? 2) Do menthol smokers start smoking earlier than non-menthol smokers? Is there a higher use among youth who have been smoking for less than one year? 3) Did current smokers start smoking menthol cigarettes before switching to non-menthol cigarettes? 4) Does menthol accelerate progression toward established smoking? 5) Did the tobacco industry market menthols to the youth market and what images did they use? 6) To what extent do non-menthol smokers use menthol cigarettes? Researchers reviewed 2,634 documents and 102 were deemed relevant to one or more of the research questions.

The internal business records of the tobacco industry make it clear that menthol flavoring is added to cigarettes in part because it is known to be an attractive feature to inexperienced, primarily youthful smokers who perceive menthol flavored cigarettes to be less harsh and easier to smoke and because of their availability from friends and family. Secondly, the tobacco industry found that some youth smoke menthols because they perceive them to be less harmful than non-menthol cigarettes. Because of the acknowledged importance of capturing a large share of the youth market to long term profitability, all of the major cigarette companies have introduced menthol brands. A key product design issue concerned whether to increase brand menthol levels to appeal to the taste preferences of long-term menthol smokers or keep menthol levels lower to appeal to inexperienced smokers.

Internal marketing studies showed that the companies carefully researched the menthol segment of the market with an eye towards recruiting younger smokers to their brands. The tobacco industry tracked menthol cigarette usage by age, gender and race to inform product development and marketing decisions. Studies were done to test how menthol impacted the ease of smoking, consumer perceptions of menthol flavoring, and brand loyalty. Based upon this review, menthol as a characterizing flavor has been a prominent design feature used by cigarette manufacturers to attract and retain youthful smokers.

INTRODUCTION

The Family Smoking Prevention and Tobacco Control Act gives the US Food and Drug Administration (FDA) regulatory authority over tobacco products. On September 22, 2009, the FDA exercised this authority when it announced the ban of some cigarette flavorings. However, this ban did not include menthol, as it was excluded from the list of banned flavorings originally identified in the Act. Menthol's exclusion from the list of prohibited flavor additives in cigarettes has promoted discussion among many in the public health arena.¹ The Act included a requirement to create the Tobacco Products Scientific Advisory Committee (TPSAC) within the FDA's Center for Tobacco Products. TPSAC is charged with advising the FDA Commissioner on the regulation of tobacco products, including the use of menthol as a cigarette ingredient and the impact of mentholated cigarettes on public health, with special attention given to children, African Americans, Hispanics and other racial and ethnic minorities.

The wide use of menthol in cigarettes is due to its minty flavor, aroma, cooling characteristics and physiological effects on the smoker.^{2,3} The isomer l-menthol is the largest component of peppermint oil extracted from the two significant types of peppermint plants, *Mentha piperita* and *Mentha arvensis*. There are significant taste differences among the various isomers. Only l-menthol imparts the well-known mint-like taste and desired cooling effect.³ The concentration of menthol in tobacco products varies according to the product and the flavor desired, but is present in 90% of all tobacco products, both "mentholated" and "non-mentholated."^{3,4}

The market-share of filter-tipped mentholated products has ranged from 1.1% in 1956 to 27.3% in 1983 to 20% in 2006.³ Available data currently show that past month use of mentholated brands among cigarette smokers aged 12 or older varies by race and ethnicity:⁵

- 82.6% African American
- 53.2% Native Hawaiian
- 32.3% Hispanic
- 31.2% Asian
- 24.8% American Indian/Alaska Native
- 23.8% non-Hispanic white

Although menthol is an FDA-approved food additive, the FDA is now evaluating its use in cigarettes and has requested a review of tobacco industry documents to answer questions regarding a number of menthol-related topics: dependence; topography; cessation; health effects; and marketing and consumer perceptions. This paper will address the following questions asked by FDA staff related to the role of menthol in the uptake of cigarette smoking:

1. Does menthol make it easier for young or new/inexperienced smokers to start smoking cigarettes?
2. Do menthol smokers start smoking earlier than non-menthol smokers? Is there a higher use among youth who have been smoking for less than one year?
3. Did current smokers start smoking menthol cigarettes before switching to non-menthol cigarettes?
4. Does menthol accelerate progression toward established smoking?

Additional questions, arising from the initial research, are also addressed:

1. Did the tobacco industry market menthol cigarettes to the youth market and what images did they use?
2. To what extent do non-menthol smokers use menthol cigarettes?

Some of the issues covered in this paper such as consumer perceptions and the demographics of menthol smokers will be covered in other white papers, however, this paper reviews these topics only insofar as they relate specifically to smokers under age 25.

METHODS

In this qualitative research study of the digitized repository of previously internal tobacco industry documents, a snowball sampling design was used to search the Legacy Tobacco Documents Library (LTDL) (<http://legacy.library.ucsf.edu>).⁶ We systematically searched the LTDL between February and April 2010, utilizing standard documents research techniques. These techniques combine traditional qualitative methods with iterative search strategies tailored for the LTDL data set.⁷

Based on the FDA staff-supplied research questions (see INTRODUCTION above), initial keyword searches combined terms related to: menthol, initiation, “young adult,” “younger adult” and “starter product.” This initial set of keywords and phrases resulted in the development of further search terms and combinations of keywords (e.g., “smoking behavior,” Kool, Newport, Salem, candy, “soothing effect” and irritation). Documents from all United States and international companies were searched and document dates were not limited.

Of the approximately 11 million documents available in the LTDL, the iterative searches returned hundreds of thousands of results (see Appendix). For example, a search of all tobacco industry document collections on the LTDL for the keyword “menthol” alone would yield over 800,000 documents. The results that are returned in the LTDL include multiple copies of many documents, so researchers must decide which irrelevant and duplicate documents to exclude. Relevance was based on whether, upon electronically searching or reading a document, it included content related to the topic or the specific questions presented by the FDA staff. Tobacco companies investigated issues in order to increase their share of market, rather than to understand public health issues; thus many of the tens of thousands of returned documents with these search terms did not appear to be directly relevant.

For each set of results, the researchers reviewed the first 100-200 documents. If documents did not appear to be relevant to the research questions, or if there was a repetitive pattern of documents, the researchers moved on to the next search term. Among the reports, correspondence, and studies conducted by product development and research departments of the major tobacco companies (American Tobacco, British American Tobacco (BAT), Brown & Williamson, Lorillard, Philip Morris, and RJ Reynolds), relevant documents were found in the following subject areas: menthol and initiation, switching, marketing and target markets. A final collection of 102 documents were deemed relevant to one or more of the research questions. Memos were written to summarize the relevant documents to further narrow down to the 49 relevant documents that are cited in this white paper. The Appendix details the results of the searches and the number of documents screened and further reviewed.

Limitations

Tobacco industry document research presents unique challenges and results should be interpreted within the context of known limitations, such as the vast number of available documents, time restrictions, and the use of code words and acronyms.⁶

The sheer quantity of available documents (over 60 million pages) forces researchers to make decisions about which search terms retrieve the most relevant material. Further, the LTDL is frequently updated as tobacco companies provide additional material and documents become available through litigation. The document searches were conducted over a seven week period. Given the short period of time for conducting this project (LTDL archival research often takes a year or more to complete), the research team had to strategically screen the documents through the process discussed above.

In analyzing the documents in a limited timeframe, context may have been lost and, therefore, this white paper cannot be a comprehensive report of all documents related to how menthol affects the uptake of smoking. Understanding the time period when a document was written, who wrote a document, why a document was written, or why a study was performed requires time for reviewing and linking documents together. It is also difficult to compare statistics gathered using different methodologies used by numerous companies over several decades.

Even if there had been more time for searching, it is unlikely that a complete picture of the tobacco industry's research about menthol and initiation of cigarette use could be compiled. There is evidence that the industry tried to hide its findings, although it is unclear from whom. For example, in a 1974 BAT memo about a visit to BIBRA, a toxicology consulting firm, it was noted that "Reference to menthol should be omitted from such documents [invoices], which should refer generally to toxicity studies."⁸ Brown and Williamson used the code terms, such as "Kintolly," "Tolkin," "Harpat," "Polar Bear," and "Cenmap" when referring to menthol.⁹ Searches using these code terms did not reveal any evidence about menthol and initiation but other code names as yet unknown may reveal more. Acronyms were also commonly used, which are often unclear if the context is unknown.

Research in the LTDL typically involves repeating the iterative search process (including searching all code words and acronyms we learn through the process) until we reach saturation of both keywords and documents. Unfortunately, we could not reach saturation for this white paper; however, the documentary evidence presented in this paper supports our primary findings.

