



Special Eurobarometer 506

Summary

Attitudes of Europeans towards tobacco and electronic cigarettes

Fieldwork
August-September 2020
Publication
February 2021

Survey requested by the European Commission,
Directorate-General for Health and Food Safety
and co-ordinated by the Directorate-General for Communication

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The interpretations and opinions contained in it are solely those of the authors.

Special Eurobarometer 506 – Wave EB93.2 – Kantar

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Survey conducted by Kantar on behalf of Kantar Belgium at the request of the European Commission,
Directorate-General for Health and Food safety (DG SANTE)

Survey co-ordinated by the European Commission, Directorate-General for Communication
(DG COMM "Media monitoring and Eurobarometer" Unit)

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INTRODUCTION

Tobacco consumption remains the largest avoidable health risk in the European Union, and is responsible for 700,000 deaths each year¹. Around 50% of smokers die prematurely, resulting in the loss of an average of 14 years of life per smoker². Tobacco consumption is the leading cause of preventable cancer, with 27% of all cancers attributed to tobacco use³. In addition, smokers are also more likely to suffer a range of illnesses because of their tobacco use, including cardiovascular and respiratory diseases.

The European Union and its Member States have been working to reduce the use of tobacco and related products through a range of measures, including regulating tobacco and related products, restricting the advertising and sponsorship of tobacco and related products, implementing smoke-free environments and running anti-smoking campaigns. Some of the last initiatives include the revised Tobacco Products Directive, which became applicable in the Member States on 20 May 2016. The Directive mandates a range of measures including prominent pictorial health warnings on packets of cigarettes and roll-your-own tobacco, a ban on cigarettes and roll-your-own tobacco with characterising flavours as well as certain safety and quality requirements, packaging and labelling rules for e-cigarettes.

The aim of the Tobacco Products Directive is to facilitate the functioning of the internal market while protecting public health and, in particular, to protect the public with a focus on young people from the harmful effects of tobacco consumption, as well as assisting smokers to give up, and discouraging people, especially the young people, from taking up tobacco use in the first place.

The European Commission regularly carries out public opinion polls to monitor Europeans' attitudes to a range of tobacco-related issues. This survey is the most recent in a series that has been carried out since 2003, with the last survey in 2017. The general aim of these surveys is to assess the prevalence of tobacco use and exposure to tobacco smoke in public places, to explore the motivations for smoking, and to help identify measures to reduce the number of smokers in the EU. In addition to these general themes, the current survey also explores the use, the exposure to and the advertising of electronic cigarettes (e-cigarettes) and heated tobacco products. In particular, the current survey explores:

- Prevalence in the EU – of tobacco, e-cigarettes and heated tobacco products;
- The type of tobacco products consumed;
- Use of products containing cannabis;
- The age Europeans start using tobacco as well as the frequency of use;
- Issues related to starting smoking and methods tried to stop smoking;
- Issues related to taking up the use of e-cigarettes and heated tobacco products and methods tried to stop using them;
- Factors that influence the choice of cigarettes, e-cigarettes or heated tobacco products;
- Exposure to tobacco smoke, e-cigarettes or heated tobacco products in public spaces;
- Perceptions of harm from e-cigarettes and heated tobacco products;
- Exposure to advertising for smoking tobacco products, e-cigarettes and heated tobacco products;
- Attitudes to tobacco, e-cigarette and heated tobacco products control policies.

¹ Including the UK

² https://ec.europa.eu/health/tobacco/overview_en

³ World Health Organization, Regional Office for Europe, 18.02.2020 at <https://www.euro.who.int/en/health-topics/disease-prevention/tobacco/news/news/2020/2/tobacco-use-causes-almost-one-third-of-cancer-deaths-in-the-who-european-region>.

Whenever possible, the results from the present survey are compared with those from previous surveys, and in particular with the most recent survey from 2017.

Methodology used for this survey

Exceptionally, this Special Eurobarometer survey 93.2 was conducted during summer (August-September 2020) because of the coronavirus pandemic and in some countries, **alternative interview modes** to face-to-face were necessary as a result of the situation.

When possible, the methodology used was that of the Special Eurobarometer surveys carried out by the Directorate-General for Communication (“Media monitoring and Eurobarometer” Unit)⁴. However, because of the coronavirus pandemic, it was difficult, and sometimes impossible to conduct face-to-face interviews in a number of countries of the European Union. In these countries, we have interviewed respondents online, mostly after recruiting them in a probabilistic way by telephone. A technical note concerning the interviews conducted by the member institutes of the Kantar network is annexed to this report. It also specifies the confidence intervals⁵.

Following the EU General Data Protection Regulation⁶ (GDPR), respondents were asked whether or not they would agree to be asked questions on issues that could be considered “sensitive”.

Although, following the Withdrawal Agreement, the United Kingdom left the European Union on 31 January 2020 and is no longer a Member State of the EU, this report analyses the results of the survey in the United Kingdom together with those in the 27 EU Member States. This is done in order to fully compare the results of the average of the previous survey conducted in 2017 when the United Kingdom was part of the EU and applied the provisions of the Tobacco Products Directive between the last and the current survey. For the sake of convenience and for ease of reading, the weighted average of the results in the EU Member States plus the United Kingdom will be referred to as the EU results. The data for the 27 EU Member States (without the United Kingdom) will constitute the baseline against which the results of future Eurobarometer surveys on this topic will be compared.

Note: In this report, countries are referred to by their official abbreviation. The abbreviations used in this report correspond to:

Belgium	BE	Latvia	LV
Czechia	CZ	Luxembourg	LU
Bulgaria	BG	Hungary	HU
Denmark	DK	Malta	MT
Germany	DE	The Netherlands	NL
Estonia	EE	Austria	AT
Greece	EL	Poland	PL
Spain	ES	Portugal	PT
France	FR	Romania	RO
Croatia	HR	Slovenia	SI
Ireland	IE	Slovakia	SK
Italy	IT	Finland	FI
Republic of Cyprus	CY *	Sweden	SE
Lithuania	LT	United Kingdom	UK
European Union – weighted average for the 27 Member States, plus the United Kingdom			EU27+UK

* Cyprus as a whole is one of the 27 European Union Member States. However, the ‘acquis communautaire’ has been suspended in the part of the country which is not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews carried out in the part of the country controlled by the government of the Republic of Cyprus are included in the ‘CY’ category and in the EU27 average.

⁴ <https://ec.europa.eu/commfrontoffice/publicopinion/index.cfm>

⁵ The results tables are annexed. It should be noted that the total of the percentages indicated in the tables in this report may exceed 100% when the respondent was able to choose several answers to the same question.

⁶ 2016/679

When analysing the results of the present Eurobarometer survey, the following terms will be employed:

- Smoking (or traditional) tobacco products: these include cigarettes, cigars, cigarillos, or pipes;



- E-cigarettes, or similar electronic devices (e.g. e-shisha, e-pipe): these are electronic devices that use e-liquids which usually contain nicotine and produce vapour



- Heated tobacco products: there are e.g. sticks or capsules containing tobacco which are heated by devices.



- (Traditional) smokers: respondents who say they currently smoke cigarettes, cigars, cigarillos or a pipe; unless stated otherwise the terms smoking/smokers in this report refer to smoking of traditional tobacco products listed above;⁷
- Cigarette smokers: respondents who indicate they have at least tried once or twice boxed cigarettes and/or hand-rolled cigarettes;
- (Traditional) ex-smokers: respondents who say they used to smoke cigarettes, cigars, cigarillos or a pipe, but they have stopped;
- Non-smokers or never-smokers: respondents who say they have never smoked cigarettes, cigars, cigarillos or a pipe;
- (Current) users: respondents who say they currently use a certain type of products;
- Daily users: users who say they use or consume a certain type of products on a daily basis.
- Occasional users: users who say they use or consume a certain type of products regularly but not on a daily basis (respondents mentioning a frequency of usage at from every week to less than monthly least monthly)

⁷ Without prejudice to Article 19(4) of Directive 2014/40/EU stipulating that novel tobacco products may fall under the definition of a smokeless tobacco product or of a tobacco product for smoking.