RESULTS

Table 1 summarizes the research questions and the basic findings.

Table 1: RESEARCH QUESTIONS AND BASIC FINDINGS	
Question	Summary of finding based on review
1) Does menthol make it easier for young or new/inexperienced smokers to start smoking cigarettes?	Yes, company business records confirm that menthol is among the design features that make smoking more attractive to inexperienced, primarily youthful smokers who perceive menthol flavored cigarettes to be less harsh and easier to smoke.
2) Do menthol smokers start smoking earlier than non-menthol smokers?	There was no evidence of a difference in age of initiation for menthol and non-menthol. Most smoking begins between the ages of 12 to 24 years; fewer than 5% start smoking after age 25.
3) Did current smokers start smoking menthol cigarettes before switching to non-menthol cigarettes?	Youth tend to smoke brands to which they have access through family or friends but relatively few people switch from menthol to non-menthol after they become confirmed menthol smokers.
4) Does menthol accelerate progression toward established smoking?	The industry expected that people who started smoking menthol cigarettes would become regular, daily smokers but no evidence was found that the industry expected menthol cigarette smokers to more quickly become established smokers.
5) Did the tobacco industry market menthol cigarettes to the youth market and what images did they use?	Yes, menthol is an important design feature which is known by the industry to be attractive to beginning smokers (including teens). Marketing imagery for menthol brands was geared to reflect themes relevant to a young target audience.
6) To what extent do non-menthol smokers use menthol cigarettes?	Non-menthol smokers will use menthol when they are sick because of the perceived lower harshness of the smoke.

I. Does menthol make it easier for young or new/inexperienced smokers to start smoking cigarettes?

Yes, company business records confirm that menthol is among the design features that make smoking more attractive to inexperienced, primarily youthful smokers who find menthol flavored cigarettes to be less harsh and easier to smoke, more accessible from friends and family or perceive them to be less harmful to their health.

As early as the 1960s, tobacco companies conducted studies of smokers that included data about menthol cigarettes. At that point in time, menthol cigarettes were not particularly associated with youth smoking. A Philip Morris study about the effect of cigarette packaging on smoking behavior and motivation made no mention of menthol in connection with inexperienced smokers;

instead they found that people viewed menthol cigarettes as more commonly smoked by adult women and “a change of pace” product for men.¹⁰ An RJ Reynolds postcard survey of smokers in 1962 did collect data on age and discovered that a large majority of young men and women had tried menthols and confirmed the perception that female smokers preferred them more than male smokers.¹¹

	have ever <u>smoked menthol</u>	have smoked menthol <u>in past 6 months</u>	now prefer <u>menthol</u>
Under 21	72.3%	53.8%	18.3%
Men < 21	67%	45.7%,	10.8%
Women < 21	81.3%	67.7%	31.0%

By 1973, Philip Morris also noticed that menthols were becoming popular among new smokers. Their analysis included race as a factor as well.

There is currently a very strong trend among young smokers (both White and Black) toward the use of menthol cigarettes, especially Kool. We have seen surprisingly [sic] high figures for menthol usage among young smokers in several recent surveys in Milwaukee, Oklahoma City and Seattle.¹²

It wasn't until the mid-1970s, though, that the manufacturers of the most popular menthol brands, as well as other companies, started conducting focus groups designed specifically to learn why people started smoking menthols. Motivations for obtaining this data varied. Sometimes it was because they were contemplating the introduction of a new menthol brand or brand extension,¹³⁻¹⁵ other times it was to refine their existing menthol product(s) and/or marketing strategies{{ 1001 Nicholas Research Intl. 1981; 965 Anonymous 1978; 958 Anonymous 1984}} and in some cases it was because they wanted to know why a competitor's menthol market share was growing.¹⁷

Interested in pursuing information about the movement towards menthol use among people under age 25 and concerned about how that might affect their Marlboro franchise, Philip Morris commissioned a large-scale study in 1974. The Roper Organization conducted interviews with 1050 African American and white smokers in 35 locations across the country. They gave their interviewers instructions not to speak with anyone over age 24, but they placed no lower age limit restrictions on subjects. It is not possible to determine how many teenagers were surveyed but one of the categories of analysis was an “under 18” age group. The study confirmed that the movement towards menthol use among the young continued.¹⁸

The trend towards menthol use among the young, coming as it did during a time when health concerns about smoking were rising, was encouraging to those companies with large share-of-market menthol products because they understood that it was these new, young customers who would grow into loyal consumers in the future.¹⁹⁻²¹ Consequently, they poured resources into investigating how and why people chose menthols when they were starting to smoke. Some of the studies found that new smokers chose menthol cigarettes because they were easier to smoke.

For example, an RJ Reynolds memo about a possible new, low-level menthol cigarette validated the common perception that it takes effort to acclimatize oneself to inhaling smoke.

First-time smoker reaction is generally negative: - foreign taste; - harsh/bitter; - adoption requires slow acclimation. Initial negatives can be alleviated with a low level of menthol: - reduces harshness/bitterness; - takes edge off flavor; - previous taste experience; - traditional and maintains integrity.²²

This echoed an earlier analysis of a focus group of young African American smokers conducted for RJ Reynolds in 1972:

There were some exceptions [to the group of people for whom smoking menthol had not been a “deliberate decision”], however, particularly when a respondent felt his previous [non-menthol] brand was too strong. There is a feeling that mentholated cigarettes are more soothing on the throat, less harsh... The mentholated cigarette, whether a brand viewed as quite strong such as Kools or relatively/weak, is almost invariably regarded as milder than other types, easier on the throat.²³

Summarizing opinions from a 1973 focus group study (probably of younger smokers due to references to drug use in the document) conducted for RJ Reynolds, advertising agency William Esty Co. wrote:

Because of its relative mildness, several respondents report that they can smoke a mentholated cigarette the first thing in the morning whereas doing this with a non-mentholated cigarette produces unpleasant results, smoking a mentholated one does not.²⁴

Three years later, they found similar reasons voiced by a group of 18 to 25 year old men and women.

All the smokers come to the menthol category by rejecting the tobacco taste of non-menthols. They find no enjoyment, pleasure, sensation from the tobacco per se, and when they refer to the taste of non-menthols, a taste they have rejected they mean: hot and harsh, dry, chalky. These are the residual sensations of tobacco taste left in the mouth and throat.¹⁷

A 1978 Lorillard study of 18 to 20 year old African American men and women in Charleston, South Carolina again confirmed that young people smoke menthol cigarettes because the taste was preferred.

Initially [a] menthol cigarette tastes better: [they have a] continuing desire for [the] cool, refreshing taste of menthol over [the] harsh, burning taste of non-menthol [and they] prefer menthol taste over a tobacco taste.²⁵

“A Study of Smokers' Habits and Attitudes with Special Emphasis on Low Tar and Menthol Cigarettes” conducted in 1979 for Philip Morris made a distinction between taste and effects in

the choice of a menthol brand. (This study surveyed people aged 18 and over but did not focus on young adults in particular.)

The survey suggests that the appeal of menthol cigarettes is more in terms of their effects than their tastes. Not only is there an absence of significant taste differences between menthol and other smokers, but what menthol smokers report they like and other smokers report they don't like about menthols is largely in terms of effect rather than taste.

The key effects that seem to appeal to menthol smokers are menthol's perceived

- Cooling effects
- Clean, antiseptic effects
- Slightly numbing, anesthetic effects
- Heady, lifting effects

Menthol seems to have some of the properties of a drug, which attract its likers, but repel other smokers.²⁶

In 1981, RJ Reynolds collected data from six groups of 18 to 24 year olds and one group of 25 to 34 year olds and also found that effects or sensations played a role.

The respondents in Moorestown, New Jersey, and St. Louis, whether they were Salem smokers or not, all said they smoked menthol cigarettes because they were cooler and milder, less harsh than regular cigarettes.²⁷

It was not just taste, effect or sensation that propelled youth or young adults to smoke menthol cigarettes, though. The companies found a social basis to explain why young or new smokers used menthol cigarettes - peer or familial influence. Young people under age 18 have a more difficult time purchasing cigarettes and are more likely to share cigarettes obtained from older friends and siblings. If their friends smoke menthols then that is the type of cigarette that is more easily available to them. The tobacco industry has long claimed that it is peer influence, rather than advertising, that induces youth to start smoking. In these studies, however, the peer influence factor is not being compared to advertising. Rather, it is cited as one reason why people smoke menthols. It is interesting to note that in the focus group studies on initiation found for this report, advertising was rarely mentioned as a reason for why youth smoke menthols.