*We wish to thank the people throughout the European Union
who have given their time to take part in this survey.
Without their active participation, this study would not have been possible.*

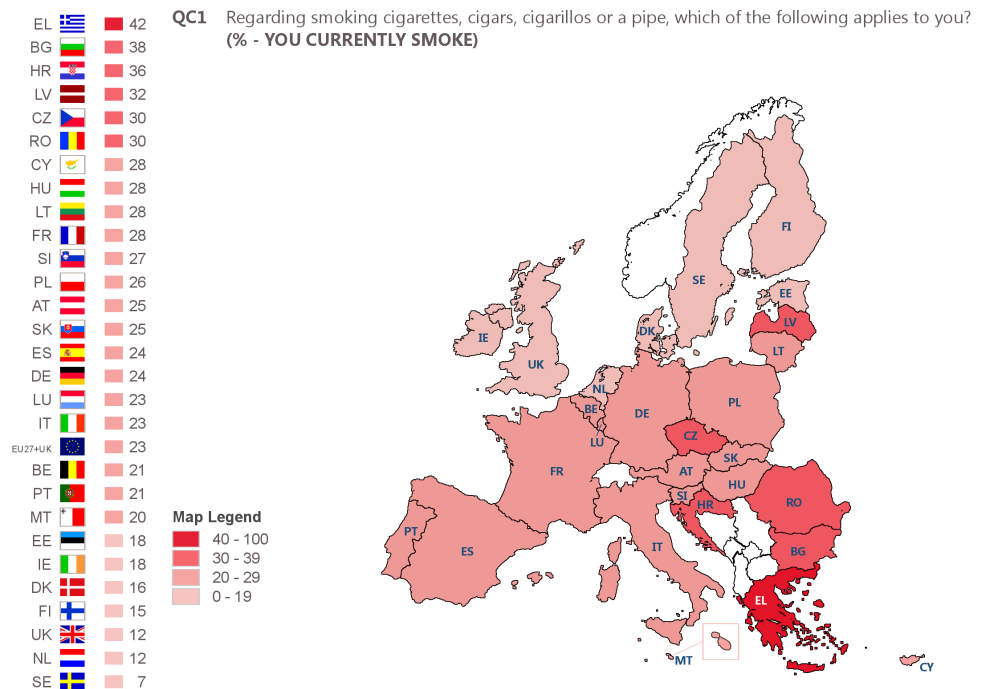
I. TRADITIONAL TOBACCO CONSUMPTION IN THE EUROPEAN UNION

The proportion of smokers has decreased since 2017

Less than a quarter (23%) of the respondents say they currently smoke cigarettes, cigars, cigarillos or a pipe, while more than one in five (22%) say they used to smoke, but have stopped⁸. The majority of respondents (55%) have never smoked.

The proportion of those who say they currently smoke has decreased by three percentage points compared to 2017⁹.

In all but seven countries, at least one in five are smokers. Nonetheless, there are significant differences between countries in the prevalence of smoking. In line with the previous survey, the highest proportions of smokers can be observed in Greece (42%), Bulgaria (38%) and Croatia (36%). At the other end of the spectrum, 7% in Sweden, 12% in the Netherlands and the United Kingdom, and 15% in Finland are smokers. It is worth noting that 18% of the respondents in Sweden use oral tobacco at least monthly¹⁰.



Base: All respondents, N = 28,300

The proportion of smokers continues its downward trend and has declined in the vast majority of countries since 2006¹¹

Across the EU and the UK, there has been a nine-percentage point decline between 2006 and 2020 in the proportion of those who smoke. When the results for the EU27 (without the UK) are taken into account, it can be observed that this proportion has declined by 7 percentage points over the same period (from 32% to 25%). Since 2006, the share of smokers has decreased in 25 countries, most notably in the United Kingdom (-21 pp), the Netherlands (-17 pp), Denmark (-16 pp) and Estonia (-15 pp). This proportion has either only slightly increased or remained stable in the other three countries: Bulgaria (+2 pp), Czechia (+1 pp) and Greece (=). In 17 countries, the proportion of smokers in the current survey is lower than in any of the previous surveys, while elsewhere this figure has tended to fluctuate.

⁸ QC1. Regarding smoking cigarettes, cigars, cigarillos or a pipe, which of the following applies to you? You currently smoke; You used to smoke but you have stopped; You have never smoked; DK.

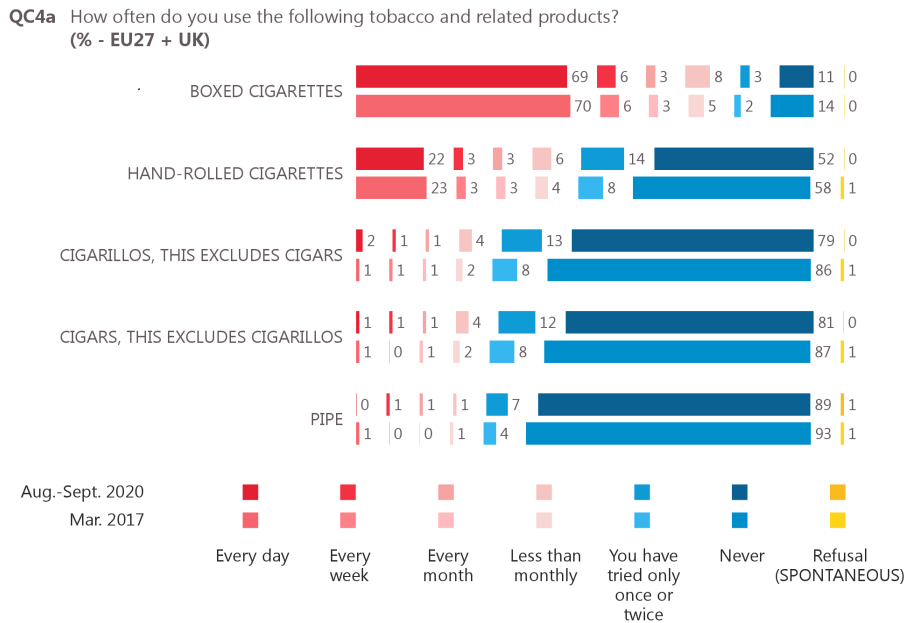
⁹ It should be noted that the text of this question has slightly changed in 2020. Until 2017, the question also included the following sentence: 'In this question and the following questions in this section, smoking cigarettes does not include use of electronic cigarettes'.

¹⁰ The results of this question will be analysed later on in the report in the section 1.4.

¹¹ All surveys conducted since 2006 included the 28 countries covered by this survey except the one conducted in 2012 when Croatia was not included.

Boxed cigarettes are the most popular choice among smokers

Among current traditional smokers, close to eight in ten (78%) are regular users (at least monthly) of boxed cigarettes, while other tobacco products are regularly consumed by fewer smokers, with nearly three in ten (28%) smoking hand-rolled cigarettes and only small proportions smoking cigarillos (4%), cigars (3%), or pipes (2%).



Base: Respondents who smoke, N=6,775

The analysis will focus first on the proportions of smokers who regularly use specific tobacco products, comparing with the figures observed in March 2017, and then at how frequently smokers use at least one of these products¹².

Among regular users of traditional tobacco products, boxed cigarettes are the most popular tobacco product in each country, even though some differences emerge. The proportion of smokers who consume boxed cigarettes ranges from more than nine in ten in Bulgaria and Romania (both 94%) and Latvia (92%) to less than two thirds in the Netherlands (54%), Cyprus (59%), and Ireland and the United Kingdom (both 62%). In 18 countries, the proportion of smokers who smoke boxed cigarettes regularly has decreased since March 2017, most notably in Cyprus (-16 percentage points), the United Kingdom (-13 pp) and Luxembourg (-11 pp). Conversely, this proportion has increased in the remaining ten countries, and particularly in Hungary (+13 pp), Belgium (+6 pp) and France (+4 pp).

In all but five countries, at least one in ten smoke hand-rolled cigarettes, but, once again, there are substantial differences between countries. The highest proportions of hand-rolled cigarettes users can be observed in the United Kingdom (54%), Belgium (42%) and Cyprus (40%). At the other end of the spectrum, smokers in Romania (3%), Bulgaria (5%) and Lithuania (6%) are the least likely to make use of this product. In 15 countries, the proportion of smokers who smoke hand-rolled cigarettes has declined since 2017, with the largest decreases observed in Finland (-15 percentage points), Hungary (-13 pp) and Italy (-10 pp). This share has increased in 12 countries, most notably in the United Kingdom (+14 pp), and Spain and Sweden (both +7 pp), and has remained stable in Denmark.

¹² Results for Cyprus (n=140), Malta (n=101), the Netherlands (n=141) and Sweden (n=82) should be interpreted with caution due to the small base size (<150).