A report from a 1975 Lorillard focus group of African American and white menthol smokers under age 35 summarized how important social factors were in the choice of cigarette type.

Those who have always been menthol smokers usually elected to smoke menthol because someone in their family smoked a menthol brand, or close friends smoked a menthol brand, at the time that they began to smoke.²⁸

The report on the group of African American menthol smokers from Charleston reiterated this, albeit about brand choice.

These young adult Charleston smokers were much the same as the menthol smokers in the other markets as far as the prime influences on them regarding their first brand selection: - What their friends smoke is key. - To be "in", smoke what friends smoke. - Easy accessibility [sic]/"bumming" very common. - What family members smoke provided "free"/easy access.²⁵

Additionally, a 1984 Lorillard study of male and female menthol smokers, three-quarters of whom were under age 25, and in which "blacks were quite heavily represented," found similar results.

In both the male and female portion of the sample, one-half of the respondents smoked a menthol brand as the initial brand they tried because it was the brand that was available in the home or available from friends.

...

Two-thirds of both the male and female respondents reported that they began buying menthol cigarettes when they first began purchasing cigarettes for themselves, and almost always cited peers as the major influence in their selection of menthol cigarettes at the time.¹⁶

While the tobacco companies cited taste or sensation, and peer and familial influences, as the predominant reasons why youth or young adults smoke menthol cigarettes, in the early 1970s, Philip Morris found that certain people smoked them because they believed it enhanced the smoking of marijuana. This may have been a passing phenomenon but it was still being reported, perhaps as an urban legend, in the 1990s.²⁹

This ties in with the information we have from focus group sessions and other sources that suggest that Kool is considered to be good for "after marijuana" to maintain the "high" or for mixing with marijuana, or "instead."³⁰

And,

The Kool study conducted by Burrell McBain indicated that one reason for Kool's growth is the belief that menthol cigarettes are especially compatible with smoking marijuana. This does not mean that all of the new menthol smokers also smoke marijuana. It may have been part of the original reason for the trend to begin, but once begun, the trend feeds on itself as young smokers emulate others and see that it is now acceptable or even the "in thing" to smoke menthol cigarettes.¹²

These comments echoed what the tobacco industry was saying about brand choice among youth – that it was largely peer influenced. Other studies found that young smokers chose menthol because they found it "relaxing"²⁴ or "less harmful" or "moving away from the problem [of smoking a harmful product]."³¹ Brown & Williamson surmised that beginning smokers' familiarity with mint-flavored confections contributed to their acceptance of menthol cigarettes.

Menthol brands have been said to be good starter products because new smokers appear to know that menthol covers up some of the tobacco taste and they already know what menthol tastes like, vis-à-vis candy.³²

Some manufacturers, though, viewed the decision to smoke menthols as a random or unconsidered event. Most of the research found in this study was conducted for tobacco companies in the United States. However, a few documents were from Imperial Tobacco, the largest cigarette company in Canada. While it is beyond the scope of this report to discuss differences between Canadian and United States markets, Imperial was also interested to know why people choose to smoke menthol cigarettes. It reported

The means by which people gravitate toward menthol cigarettes, perhaps more than is the case for other choices in the tobacco market, is to a large extent - haphazard. It is not, that is, a conscious or deliberate choice. Often, trial of a menthol is occasioned by a cold. It is almost axiomatic among the smoking fraternity that the onset of a head cold is the signal to switch to a menthol, at least for temporary relief.³¹

Even RJ Reynolds, maker of Salem, one of the three top-selling menthol brands, said

Interestingly, the choice of a mentholated cigarette is very often not a conscious choice of this particular type of cigarette. That is, among our panel members, the mentholated cigarette appeared to be regarded as one of a number of possible alternatives, mentholated and unmentholated. In most cases, there appeared to be no deliberate decision to smoke a mentholated rather than an unmentholated brand; it was simply one of a number of choices.²³

Even though this evidence suggests that a number of factors contribute to new smokers choosing menthol cigarettes, this phenomenon is actually even more complex than it appears. One cannot view menthol cigarettes as a monolithic category because menthol brands contain a range of menthol amounts and the quantity has a considerable effect on the cigarette's taste and sensation. The tobacco industry knew that people just starting to smoke prefer cigarettes with a hint of menthol, just enough to take the edge off the tobacco taste. As smokers age, they start to prefer cigarettes with more menthol taste. This creates a dilemma for brand managers – keep the menthol level low and risk losing smokers to a higher strength menthol brand or gradually increase the menthol level at the risk of fewer new smokers. This propensity had been identified by Brown & Williamson in 1979³³ and by RJ Reynolds in 1986.³⁴ RJ Reynolds, the manufacturer of Salem, grappled with it in this way.

The analysis also found once a smoker adapts to smoking a menthol product, the desire for menthol increases over time. A brand which has a strategy of maximizing franchise acceptance will invariably increase its menthol level. Thus, once a brand becomes successful, its product will evolve in a manner that is not optimal for younger adult non-menthol smokers/switchers.

Newport, currently offering the most tobacco taste, has been slowly increasing its menthol level over the past several years. Thus, there appears to be a strategic

opportunity for a new low level menthol brand to capitalize on an out-of-sync competitor.¹⁵

While RJ Reynolds thought Lorillard's Newport had too much menthol for beginning smokers, Brown & Williamson believed that its relative lack of menthol taste attracted newer smokers who might otherwise choose KOOL.

This memo addresses the fact that KOOL is no longer attracting new smokers (further referred to as "starters"), a product-related reason which possibly explains this position, and suggestions to correct this problem.

Switching data ... clearly show that KOOL KS and 100 are not attracting their fair share of starters. Newport, on the other hand, is performing above its fair share. Besides the differences in packaging and marketing between KOOL and Newport, one basic product difference exists which can possibly explain part of the reason for KOOL's disparity among starters. Basically, it is that KOOL's menthol level is too high for starters.

The dilemma is that KOOL can't satisfy the needs of both starters and current franchise. Franchise smokers prefer a product providing greater menthol taste than do starters. This paradox isn't easily corrected by just changing KOOL's menthol level, due to the significant risk of losing franchise smokers. Thus, a more logical approach is to:

1. promote KOOL MILDS as the starter brand,
2. line extend the KOOL family with a product having -12-14 mg tar with a lower menthol loading... or
3. introduce a free standing new product having the same product description as in (2) above.³²

Companies kept a close watch on competitors' menthol levels, if not in exact measurement, at least in relative terms. In 1989, RJ Reynolds decided to pursue the new smoker or young adult market by creating a low-menthol extension of the Salem family. Project GLD was devised "To position Salem's product line for younger adult smoker growth by offering a product which better addresses their wants."³⁵

The tobacco industry did indeed find that youth were attracted to menthols; that many smoked them because they provided a more palatable smoking experience – either physiologically or socially. These data do not address whether these inexperienced smokers would work through their discomfort with non-menthol cigarettes if menthol ones were unavailable. But, it does confirm that some young smokers are able to start more easily with menthol.

II. Do menthol smokers start smoking earlier than non-menthol smokers? Is there a higher use among youth who have been smoking for less than one year?

Little evidence was found to show that menthol smokers start earlier than non-menthol smokers. Most smoking begins between the ages of 12 to 24 years; fewer than 5% start smoking after age 25.

The only mention of age of initiation was a 1972 Philip Morris report.

The people in these groups [of blacks, whites, males, females, with high school or less, and college graduate or student status, some groups aged 18-24, and one group aged 25-34] tended to start smoking cigarettes at fairly early ages. Some started as early as age 10 and most were regular smokers by age 15. The starting brand was usually a full-flavored non-menthol, but very quickly they switched to a menthol. Generally the only clear answer to "why the switch" was a reference to the taste, e.g. "smooth, not harsh," "delicious."³⁶

Nothing in the documents addressed the question of which type of cigarette is chosen in people's first year of smoking. The data most related to this issue comes from inquiries about brand/type choice during the past year of smoking. The studies, however, do not distinguish between people who have been smoking less than a year from those who have smoked longer. To further complicate matters, it is not known whether those smoking menthols for less than a year started with menthols or whether they had switched from non-menthols.

A 1974 Philip Morris study of smoking habits among smokers 24 years old and younger focused on the trend toward menthols and how it affected their Marlboro franchise. In it, they compared brand choice rather than type of cigarette.