On average, current cigarette smokers smoke more than 14 cigarettes per day

Among those who smoke cigarettes, the average daily consumption is 14.2. Over four in ten (45%) smoke between 11 and 20 cigarettes, while just under three in ten (29%) smoke between six and ten cigarettes. Significantly fewer smoke lower or higher amounts: less than one in ten (8%) smoke 21 cigarettes or more, while 12% smoke between one and five cigarettes and 4% have a daily average of less than one cigarette.

There have been only few changes since the March 2017 survey, with the average daily consumption increasing by 0.5 since March 2017, when it stood at 13.7.

The average number of cigarettes smoked per day varies across countries. In all countries, the average number of cigarettes smoked exceeds ten, with the only exception of Sweden, where this figure stands at 9.1. The highest rate of smoking can be found in Greece, where the average smoker has 18.7 cigarettes daily, followed by Croatia (18.3) and Austria (18). At the opposite end of the scale, apart from Sweden, the lowest average figures can be found in France (11.8), Finland (11.9) and Spain (12). In most countries, change has been minimal since the last survey. The largest increase in the average number of cigarettes smoked per day are observed in Latvia (+1.9), Romania (+1.5) and Sweden (+1.3), while the largest decreases can be found in Malta (-1.9), Slovakia (-1.7) and Cyprus (-1.3). This figure has remained stable in Austria, Estonia and Lithuania.

QC5a On average, how many cigarettes do you smoke each day? (%)

		Average			
		2020	2020 - 2017	2020 - 2014	2020 - 2012
EU27+UK		14,2	▲ 0,5	▼ -0,7	▼ -0,5
BE		12,9	▼ -0,1	▼ -2,9	▼ -2,4
BG		15,7	▼ -0,1	▲ 0,1	▲ 0,7
CZ		15,4	▲ 1,0	▲ 1,2	▲ 1,6
DK		12,7	▼ -0,2	▼ -0,9	▼ -1,8
DE		15,4	▲ 0,7	=	▼ -0,2
EE		12,5	=	▲ 0,6	▼ -0,4
IE		13,1	▼ -0,2	▼ -3,0	▼ -3,3
EL		18,7	▲ 1,2	▼ -1,6	▼ -1,3
ES		12,0	▲ 0,6	▼ -3,1	▼ -2,5
FR		11,8	▼ -0,4	▼ -2,0	▼ -1,8
HR		18,3	▲ 0,8	▲ 1,4	NA
IT		12,8	▼ -0,5	▼ -1,0	▼ -1,0
CY		16,9	▼ -1,3	▼ -3,9	▼ -5,7
LV		12,7	▲ 1,9	▲ 0,3	=
LT		12,6	=	▲ 0,5	▲ 0,2
LU		13,5	▼ -1,1	▼ -0,1	▼ -3,4
HU		15,9	▼ -0,1	▼ -0,4	▲ 0,3
MT		14,0	▼ -1,9	▼ -5,4	▼ -3,9
NL		12,3	▲ 0,6	▼ -1,1	▼ -2,1
AT		18,0	=	▼ -1,5	▼ -14,6
PL		16,4	▼ -13,3	▼ -13,6	▼ -13,5
PT		12,9	▼ -11,1	▼ -13,9	▼ -14,3
RO		16,9	▼ -15,4	▼ -14,8	▼ -14,5
SI		14,3	▼ -13,1	▼ -15,3	▼ -13,8
SK		13,7	▼ -12,4	▼ -8,8	▼ -8,3
FI		11,9	▼ -4	▼ -5,1	▼ -5,8
SE		9,1	▲ 14,2	▲ 10,6	▲ 9,7
UK		12,8	▼ -1	▼ -3,6	▼ -3,1

Base: Respondents who smoke cigarettes, N= 6,507

The average number of cigarettes smoked per day increases steadily with age. The average number of cigarettes smoked per day among those aged 15-24 is 10.9, compared with 15.4 among those aged 40 to 54 and 14.8 of those aged 55 or more.

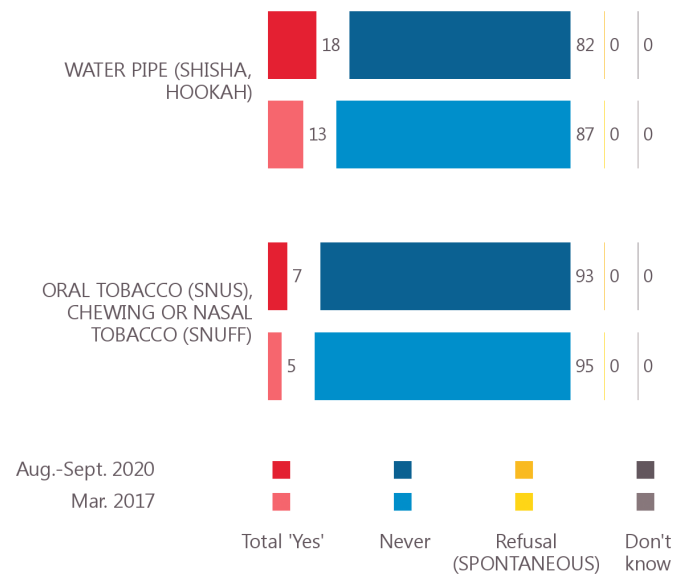
The average number of daily cigarette consumption increases steadily with the length of time the respondent has spent as a smoker. The average ranges from 11.3 among those who have smoked for five years or less to over 15 per day among those who have smoked for more than 20 years.

Almost three in ten respondents aged 15-24 have at least tried using a water pipe

All respondents, regardless of whether they were a current smoker, former smoker, or non-smoker, were asked if they had tried tobacco products other than those mentioned in the previous question: namely, water pipes (shisha, hookah) or oral tobacco (snus) and chewing or nasal tobacco (snuff), and how frequently¹³. This question was also asked in previous surveys.

While a very large share of those surveyed have never tried these tobacco products, 18% have tried a water pipe, which represents an increase from the 13% who gave this answer in March 2017. Less than one in ten respondents (7%) have tried oral, chewing or nasal tobacco, a two-percentage point increase compared to the proportions in March 2017 and December 2014.

QC6 Have you ever used or tried any of the following products? (% - EU27 + UK)



Base: All respondents, N= 28,300

Focusing specifically on young people, those aged 15-24 are generally more likely to have at least tried water pipes. Overall, 29% of young people say they have used them, even though only 6% say they use them on a monthly basis. A larger share say that they have only tried them once or twice (17%).

There is significant country-level variation in the proportions of those who have used a water pipe at least once or twice. Close to or more than four in ten say they have used (or still use) this product in Estonia (46%), and Luxembourg and Latvia (both 39%), while only 4% answer this way in Italy, Poland and Portugal.

The low overall proportion of respondents who use oral and nasal tobacco products can partly be explained by the fact that oral tobacco is illegal in the European Union, with the exception of Sweden. Hence, unsurprisingly, the proportion of oral and nasal tobacco users in Sweden clearly stands out, with more than four in ten (46%) saying that they have tried this type of tobacco products. However, this share has declined by four percentage points compared to 2017, when half of the respondents answered this way.

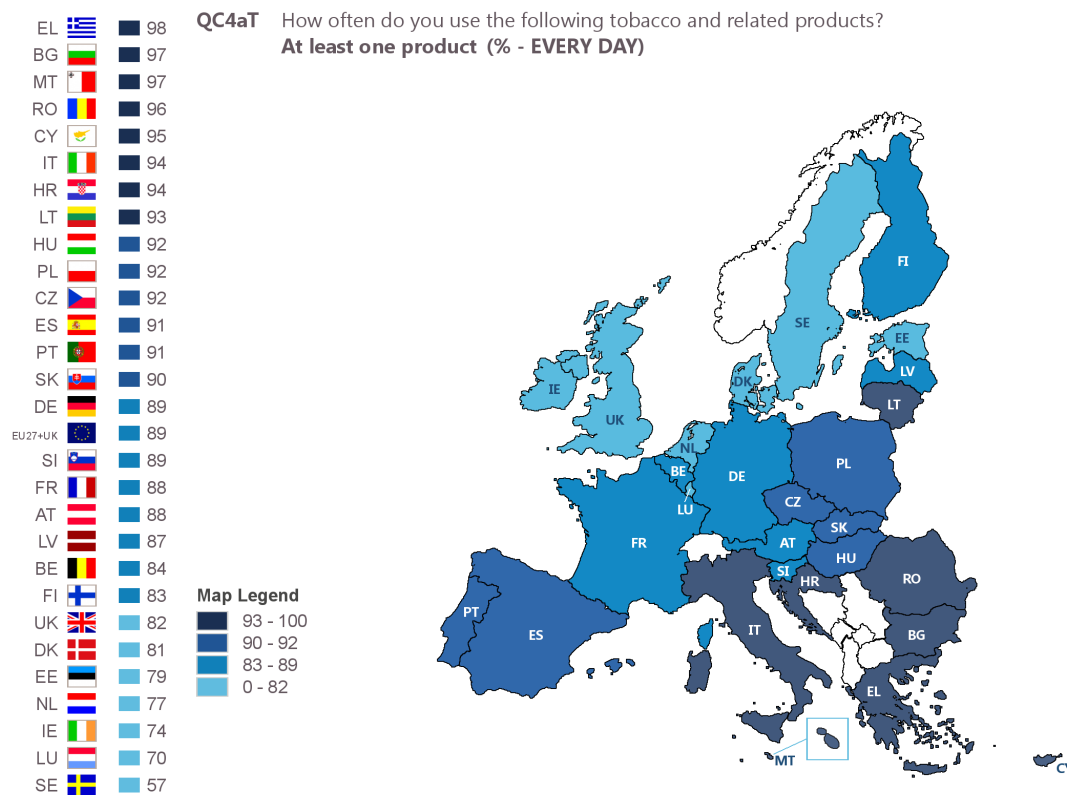
Relatively high proportions who have tried these products can also be found in Finland (20%), Estonia (19%) and Austria (15%). Experience of oral, chewing or nasal tobacco has increased in all these countries, particularly in Estonia (+8 pp). In 20 countries, less than one in ten have tried this type of products.

¹³ QC6. Have you ever used or tried any of the following products? Water pipe (shisha, hookah), oral tobacco (snus), chewing or nasal tobacco (snuff). Yes, every day; Yes, every week; Yes, every month; Yes, less than monthly; Yes, occasionally or regularly but you stopped; Yes, but only once or twice; Never; Refusal; DK.

Almost nine in ten across the EU and the UK consume at least one tobacco or related product daily

Among those who currently smoke, use e-cigarettes or consume heated tobacco products (not wp or oral), almost nine in ten (89%) say they consume at least one tobacco product daily. This proportion has slightly declined since March 2017 (-2 percentage points)¹⁴.

In all countries, at least seven in ten of those who currently smoke, use e-cigarettes or consume heated tobacco products say they consume at least one tobacco product daily. This proportion ranges from 98% in Greece and 97% in Bulgaria and Malta, to 70% in Luxembourg, 74% in Ireland and 77% in the Netherlands. The only exception is Sweden, where just a tiny majority (57%) still give this answer (however, this does not include 16% which say they use on a daily basis oral tobacco).



Base: Respondents who smoke, use e-cigarettes or heated tobacco products, N= 7,110

In 17 countries, the proportion of daily consumers of tobacco and related products (which now includes e-cigarette and heated tobacco product users) has declined compared to March 2017, most notably in Ireland (-18 percentage points) and Luxembourg (-17 pp), followed by the United Kingdom (-7 pp). This proportion has increased by at least five percentage points in Malta (+10 pp), Czechia (+6 pp) and Sweden (+5 pp), with slight increases recorded in other five countries. The share of daily consumers of tobacco products has remained stable in Croatia, Lithuania and Poland.

¹⁴ It should be noted that, while this indicator only included consumers of boxed cigarettes, hand-rolled cigarettes, cigarillos, cigars and pipes, this now also includes e-cigarette and heated tobacco product users.

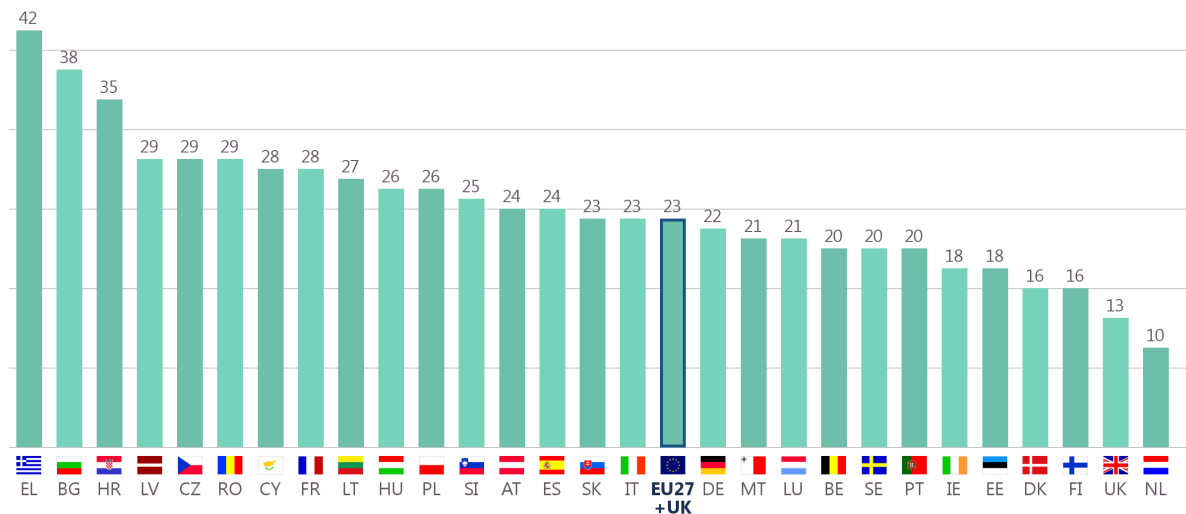
Nearly one quarter of the respondents use tobacco and related products daily

In what follows, the analysis will focus on an indicator of the overall usage of tobacco and related products. This is obtained by combining the results of frequency of usage for traditional tobacco products, oral or nasal tobacco, water pipes (all analysed earlier in the report), as well as for heated tobacco products and e-cigarettes (both analysed in the following section). These results are then recalculated on the total base of the respondents¹⁵.

Across the EU and the UK, almost one quarter (23%) are daily users of tobacco and related products, while only small proportions are occasional users (3%) or have tried these products once or twice (6%). Almost two in ten (19%) are ex-users, while nearly half (49%) have never tried any of these products.

In 22 countries, at least two in ten are daily tobacco and related product users. This proportion ranges from more than one third in Greece (42%), Bulgaria (38%) and Croatia (35%) to 10% in the Netherlands, 13% in the United Kingdom and 16% in Denmark and Finland.

QC4QC6 Total 'At least one product'
(% - TOTAL 'DAILY USERS')



Base: All respondents, N= 28,300

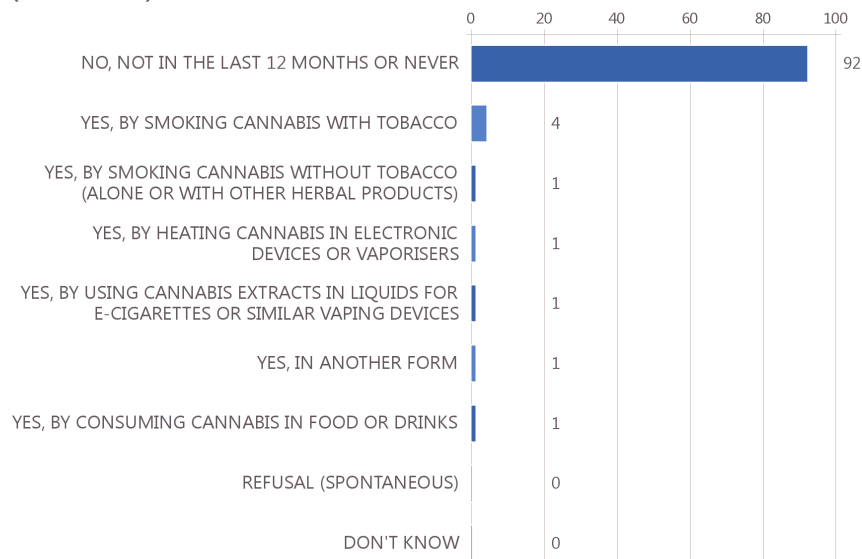
¹⁵ These results were calculated based on the results of QC1, QC4a and QC7..