A potential danger signal for Marlboro appears among those who have adopted their current brand in the past year. Marlboro has its lowest share among this group (22%), while Kool is slightly above its average share (20%). Among those who have adopted their current brand in the past six months, Marlboro (20%) is even weaker in relation to Kool (22%). Virginia Slims, on the other hand, is much stronger than average among those who have adopted their brand in the past year - a healthy sign for this brand. [VS includes both menthol and non-menthol]

...

Marlboro n/m [non-menthol] has a much lower percentage of smokers who have smoked it less than one year than do Kool, Winston and Salem, and is highest in percentage of those who have smoked their brand three years or more. This can be good in that Marlboro is holding its young smokers over time. However, it also demonstrates lower vitality than the others in attracting new smokers.¹⁸

A 1979 Philip Morris study in which they interviewed 1327 smokers over age 18 included an assessment of menthol cigarette usage and attitudes. It is unknown what proportion of young adults were in the menthol smoker sample, but it appeared that there had been a decrease in the proportion of people who'd been smoking menthols for less than a year.

If share among those who have smoked their brand less than one year is a sign of vitality (as we said in the case of low tar brands), then menthols demonstrate less vitality than in 1976. In 1976 almost half (45%) of this group smoked a menthol,

compared with 30% of all smokers. Now 33% of those who have smoked their brand less than one year smoke a menthol--not a much higher share than among all smokers (31%).²⁶

III. Did current smokers start smoking menthol cigarettes before switching to non-menthol cigarettes?

Youth tend to smoke brands to which they have access through family or friends but relatively few people switch from menthol to non-menthol after they become confirmed menthol smokers.

Beginning youth smokers, those who may not have purchased packs on their own, smoke cigarettes that are available to them – those acquired by older friends or family members. While they may prefer a brand or type, they smoke what they can get. It may take some time before a smoker confirms a preference either by refusing to smoke certain brands or types or by buying their own. Once this happens, though, young people switch brands or types more frequently than older smokers.³⁷ Sometimes menthol smokers under age 25 switched to non menthol brands but more often, it seems non-menthol smokers switched to menthol as evidenced below.

Companies are usually more interested in researching about brand loyalty than about type loyalty but these studies provide some evidence about switching. A 1974 Philip Morris report analyzed how sales of Kools to youth affected Marlboro sales.¹⁸

Marlboro n/m [non-menthol] and Kool apparently in the past were trading young smokers back and forth, with Marlboro getting a larger percentage switching to it from Kool than Kool was getting from Marlboro. Among all young smokers, 28% who left Marlboro n/m went to Kool, and 34% who left Kool went to Marlboro n/m. However, among those who switched from Kool in the past year, only 12% went to Marlboro n/m, while 26% who left Marlboro n/m went to Kool.

...

“Since Marlboro and Kool are the predominant brands among young smokers, it is not surprising to find that there is switching from one to the other. Among all more-than-a-year-ago switchers from the two brands, Marlboro was gaining a higher percentage from Kool than Kool was from Marlboro. However, disturbing for Marlboro is that the pattern appears to have changed drastically among those who switched in the past year. Admittedly the sample is very small, but the figures are indicative. Roughly, the same percentage of Marlboro smokers are switching to Kool when they leave Marlboro, but a far smaller percentage who leave Kool are going to Marlboro.

The same study elaborated on the trend, noting a racial aspect to switching.

Marlboro is the starting brand for young whites, and Kool is the starting brand for young blacks. However, Marlboro has only a slightly higher share of white smokers (36%) than started with it (32%), while Kool has almost double the share of both whites and blacks who started with it.

Four years later, a Lorillard study revealed that usually African American young adults started with Kools, occasionally tried Salem as their first cigarette and a few began with “starter brands” such as Pall Mall, Winston and Winchester, that were available in the home.²⁵

A 1984 Philip Morris study, based on a questionnaire filled out by over 26,000 people, noted that there was some movement from menthol to non-menthol but “Larger percentages of smokers who switched to a menthol came from a non-menthol than vice-versa.”³⁷

There is ample evidence, however, that shows that menthol smokers had smoked non-menthols, whether as confirmed purchasers or in the initial stages of trying several brands. There is no way, though, to determine precisely what proportion of menthol smokers started out smoking non-menthols and this figure would have undoubtedly changed over time. Reasons for switching from non-menthols are as varied as reasons for smoking menthol cigarettes, many of which were mentioned earlier. However, having a cold or sore throat seemed to be the predominant reason, as shown by the following excerpts from studies on brand perceptions and attitudes and behavior towards mentholated cigarettes.

These young smokers began smoking the "popular" brands, Winston, Marlboro, Tareyton and Kents, etc., and moved to menthols for a variety of reasons or circumstances; the rejection of tobacco taste, the search for a "milder" cigarette, personal influence, or the *circumstances of having a cold and wanting to continue smoking, but being unable to "handle" the hot taste of cigarettes in an already irritated throat.* [Emphasis added]¹⁷

The choice of a mentholated brand rather than a non-mentholated brand occurred in two ways among our panel members. Often it was based on a deliberate decision to switch to mentholated cigarettes for specific reasons. Generally when a respondent reported that he made a conscious decision to switch to a mentholated brand it was because of some problem, minor or major. For instance, *many switched to mentholated cigarettes because of throat irritation, colds, coughs or chronic bronchitis.* [Emphasis added] Sometimes respondents saw smoking a mentholated brand as the only alternative to giving up smoking altogether... Often, however, there was no conscious decision to switch to mentholated cigarette, simply a desire to switch to another brand because of dissatisfaction with the current brand.²⁴

Menthol smokers, in general, liked the taste, and were more apt to switch to another menthol brand rather than a non-menthol if they were dissatisfied with their smoking experience. A Lorillard report made this point.

Most of the respondents who had changed brands had changed from one menthol brand to another menthol brand. The change was made in favor of a brand perceived to be "lighter" than the prior brand although this by no means meant it represented a switch to a brand with low tar and nicotine.¹⁶

And, 1982 report by Imperial Tobacco also confirmed a similar phenomenon, despite product and market differences in Canada.

Conversion to menthol seems to be circumstantial rather than deliberate: borrowing a friend's menthol, trying a package during a cold and staying with it afterwards. Rarely do people make a specific a priori decision to switch to a menthol cigarette. Once having made the commitment, however, it seems to be an unusually strong one. *Even when they try, as they sometimes do, they typically are not able to revert to a non-menthol brand.* [Emphasis added.]

* It is the cooling effect which constitutes the major attraction, this and the concomitant reduction in both harshness and tobacco taste.

* The actual menthol flavour, while pleasant, is not itself a significant reward.³¹

IV. Does menthol accelerate progression toward established smoking?

There was no evidence found that indicated that people who start smoking menthols, rather than non-menthols, move more quickly toward becoming regular daily smokers. However, ample evidence shows that the industry collected demographic data (age, gender and race) on beginning menthol smokers because it fully expected young menthol smokers to remain tobacco consumers.

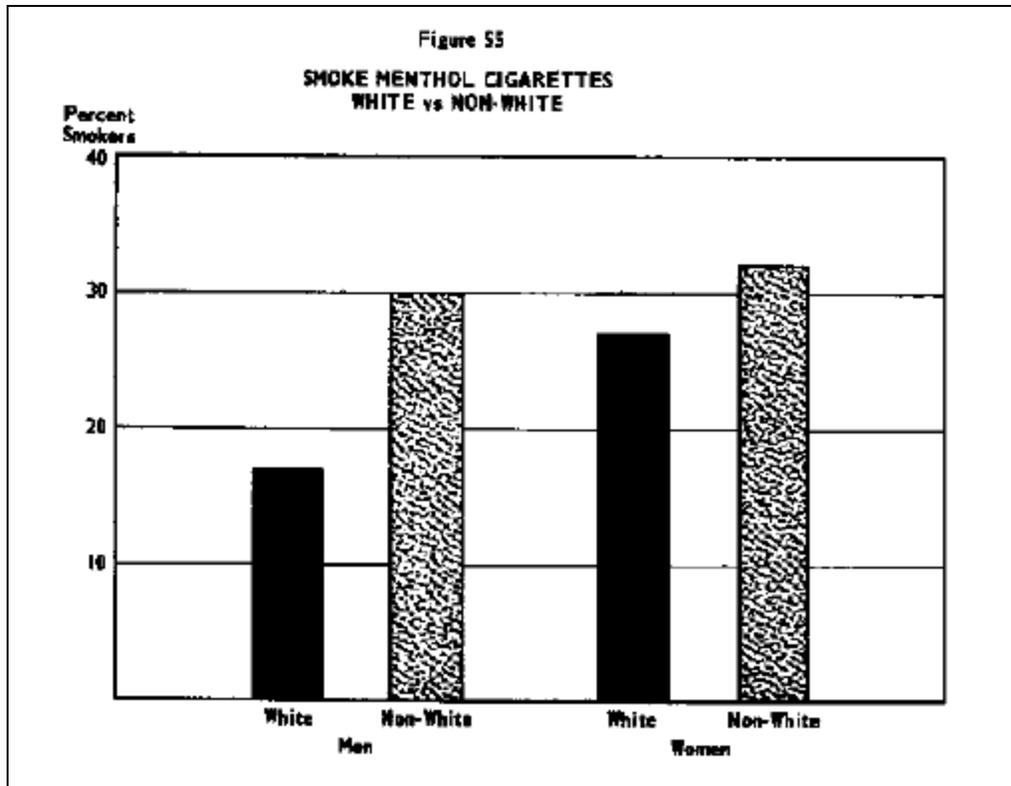
Since many novice smokers find it easier to smoke low-level menthols, tobacco companies with such products have a ready-made customer base. As RJ Reynolds stated in 1985:

The renewal of the market stems almost entirely from 18-year-old smokers. No more than 5% of smokers start after age 24. The brand loyalty of 18-year-old smokers far outweighs any tendency to switch with age.³⁸

The companies with a strong menthol entry wanted to attract inexperienced smokers to the menthol market or they wanted to create a low-level menthol product that they hoped would appeal to young smokers. In order to tailor marketing campaigns to capitalize on emerging market trends, they tracked and analyzed smoking behavior by age, sex and race. Starting in the late 1960s, companies started to see racial differences among smokers. A 1969 report prepared by Eastman Chemical Products for American Tobacco Company reported³⁹

Approximately 28% of all women smokers and 19% of all men smokers claimed menthol brands as their regular brand. Of the total number of menthol smokers, 54% were women and 46% men.

As shown in Figure 55, menthol cigarettes were preferred by a higher percentage of the nonwhite smokers than of the whites, especially among men. Although non-whites are only 11% of our total population, 22% of the menthol cigarette smokers were non-white.



This phenomenon was observed again among young smokers by Philip Morris in 1974.¹⁸

Philip Morris has evidence that there has been a rapid trend to menthols--and to Kools in particular—among young smokers.

...

Perhaps the most important conclusion to be drawn from this study is that any discussion of the young cigarette market in total is almost meaningless, for whites differ so greatly from blacks in their smoking habits--and in their images of brands. For example, Marlboro n/m [non-menthol] is the dominant brand among young white smokers, with a 36% share of smokers. Kool is second at 14%. This bears no resemblance to the young black market. Here Kool owns it, with 59% smoking it most often, Salem second at 12% and Marlboro n/m a very low third at 6%.

...

The vast majority of young blacks smoke a menthol brand (80%). Menthols are also quite strong among young whites at this point, with 33% smoking a menthol. The young market not only differs by race, but by sex. Among young whites, menthols are much stronger among women (39%) than among men (27%).

...

Among young blacks, menthols dominate among both sexes, but a little more strongly among women (83%) than among men (77%).

...

Menthol Cigarettes and the Initiation of Smoking: A White Paper

	<u>Total</u>	<u>White</u>			<u>Black</u>		
		<u>Total</u>	<u>Men</u>	<u>Women</u>	<u>Total</u>	<u>Men</u>	<u>Women</u>
		%	%	%	%	%	%
Smoke a non-menthol brand	<u>61</u>	<u>66</u>	<u>72</u>	<u>60</u>	<u>19</u>	<u>22</u>	<u>16</u>
Smoke a menthol brand	<u>39</u>	<u>33</u>	<u>27</u>	<u>39</u>	<u>80</u>	<u>77</u>	<u>83</u>

Both Marlboro (among whites) and Kool (among both blacks and whites) have their largest share among very young smokers (18 and younger)—suggesting the propensity toward conformity in this age group gives both brands a boost in that group.

...

	<u>White</u>			<u>Black</u>		
	<u>18</u>	<u>19</u>	<u>22</u>	<u>18</u>	<u>19</u>	<u>22</u>
	<u>and</u>	<u>to</u>	<u>to</u>	<u>and</u>	<u>to</u>	<u>to</u>
	<u>less</u>	<u>21</u>	<u>24</u>	<u>less</u>	<u>21</u>	<u>24</u>
	%	%	%	%	%	%
Smoke a non-menthol	<u>63</u>	<u>69</u>	<u>67</u>	<u>7</u>	<u>17</u>	<u>31</u>
Smoke a menthol	<u>36</u>	<u>31</u>	<u>32</u>	<u>93</u>	<u>83</u>	<u>66</u>

Lorillard grappled with the observation that, although African Americans smoked menthols to a much larger extent than whites, the latter group comprised a bigger potential consumer base. They operated under the assumption that African American and white smokers made smoking decisions differently when they devised a methodology for studying consumer acceptance of two new menthol products, “a Kool prototype marketed under the name Baron” and “a “cooler than Kool” product called Blue Ice.”⁴⁰

A product would be considered acceptable for test market introduction if upon examination of overall and characteristic ratings it achieves parity ratings with Kool with no outstanding negatives. Furthermore, although the products would be skewed black, it is unlikely that Lorillard would proceed with a product that wins among blacks and loses among whites.

...

Manipulation of the sample size will provide sufficient bases to allow for analysis of both the test formulas and Kool separately by race.

...

Examination of previously conducted research has demonstrated differences in the attitudes of black and white consumers with respect to the menthol cigarette market (see Menthol Product/Concept Study #110025). Consequently, the sample for this research will be divided among blacks and whites. Further breakdown within race will be by sex, half male-half female.

Lorillard, in an evaluation of Newport cigarettes, found that they were running third behind Kools and Salem in the African American market. But, they also found positive marketing news – that Newport was strong among very young smokers.⁴¹

Strength and growth limited to northeast and north central regions -- skews urban, but not black. Franchise very young and heavily female. Young franchise very concerned about alleged effects of smoking on health, - tend to enjoy smoking less.

<u>NEWPORT CIGARETTES</u>			
<u>SHARE OF SMOKERS</u>			
<u>14-17 YEARS OLD</u>			
	<u>10/73</u>	<u>10/74</u>	<u>10/75</u>
TOTAL	3.7 (100)	3.9 (100)	4.5 (100)
MEN	3.1 (84)	3.5 (90)	3.7 (82)
WOMEN	4.2 (114)	4.4 (113)	5.4 (120)
SOURCE: NFO			

Newport's SOM [share of market] among smokers 14-17 years old is significantly higher than brand's Total SOM, reflecting strong appeal to young/new smokers. Brand is particularly strong with female smokers in this age group (5.4 SOM).

...

Kool and Salem remain the best selling menthols in the Black market.

...

The MRD Black monitor indicates the black Newport Smoker is somewhat younger than the black Kool Smoker and, as expected, much younger than the Black Salem smoker. The Black Newport smoker skews slightly more female than the black Salem smoker and much more female than the black Kool smoker.

By 1977, RJ Reynolds reported that 34% of African American menthol smokers were between 18 and 24 years old.⁴² The increasing popularity of menthols among the young, women and African Americans worried Philip Morris, which did not have a strong menthol product.⁴³

We knew that Blacks, females, and younger smokers were more likely to smoke menthol cigarettes than whites, males, and older smokers. Table 1 shows the magnitude of these differences.

TABLE 1
PERCENT OF PANELISTS WHO SMOKE A MENTHOL BRAND

<u>Age</u>	<u>White</u>		<u>Black</u>	
	<u>Males</u>	<u>Females</u>	<u>Males</u>	<u>Females</u>
18-24	40.5	47.0	93.2	90.4
25-34	24.7	32.0	76.1	74.3
35-44	21.6	30.6	40.9	55.1
45-54	20.6	25.8	37.1	47.5
55+	18.4	22.9	42.5	39.8

These differences could have a profound effect on the future growth of the menthol share of the market. We know, for example, that males, whites, and older smokers are more likely to quit smoking than females, Blacks, and younger smokers. We know too that Blacks constitute an increasing proportion of the prime smoking age (18-62) population - 10.2% in 1970, 10.8 in 1977, and 11.5% in 1984. Their increasing importance in that critical 18-24 age-group is even more dramatic - from 11.4% in 1970 to 12.7% in 1977 and 13.7% in 1984.