II. CANNABIS, E-CIGARETTE AND HEATED TOBACCO PRODUCTS CONSUMPTION IN THE EUROPEAN UNION

Less than one in ten have used products containing cannabis in the last 12 months

All the respondents were asked whether they have used products containing cannabis in the last 12 months and how they consumed them¹⁶. The vast majority (92%) say they have not used these products in the last 12 months or they have never used them, while less than one in ten (8%) say they have. Among all the respondents, 4% say they have smoked cannabis with tobacco, while very small proportions have used these products in other ways: by smoking cannabis without tobacco (alone or with other herbal products), by heating cannabis in electronic devices or vaporisers, by using cannabis extracts in liquids for e-cigarettes or similar vaping devices, by consuming cannabis in food or drinks, or in another form (all 1%).

QC7 Have you used products containing cannabis in the last 12 months? (MULTIPLE ANSWERS POSSIBLE)
(% - EU27 + UK)



Base: All respondents, N= 28,300

In ten countries, at least one in ten say they have used products containing cannabis in the last 12 months. This proportion is the highest in Ireland (17%), Luxembourg (16%) and Latvia (14%), while respondents in Greece (1%), and Cyprus and Malta (both 2%) are the least likely to answer this way. Overall, in the large majority of countries, users of products containing cannabis are more likely to smoke cannabis with tobacco than in other ways. The only significant exception is Latvia, where slightly more than one in ten (11%) say they consume cannabis in food or drinks.

The younger the respondents, the more likely they are to have used products containing cannabis in the last 12 months. For instance, 15% among those aged 15-24 have done so, compared with only 3% of those aged 55 or more. Among the younger respondents, the proportion of cannabis product users aged 18-24 is higher than among those aged less than 18 (17% compared with 8%). Students, the unemployed (both 14%) and the self-employed (12%) are more likely than those in other socio-professional categories (2-8%) to have consumed these products. Smokers are much more likely than non-smokers to have used products containing cannabis (15% compared with 5%).

¹⁶ QC7. Have you used products containing cannabis in the last 12 months? No, not in the last 12 months or never; Yes, by smoking cannabis with tobacco; Yes, by smoking cannabis without tobacco (alone or with other herbal products); Yes, by heating cannabis in electronic devices or vaporisers; Yes, by using cannabis extracts in liquids for e-cigarettes or similar vaping devices; Yes, by consuming cannabis in food or drinks; Yes, in another form; Refusal; DK.

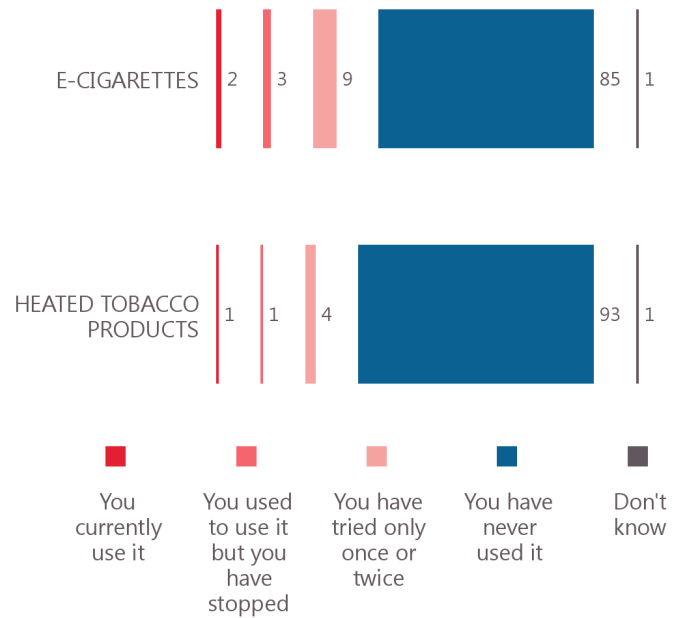
More than one in ten have at least tried e-cigarettes once or twice

Respondents were asked whether they use e-cigarettes and heated tobacco products¹⁷. The large majority of respondents have never used any of these products.

One in seven (14%) have at least tried e-cigarettes, while only around one in twenty (6%) say this for heated tobacco products.

Across the EU and the UK, more than eight in ten (85%) have never used e-cigarettes, while 3% used to use them but have stopped. Close to one in ten (9%) say they have tried them only once or twice, while a small proportion (2%) say they currently use them. There are no significant changes in the results compared to March 2017.

QC3 Thinking about the following products, which of the following applies to you? (% - EU27 + UK)



Base: All respondents, N= 28,300

More than seven in ten respondents in all countries have never used e-cigarettes. Nonetheless, in seven countries, at least two in ten have at least tried e-cigarettes once or twice: Ireland (29%), Estonia (25%), France and the United Kingdom (both 22%), Luxembourg and Latvia (both 21%) and Belgium (20%). At the other end of the spectrum, less than one in ten say this in Poland (6%), Malta, Portugal and Romania (all 7%) and Hungary (9%). In all countries except Malta, the use of e-cigarettes is mostly occasional (only once or twice). In all countries, less than one in twenty are current e-cigarette users, with the only exceptions of Ireland (7%) and France (6%), where this proportion remains small.

More than eight in ten respondents in all countries have never used heated tobacco products. However, in eight countries, at least one in ten have tried them at least once or twice, with the highest shares recorded in Czechia (15%), Latvia (14%), and Austria, Bulgaria and Ireland (all 12%). At the other end of the scale, less than one in twenty in France (3%), and Poland, Malta and the Netherlands (all 4%) answer this way. As with e-cigarettes, in most countries, the use of heated tobacco products is mostly occasional (only once or twice), with very small proportions in all countries being current users.

The younger the respondents, the more likely they are to have at least tried e-cigarettes or heated tobacco products. For instance, a quarter of young people (aged 15-24) have at least tried e-cigarettes, compared with 8% of the oldest respondents (aged 55 or over).

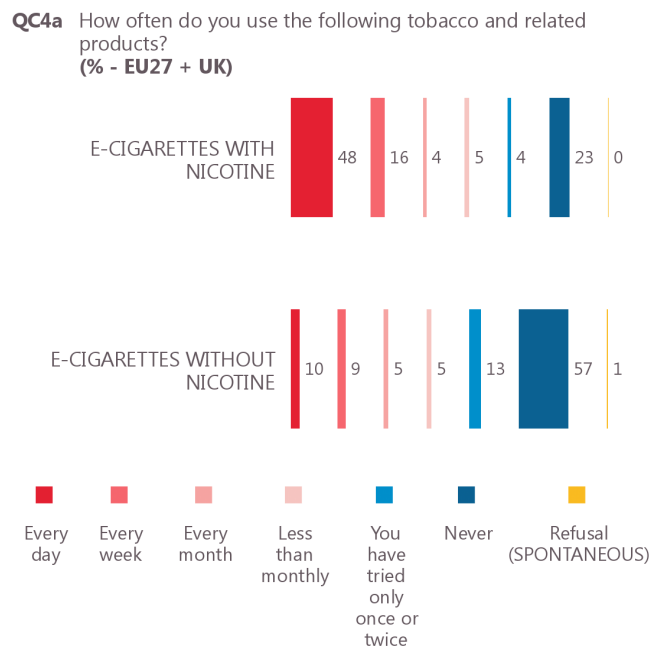
Unsurprisingly, smokers are much more likely than those who have never smoked or who have quit to have tried e-cigarettes (36% of smokers, compared with 8% of non-smokers) or heated tobacco products (16% compared with 4%). Almost half of respondents who have attempted to quit smoking have also tried e-cigarettes (47%), compared with 30% of those who have not attempted to quit this habit.

¹⁷ QC3.1-2. Thinking about the following products, which of the following applies to you? E-cigarettes; Heated tobacco products. You currently use it; You used to use it but you have stopped; You have tried only once or twice; You have never used it; DK.

More than half of current e-cigarette users use this product every day

Nearly half of e-cigarette users (48%) say they use e-cigarettes **with nicotine** every day while only 10% of them use e-cigarettes **without nicotine** every day. In total, more than half of current e-cigarette users (55%) say they use this product (with or without nicotine) every day, and a further 20% say they do so weekly. Smaller proportions use e-cigarettes every month (5%) or less than monthly (4%), while only 1% say they have tried them once or twice. Despite the fact that this question was asked only to current e-cigarette users, 15% of these respondents indicate here that they have never used e-cigarettes with or without nicotine.