The net result of these trends is that the smoking population is becoming younger and increasingly Black and female. Therefore, based purely on the demographics, we can expect menthol to continue to increase its share of market. At present Blacks constitute only nine percent of all smokers, but they account for 19 percent of menthol smokers. Whites (and other non-Blacks) aged 18 to 24 constitute only about 17 percent of all smokers, but over 25 percent of menthol smokers.

It will require close monitoring of our panel to determine if these young menthol smokers retain their preference for menthol as they grow older or if they subsequently switch to a non-menthol brand.

Philip Morris kept close tabs on the menthol market and reported a year later, in 1979:²⁶

Menthols are still stronger than average among women, young smokers, blacks and light smokers. But they have lost share dramatically among very young smokers since 1976, and slightly among blacks--though they still dominate in the black market. They still show growth among women.

...

Most of the menthol brands do better among women than men. Kool is the major exception. Menthol brands also tend to do better than average among young smokers, but B&H 100's menthols are an exception. They do less well among the very young smokers. Most menthol brands have a much higher than average share among blacks.

RJ Reynolds, in one of their iconic "young adults as replacement smokers" reports in 1984, continued tracking their competition in the menthol segment:³⁸

In the 1980's, Newport started rolling out across the South Atlantic, where migration patterns of the 1970's showed Blacks had been returning. Tracker data during this rollout period tend to confirm that Newport gained among younger adult Whites as it gained distribution, but its fundamental growth has been due to younger adult Blacks.

...

NEWPORT MENTHOL SHARE OF SMOKERS					
			1st Half	2nd Half	1st Half
	<u>1980</u>	<u>1981</u>	<u>1982</u>	<u>1982</u>	<u>1983</u>
<u>AGES 18-24</u>					
Black	18.6%	22.4%	25.2%	28.9%	36.6%
White	4.4	4.9	5.5	5.0	4.9
TOTAL	6.1	7.0	7.5	7.6	8.5

Since the Kool phenomenon began in the 1960's, younger adult Blacks have moved increasingly to menthol products, which have accounted for 90% of the younger adult Black market in recent years. In 1983, 72% of Blacks 18-24 smoked one of the 3 major Coolness brands, although the segment has been getting some competition from Stylish brands. Virile brands, even Marlboro, have virtually no appeal to Blacks.

In another report that year, they continued parsing the menthol market by race with these statistics.⁴⁴

Blacks' menthol preference is most pronounced among females (71%), younger adults (89%), and established adults (83%).

...

Lorillard has become the leading company among 18-24 year old Black smokers because Newport's share has doubled within the last three years, while Kool's share has declined by one-third.

And again with another analysis:⁴⁵

Similar to Marlboro, Newport's share was strongest among 18-20 year olds. The brand skewed slightly female and was, most firmly entrenched among Black smokers, reflecting the strong appeal menthol has to Blacks.

...

RJR may also benefit from bolstering its position among younger adult Blacks, who represent 1.9% of total smokers and 11.6% of 18-24 smokers. This group--again with emphasis on the 18-20 year olds--has contributed to Newport's outstanding development but has not been as effectively tapped by SALEM. This may suggest potential for a new brand that would appeal to younger adult Blacks' overwhelming preference for menthol.

RJ Reynolds continued tracking smoking behavior among 18 to 20 year olds. In 1985, they reported:⁴⁶

Consistent with the Blacks preference for stronger tasting products relative to the White market, the Black market skews heavily menthol. The menthol market has a 91% share among Blacks versus a 23% share among Whites. Additionally, menthol is somewhat higher developed among females than males; 38% versus 24%.

TOTAL SMOKERS 18-20					
	Total (%)	White (%)	Black (%)	Male (%)	Female (%)
Non-Menthol	69.4	77.2	8.9	76.1	62.4
Menthol	30.6	22.8	91.1	23.9	37.6

...

[Among Blacks] The menthol styles have virtually saturated the female market with a 95% share. The males, although to a lesser extent, also have a high menthol development of 88%.

RJ Reynolds was very aware that without a product appealing to younger adult African American smokers, they would never succeed in the menthol market.⁴⁷

New Brand efforts should focus on developing Virile Segment and Coolness Segment brand entries given that Marlboro and Newport are market leaders among younger adult smokers. Recognizing that Newport's growth is largely being fueled by younger adult Black smokers, RJR could also benefit by bolstering its position among these smokers.

V. Did the tobacco industry market menthols to the youth market and what images did they use?

Yes, menthol is an important design feature which is known by the industry to be attractive to beginning smokers (mainly teens). Marketing imagery for menthol brands was geared to reflect themes relevant to a young target audience.

Companies with menthol brands decided to market their entries to young people once they saw that this type of cigarette appealed to youth. These campaigns were based on the assumption that peer influence largely drove youth smoking choices. This was articulated by RJ Reynolds in a report titled, "New Brands Research. Younger Adult Smokers in the '80s."⁴⁸

Younger adult primary motivation for brand choice in all product categories is the type of people they see/perceive using the brand.

In 1972, Lorillard debuted its “Alive with Pleasure” campaign for their Newport brand which relied heavily on images of young people (see Figures 1 and 2). Their advertising expenditures increased dramatically as sales grew.⁴¹

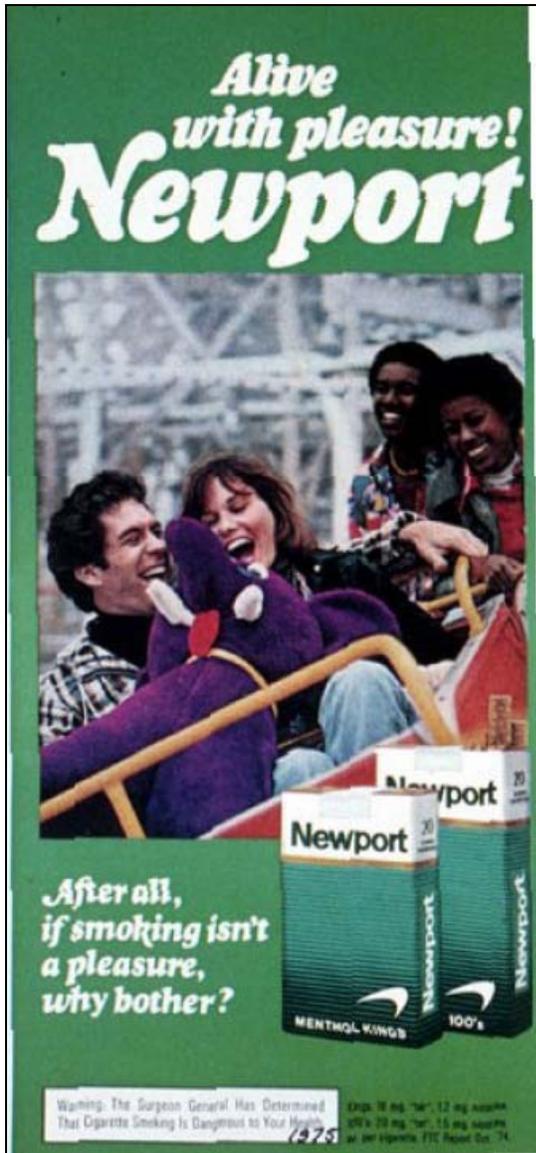


Figure 1: Newport Advertisement, 1975
<http://legacy.library.ucsf.edu/tid/utc04b00>