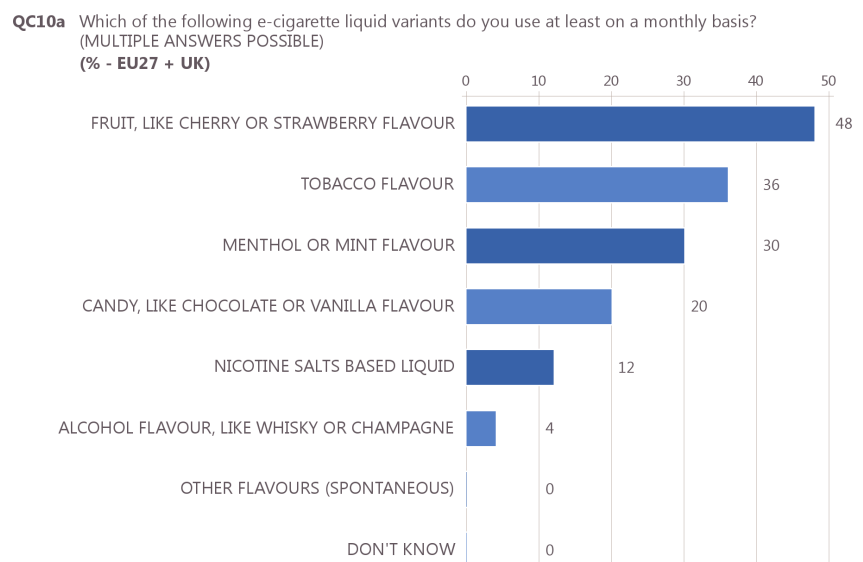
Compared to the previous survey in 2017, the proportion of daily e-cigarette users has decreased by 12 percentage points. This comparison needs, however, to be considered with caution since the question was asked differently¹⁸ in 2017 and therefore results are not directly comparable.



Base: Respondents who use e-cigarettes, N= 708

The most popular e-cigarette flavour among current users is fruit flavour, followed by tobacco flavour

Among those who vape e-cigarette at least on a monthly basis, the most popular flavour of e-cigarette is **fruit, like cherry or strawberry flavour** (48%), followed by **tobacco flavour** (36%). Three in ten say they use **menthol or mint flavour**, while one in five opt for **candy, like chocolate or vanilla flavour** and more than one in ten use **nicotine salts based liquid**¹⁹ (12%). Alcohol flavour, like whisky or champagne is the least popular, favoured by only 4% of respondents.



Compared to 2017, monthly users of e-cigarettes are now much more likely to use menthol or mint flavour (+8 percentage points) and also slightly more likely to use candy or alcohol flavours (both +2 pp)²⁰.

¹⁸ QB12a How often do you use electronic cigarettes or similar electronic devices (e.g. e-shisha, e-pipe)?

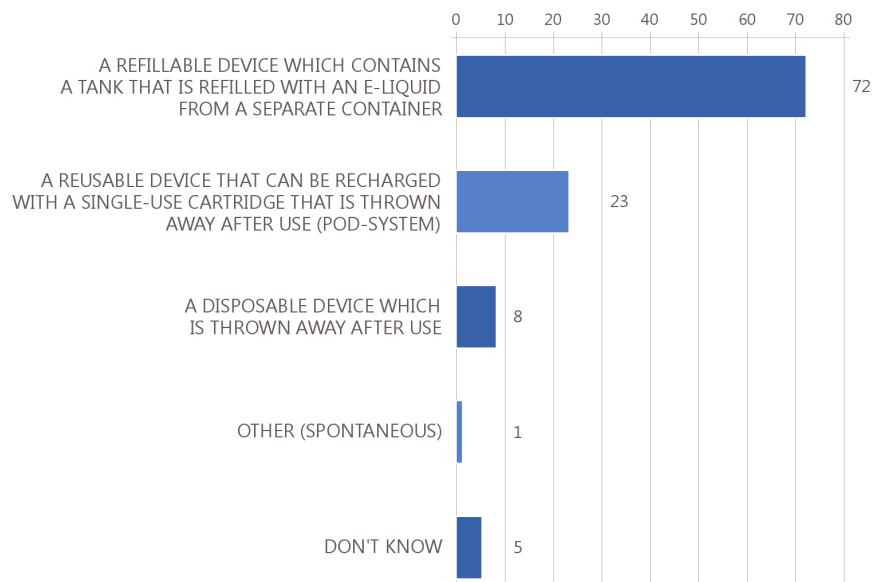
¹⁹ Compared to the other items, nicotine salts based liquid is not a flavour but a product property.

²⁰ 'Nicotine salts based liquid' is a new answer option tested for the first time in the current survey.

The vast majority of current and former e-cigarettes users vape (or used to vape) with a refillable device

More than two thirds of current and former e-cigarettes users (72%) say they use(d) **a refillable device which contains a tank that is refilled with an e-liquid from a separate container**²¹. Slightly less than one fifth (23%) use(d) **a reusable device that can be recharged with a single-use cartridge that is thrown away after use (pod-system)**, while a much smaller proportion (8%) mention **a disposable device which is thrown away after use**.

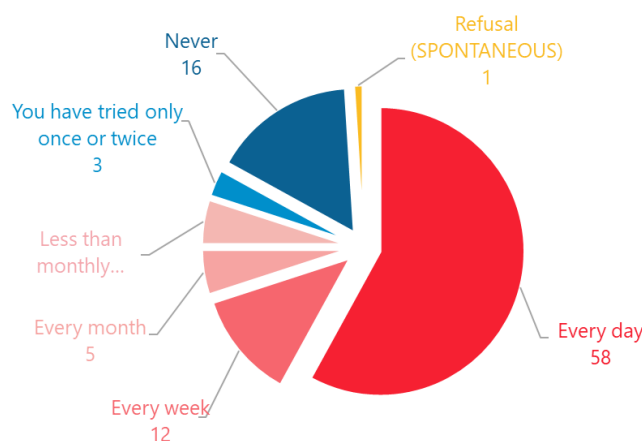
QC9a Which type of e-cigarette do you use or did you use in the past? (MULTIPLE ANSWERS POSSIBLE) (% - EU27 + UK)



Base: Respondents who use or used e- cigarettes, N= 1,696

Nearly six in ten of current users of heated tobacco products use these products every day

QC4a.8 How often did you use the following tobacco and related products? Heated tobacco products (% - EU27 + UK)



(Aug.-Sept. 2020)

Base: Respondents who use heated tobacco products, N= 350

Nearly six in ten of current users of heated tobacco products (58%) say they use these products every day, and a further 12% say they do so on a weekly basis. One in twenty use heated tobacco products every month or less than monthly, while 3% say they have tried them once or twice. Finally, although this question was asked only to current heated tobacco product users, 16% of these respondents indicate here that they have never used heated tobacco products.

²¹ QC9a. Which type of e-cigarette do you use or did you use in the past? (MULTIPLE ANSWERS POSSIBLE) A reusable device that can be recharged with a single-use cartridge that is thrown away after use (pod-system); A refillable device which contains a tank that is refilled with an e-liquid from a separate container; A disposable device which is thrown away after use; Other (SPONTANEOUS); DK.

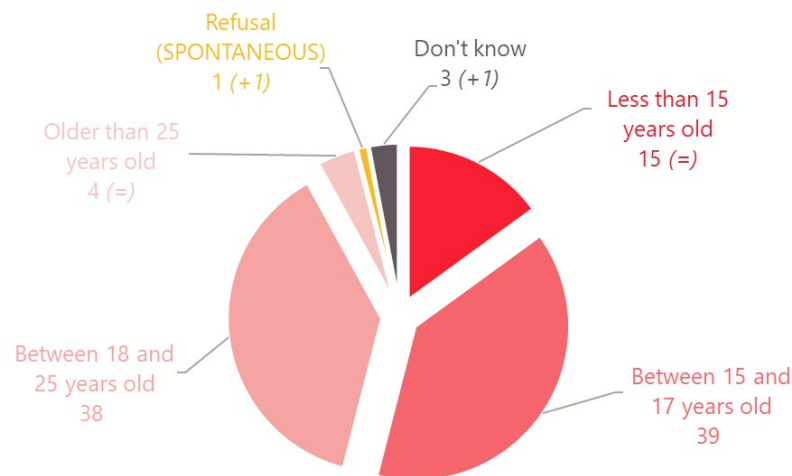
III. STARTING AND STOPPING TOBACCO SMOKING

More than half began smoking before the age of 18

Those who said that they currently smoke or used to smoke were asked at what age they took up smoking²². On average, respondents who are smokers or ex-smokers started smoking regularly aged under 18 (17.8). Over half (54%) of current or former smokers developed a regular smoking habit before this age. Within this proportion, almost four in ten (39%) began smoking aged between 15 and 17, and a further 15% started when they were less than 15 years old. Less than four in ten (38%) took up regular smoking habits between the age of 18 and 25, while less than one in twenty (4%) did this when they were older than 25.

These figures have remained broadly stable compared to the previous survey in 2017.

QC2a How old were you when you started smoking on a regular basis, i.e. at least once a week?
(% - EU27 + UK)



(Aug.-Sept. 2020)

Base: Respondents who smoke or used to smoke, N= 12,817

The average age at which respondents began smoking is similar across all the countries, as the spread between the lowest and highest figures is only around three years. The average age for starting smoking is the lowest in Denmark (16.5), Malta (16.9) and the United Kingdom (17.1). This compares to an average age of more than 19 years old in Lithuania (19.5), Cyprus (19.4) and Poland (19.3).

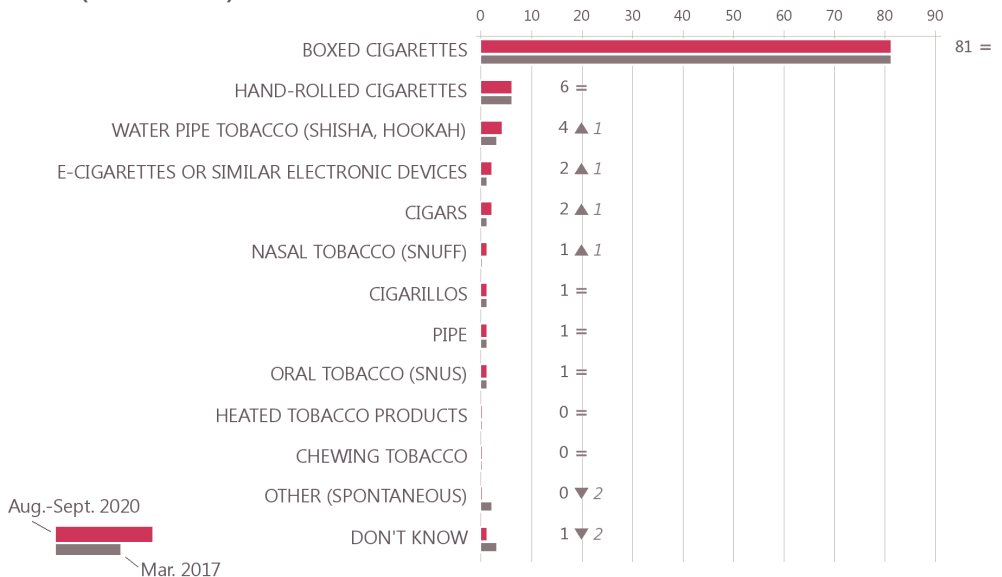
In most cases, there has been little change in the average age at which respondents began smoking since the last survey. The main exception is Italy, where the average age has increased by 1.1 years. Other notable increases are observed in Hungary (+0.8) and Sweden (+0.7). At the other end of the scale, the average starting age has decreased by 0.7 years in Germany and Latvia and by 0.6 years in Denmark and Luxembourg.

²² QC2a. How old were you when you started smoking on a regular basis, i.e. at least once a week?

Most smokers or former smokers had their first “tobacco” experience with boxed cigarettes

Those who currently smoke, used to smoke, or who have tried at least one tobacco product were asked which product they used first²³. Among all respondents who have at least tried tobacco products, by far the most common first experience of tobacco is with boxed cigarettes. Over eight in ten (81%) mention them, compared with around one in twenty (6%) who mention hand-rolled cigarettes and less than one in twenty who cite other forms of tobacco or comparable products, i.e. water pipe tobacco (shisha, hookah) (4%), cigars, e-cigarettes or similar electronic devices (both 2%), cigarillos, a pipe, oral tobacco (snus) and nasal tobacco (snuff) (all 1%).

QC13 Which of the following products did you use or try first? (% - EU27 + UK)



There have been no notable changes since the March 2017 survey²⁴.

Base: Respondents who have at least tried tobacco products, N= 16,787

In all countries, more than two thirds among respondents who have at least tried tobacco products say that their first experience was through smoking boxed cigarettes. This proportion ranges from more than nine in ten in Greece (95%), Portugal (93%) and Poland (91%), to around seven in ten or less in Austria and Luxembourg (both 71%), Sweden (69%) and the Netherlands (67%).

In all countries, one in ten or less of these respondents say that their first experience with tobacco products was with hand-rolled cigarettes. The only exception is the Netherlands, where 17% mention hand-rolled cigarettes. Other proportions that stand out are the 19% in Sweden who mention their first experience was with oral tobacco and the 10% in Croatia citing cigars.

The socio-demographic breakdown shows that:

- Women (84%) are slightly more likely than men (79%) to have had their first experience of tobacco by smoking boxed cigarettes.
- Less than six in ten (58%) of those aged between 15 and 24 mention boxed cigarettes, compared with more than three quarters (77-87%) of those in all other age categories.
- A significant proportion of young respondents started smoking with water pipes (16%) or with hand-rolled cigarettes (13%). These shares are far higher than the average (4% and 6%, respectively).

²³ QC13. Which of the following products did you use or try first? Boxed cigarettes; Hand-rolled cigarettes; Cigars; Cigarillos; Pipe; Water; Pipe tobacco (shisha, hookah); Oral tobacco (snus); Chewing tobacco; Nasal tobacco (snuff); E-cigarettes or similar electronic devices; Heated tobacco products; Other (SPONTANEOUS); DK.

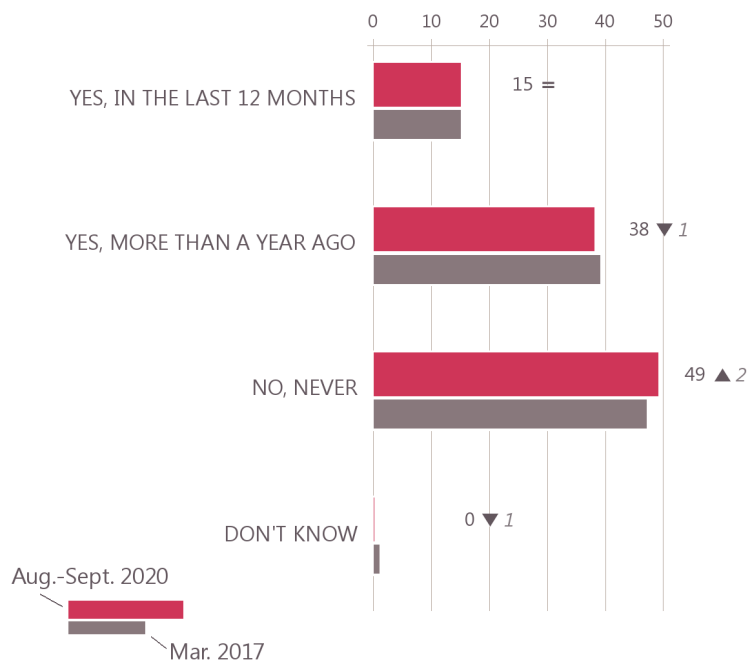
²⁴ 'Heated tobacco products' is a new answer option tested for the first time in the current survey.

More than half of current smokers have attempted to quit smoking

Current smokers were asked if they have ever tried to give up smoking²⁵. More than half (53%) of those who currently smoke have at some point attempted to stop. Most of those attempts took place more than a year ago, with more than one third (38%) answering this. Less than a fifth (15%) have attempted to give up smoking in the last 12 months. Conversely, almost half of current smokers (49%) have never tried to quit smoking.

After a six-percentage point decrease between 2014 and 2017, the proportion of smokers who say they have at some point attempted to quit smoking has remained largely stable since 2017 (-1 percentage point).