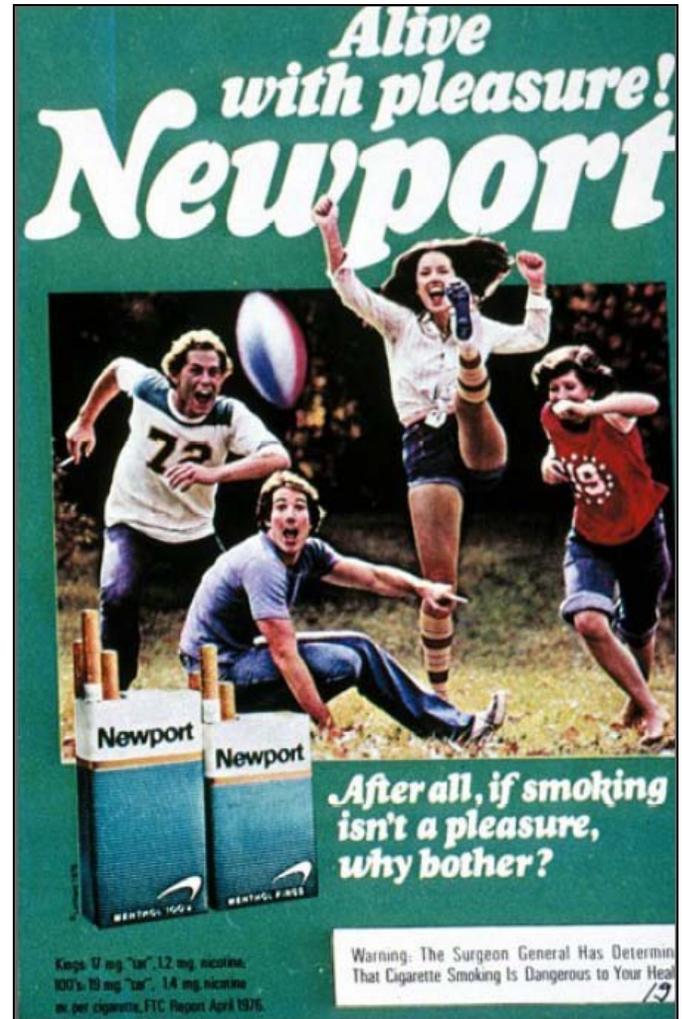


Figure 2: Newport Advertisement, 1976
<http://legacy.library.ucsf.edu/tid/osc04b00>

There was a self-reinforcing success loop that could be achieved with this approach: market to youth with youth-oriented images causes sales to young adults to increase which gives rise to the perception that the brand is popular which attracts more youth smokers and encourages a company to expand marketing efforts towards youth.

By 1976, RJ Reynolds saw that Lorillard’s strategy was working and that it might negatively impact sales of Salem, which was the second best selling menthol brand behind Kools. They monitored the situation carefully.

Newport's growing acceptance in this area [among 18 to 25 year olds] is reflected in the positive response to it as a product, to its package and especially to its advertising.¹⁷

They described the attributes of Lorillard's Newport marketing strategy:

Newport [is] placing increased emphasis on both young female and young male publications reducing older female publications [magazines]. Trend is toward younger readers and more men although overall female skew continues.

Newport's promotional plan tends to be directed to its young smokers -- youth oriented premiums, inducing pack purchases.

The brand's advertising talks directly to young people -- situations, attitude.⁴¹

It took RJ Reynolds until 1982, however, to adopt Lorillard's strategy and position Salem as a brand appealing to younger smokers (see Figure 3).

Salem's prime prospects became more focused being defined as younger adult smokers with 25-34 females included in the total prospect group."

<u>% emphasis</u>	<u>description</u>
80%	18-24 year olds
20%	25-34 year old females

...

Salem's targeting to younger adult smokers addresses the smoker segment with the highest potential for future growth. Coolness segment [menthol] smokers are the youngest of any segment.⁴⁹

And

Continue positioning and advertising emphasis on younger adult smokers reinforcing Salem's product and user imagery to younger adult smokers by:

- focusing positioning and advertising on younger adult smokers,
- improving appeal of "spirit" campaign with enhanced communication of relevant consumer wants,
- utilizing widespread, high visibility market presence through ooh [out of home] and pos [point of sale].⁵⁰



Figure 3: Salem Advertisement, 1984
<http://legacy.library.ucsf.edu/tid/ace04b00>

RJ Reynolds sought to address this dynamic although they had problems capitalizing on it. Perhaps this was because Salem's level of menthol was too strong for beginning smokers.⁴⁹

Brands which appeal to younger adult smokers (such as Newport and now Salem) will best be able to capitalize on the importance of younger adults as the major growth segment throughout the 1980's.

The coolness segment represents a substantial growth opportunity and will remain the second largest segment. This segment represents a key strategic priority for Reynolds given Salem's leadership position and the growth opportunity represented by GS [proposed low-tar menthol product with a "unique smoking sensation"]. Younger adult smokers (secondarily 25-34 females) represent the key demographic group for growth potential.

The tobacco industry was acutely aware that brand image was particularly important to young adults. For example, Lorillard surveyed menthol smokers mostly under age 24 and found:

Of the three brands, the Newport image appears to be far more malleable and promising in terms of its appeal to younger menthol smokers such as those who participated in this study. Newport is generally associated with younger smokers, with both men and women, and with both blacks and whites by the respondents who participated in this study.¹⁶

RJ Reynolds' strategic review of the youth market in 1984 showed that

Newport, like Marlboro, relies heavily on its users to provide brand imagery among younger adult smokers (See Appendix F). And, Newport has the youngest franchise of any brand in the market — 53% were 18-24 in 1983. Thus, it is no surprise that Newport has become the alternate younger adult identity brand, for those who don't want to just follow the crowd. For Blacks, it's today's alternative to Kool; for Whites, it's an alternative to Marlboro.³⁸

In 1985, RJ Reynolds was still refining its approach. They assessed the appeal of its Salem brand and hypothesized that its advertising message of “coolness/refreshment” might not be relevant to young adults. They asked, “What can menthol sell?” As they knew from their focus group research, “Menthol cigarettes are not "real", not manly but could sell "easier to take" to younger adults.”⁵¹

Up until the 1990s, Lorillard continued selling Newport to younger smokers using image-based marketing.⁵²

- Newport is the brand of choice among younger adult menthol smokers, specifically in urban centers.
- Newport's success can be attributed to its "peer acceptance" among these smokers.
- ...
- We know that Newport smokers perceive other Newport smokers as they do themselves - younger, outgoing, active, happy, warm, friendly, modern, extroverted.
- ...
- Newport's image perception in the marketplace can be defined as squeaky clean, all American, fun, pleasurable.

- When consumers are asked to play back specific Newport ads, oftentimes one or two come to mind, but what is usually played back are amorphous images - couples or groups having a good time, fun, smiling.

While Lorillard knew that its successful marketing campaigns were attracting a larger proportion of young African American smokers than young white smokers, they claimed that race was not a factor in their efforts.²⁵

Newport should be positioned in the same way to both young-Black-adult smokers and to Caucasians -- Their needs, feeling, brand perceptions are similar regardless of race.

However, Brown & Williamson, in an evaluation of their Kool brand indicated that Lorillard, as well as Philip Morris, marketed to the African American community.⁵³

Newport, Benson & Hedges, and More have all targeted user and secondarily product imagery directly at the young KOOL smoker and the Black smoker with successful results in the marketplace. Use of Black media among these competitors has been extensive with well designed creative that exploits status, prestige, and physical attractiveness motivation. More has also been aggressive in promotion activity both in the general and Black market.

RJ Reynolds thought that young African American smokers warranted specific marketing efforts. (See Figures 4 and 5.)

Younger adult smokers are key to RJR's growth in the Black market and warrant marketing emphasis.⁵⁴

Younger adult Black smokers appear to be highly responsive to effective advertising spending. They appear somewhat more likely to be attracted to a brand which keys on their interests in "moving up" and style/dress and can achieve reasonable development in the younger adult general market.³⁸

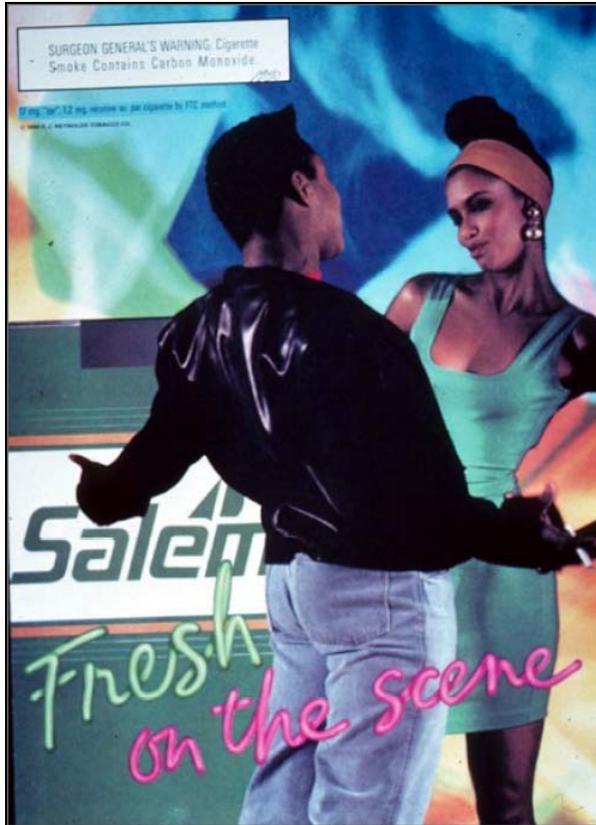


Figure 4: Salem Advertisement, 1990
<http://legacy.library.ucsf.edu/tid/qce04b00>

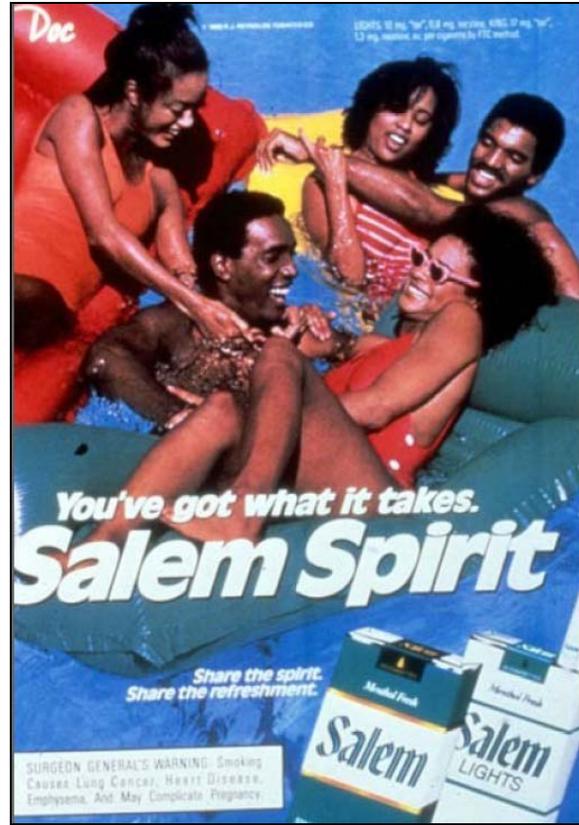


Figure 5: Salem Advertisement, 1985
<http://legacy.library.ucsf.edu/tid/nhe04b00>

Through the late 1980s, RJ Reynolds continued to market to African Americans and other targeted groups.

RJR is developing targeted marketing programs to supplement gm program. These programs will cover more than 70% of total YAS.

<u>Program</u>	<u>% of YAS Covered</u>
Hispanic	10%
Black	15
Military	10
Anglo interests	75

VI “To what extent do non-menthol smokers use menthol cigarettes?”

Non-menthol smokers will use menthol when they are sick because of the perceived lower harshness of the smoke or when they run out of their own brand and buy cigarettes from menthol smokers.

As research was conducted for this report, it became apparent that the category of “non-menthol smoker” was somewhat porous. Non-menthol smokers smoke menthols from time to time even though they remain “non-menthol smokers” in their own eyes. The tobacco industry tried to estimate the scale of this behavior. In 1978 Brown & Williamson reported⁵⁵

1. Occasional users of menthol account for one-sixth (16%) of all menthol users.
2. Occasional users account for 8% of the menthol cigarette volume.

A year later, Philip Morris gathered data showing much higher use of menthol cigarettes by “non-menthol smokers.”²⁶

About three in ten non-menthol smokers sometimes smoke them--10% "fairly often" or "occasionally," 19% "seldom." Three major reasons were given for occasional menthol smoking: Running out of cigarettes and borrowing from a menthol smoker (40%), smoking them when they have a cold or sore throat (34%) and just for a change (26%).

By 1988, RJ Reynolds found considerably less behavior of this sort.⁵⁶

The level of occasional menthol usage among non-menthol smokers is relatively small. Although an average of 4.7% of non-menthol smokers each month are smoking menthol, they account for only .8% of volume. The majority of these smokers (58%) dedicate less than 10% of their total volume to menthol.

Variations in reporting underscore the difficulty in comparing studies done by different companies over a long period of time. But with estimates ranging from 4.7% of smokers per month to between 16 and 29 percent over the year, there are definitely some non-menthol smokers who are actually menthol and non-menthol smokers. These people may be counted as non-menthol smokers in data collected either by the tobacco industry or public health organizations. If this is the case then the number of menthol smokers will be underreported.

DISCUSSION

Some youth start smoking menthol cigarettes when they begin tobacco use or within the first few years of smoking. They do this for a variety of reasons, but according to publicly available internal tobacco industry documents, the main ones are 1) the relative ease of smoking a menthol cigarette for the uninitiated smoker; and 2) its availability from friends and family. Secondarily, some youth smoke menthols because they perceive them to be less harmful than non-menthol cigarettes. The tobacco industry has encouraged this idea through advertising (see the White Paper on Marketing and Consumer Perception for further documentation). This perception may be fueled by the fact that some youth use menthols for the first time when they have a sore throat or cold because they are felt to be less irritating than non-menthols.

There is much switching of brands and types of cigarettes in the youth and young adult market, both from menthol to non-menthol and vice versa. Based on the documents found for this study,

though, once smokers have chosen to be menthol smokers, there is very little switching to a non-menthol brand. Rather, the longer someone smokes menthols, the more they desire a stronger menthol taste and they will tend to switch to a menthol brand with a higher concentration of menthol in the tobacco. The tobacco industry understands this and specifically keeps some brands at a lower menthol-tobacco ratio in order to attract more novice smokers, even at the cost of losing them as they age.

The tobacco industry tracked race and sex in their analyses of the youth and young adult market. They knew that young African American smokers smoke menthols at higher rates than other ethnic/racial groups, and that young women, regardless of race, smoke menthols more than young men. The tobacco industry, eager to attract young smokers, designed marketing campaigns that they hoped would appeal to these segments.

There is no evidence that people who smoke menthols start smoking earlier than those smoking non-menthols. It was also not possible to find documents that spoke directly to the question of whether people in their first year of smoking are more likely to smoke menthols. There is no evidence that menthol cigarette smoking by novices accelerates the progression to established smoking. However, all evidence indicates that the tobacco industry expected menthol smokers to remain smokers.

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APPENDIX

Appendix: Initiation Search Terms and Results from Legacy Tobacco Documents Library.

INITIATION SEARCH TERMS AND RESULTS FROM LEGACY TOBACCO DOCUMENTS LIBRARY			
Search terms	# of results	# of docs screened	# of docs retrieved
“Starter product” AND (menthol* NOT non-menthol*)	213	100	3
“Initiation” AND (menthol* NOT non-menthol*)	10,554	100	0
“Kool family utopian objectives”	29	29	1
Youth “Negro market” (menthol* NOT non-menthol*)	92	92	2
“Smoking Behavior” (young OR youth) (menthol NOT non-menthol) (initiation OR start*)	4,027	25	5
“Smoking habits” (young OR youth) (start* OR initiation) (menthol* NOT non-menthol*)	5,945	100	3
Udow “start smoking” menthol*	128	128	2
Menthol effect* sensory benefits smoothness (youth OR YAS OR “new smoker” OR “start* smoker”)	284	200	3
“Motives and incentives in smoking” Dunn menthol*	19	19	0
“Myron E. Johnson” menthol	101	101	3
“Soothing effect” menthol* (starter OR beginning OR initiation)	201	100	4
“Project Fresh Start”	26	26	3
“New smokers” menthol*	10,787	100	6
(Candy OR “candy-flavored”) menthol NOT “Non-menthol” NOT org: candy NOT per:candy	8,885	200	7
Irritation AND menthol*	30,607	50	5
Marijuana AND menthol*	3,431	150	11
“Ease the initiation” AND menthol*	52	52	2
“Psychographic analyses” OR “psychographic analysis” AND menthol*	33	33	1
(“Hispanic youth” OR “Latino youth”) AND (MENTHOL* NON-MENTHOL*)	170	80	0
(“Younger adult” OR “young adult”) AND menthol*	106,076	100	13
Impact “sensory effects” initiation menthol*	462	100	8
“Smoking onset” menthol*	510	100	0
(“Beginner smoker” OR “beginning smoker”) menthol*	356	25	6
“Tastes like candy” menthol	9	9	1
“Mask harshness” menthol	26	26	3
Kool OR Newport OR Salem “user imagery” NOT dt:proposal	9,857	100	4
((Learner OR pre-smoker) NOT per:learner) menthol*	389	389	0
(Youth OR “younger adult” OR 18) image advertising (Newport OR Kool OR Salem)	59,554	100	6
TOTALS:	252,823	2,634	102