QC15a Have you ever tried to quit smoking? (MULTIPLE ANSWERS POSSIBLE) (% - EU27 + UK)

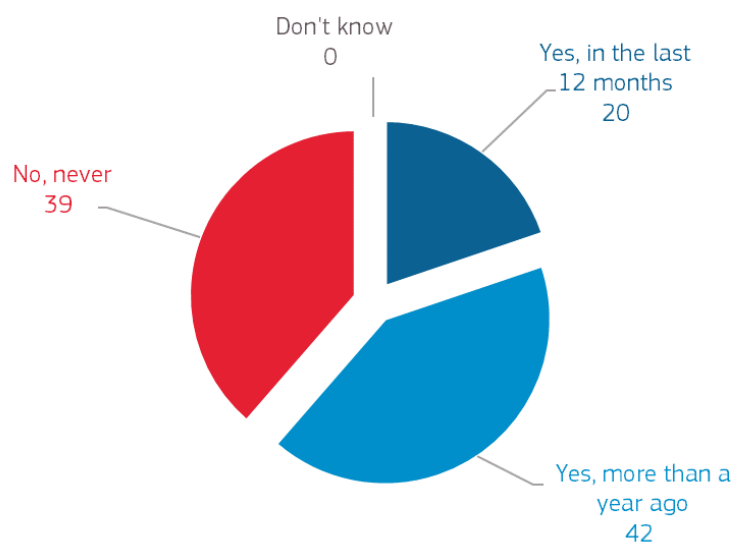


Base: Respondents who smoke, N= 6,569

Among the dual users, i.e. they use these products on top of their traditional tobacco product consumption, more than six in ten (62% compared with 53% for the overall current smokers) have at some point attempted to stop. Most of those attempts took place more than a year ago, with more than one in four (42% compared with 38%) answering this. A fifth (20% compared with 15%) have attempted to give up smoking in the last 12 months. Conversely, less than four in ten (39% compared with 49%) have never tried to quit smoking.

Among those dual users, those smoking both traditional tobacco products and e-cigarettes are the respondents with the higher level of attempt to quit smoking: overall 68% have at some point attempted to stop, a fourth (25%) in the last 12 months and a 43% more than a year ago.

QC15a Have you ever tried to quit smoking? **Dual users** (% - EU27 + UK)



Base: Respondents who are 'dual users' i.e. they use these products on top of their traditional tobacco product consumption, N= 652

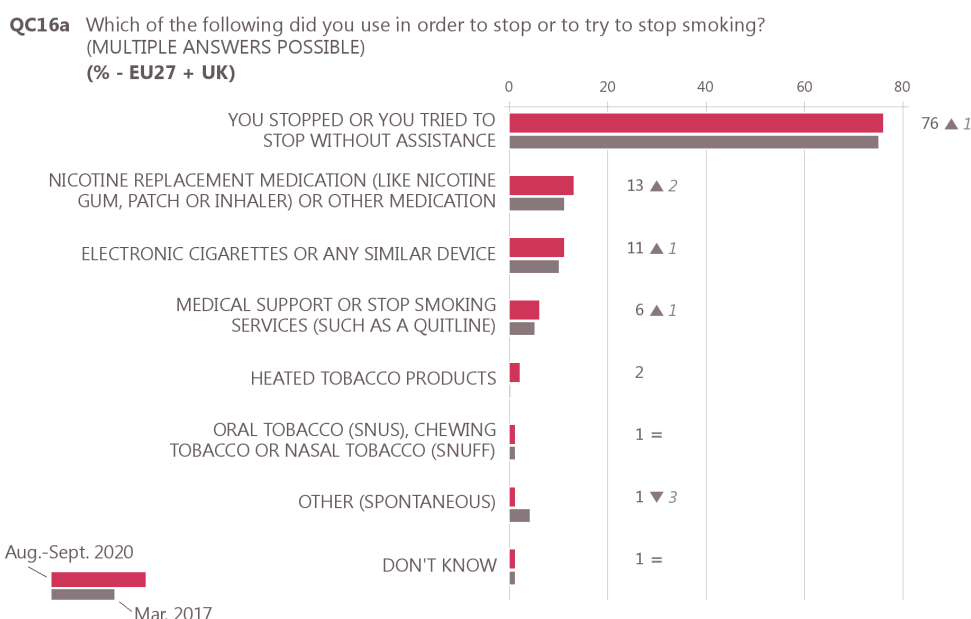
²⁵ QC15a. Have you ever tried to quit smoking? Yes, in the last 12 months; Yes, more than a year ago; No, never; DK.

More than three quarters of those who have stopped smoking, or tried to stop, did not seek assistance

Those who tried stopping, along with former smokers, were asked whether they used any aids when giving up – or attempting to give up – smoking²⁶. Only a minority of smokers who have given up smoking or have attempted to give up smoking used one of the methods of assistance available. More than three quarters (76%) say they gave up smoking – or attempted to give up smoking – **without using any of these methods**.

Just over one in ten (13%) mention **nicotine replacement medications (like nicotine gum, patch or inhaler) or other medications**, and **electronic cigarettes or similar devices** (11%). Other options are less popular: only 6% used **medical support or stop smoking services (such as a quitline)**, 2% switched to using **heated tobacco products** and only 1% to using **oral, chewing or nasal tobacco**.

There are no notable differences in the results for this question compared with the previous survey in March 2017²⁷.



Base: Respondents who stopped or tried to stop smoking, N= 9,606

There are notable differences in the shares of those who attempted to stop smoking without assistance. Overall, in 19 countries, at least three quarters among former smokers and those who tried stopping say they have attempted to do so without assistance. This proportion is the highest among those in Croatia and Bulgaria (both 88%) and Slovenia (87%). At the other end of the spectrum, two thirds of these respondents or less say this in Austria (52%), and Denmark, Sweden and the United Kingdom (all 66%).

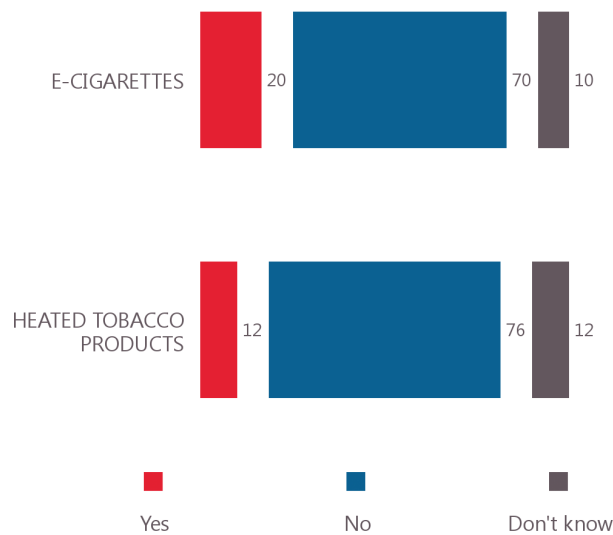
²⁶ QC16a. Which of the following did you use in order to stop or to try to stop smoking? Nicotine replacement medication (like nicotine gum, patch or inhaler) or other medication; Electronic cigarettes or any similar device; Heated tobacco products; Oral tobacco (snus), chewing tobacco or nasal tobacco (snuff); Medical support or stop smoking services (such as a quitline); You stopped or you tried to stop without assistance; Other (SPONTANEOUS); DK.

²⁷ 'Heated tobacco products' is a new answer option tested for the first time in the current survey.

Overwhelming majorities of those with no or little experience with e-cigarettes think e-cigarettes or heated tobacco products do not help tobacco smokers to quit

Respondents who have only tried e-cigarettes once or twice or have never used them were asked whether they think that the use of e-cigarettes or heated tobacco products help tobacco smokers to quit²⁸. Two in ten of these respondents think the use of e-cigarettes is helpful to quit smoking, while a smaller proportion (12%) say this of heated tobacco products. In contrast, overwhelming majorities (70% and 76%, respectively) think that neither of these products help smokers to stop.

QC10c Do you think that the use of these products help tobacco smokers to quit?
(% - EU27 + UK)



Base: Respondents who have never used e-cigarettes or HTP, or have only tried them, N= 26,354

In 20 countries, at least one in ten of those who have no or little experience with e-cigarettes think the use of e-cigarettes help tobacco smokers to quit. The United Kingdom (51%) stands out for a particularly high share of these respondents who think e-cigarettes can be helpful. In addition, high proportions think this way in Ireland (39%), in Denmark (29%), and France (26%). At the opposite end of the scale, only 6% in Lithuania and 7% in Romania and Slovenia say this.

²⁸ QC10c.1-2. Do you think that the use of these products help tobacco smokers to quit? E-cigarettes; Heated tobacco products. Yes; No; DK.

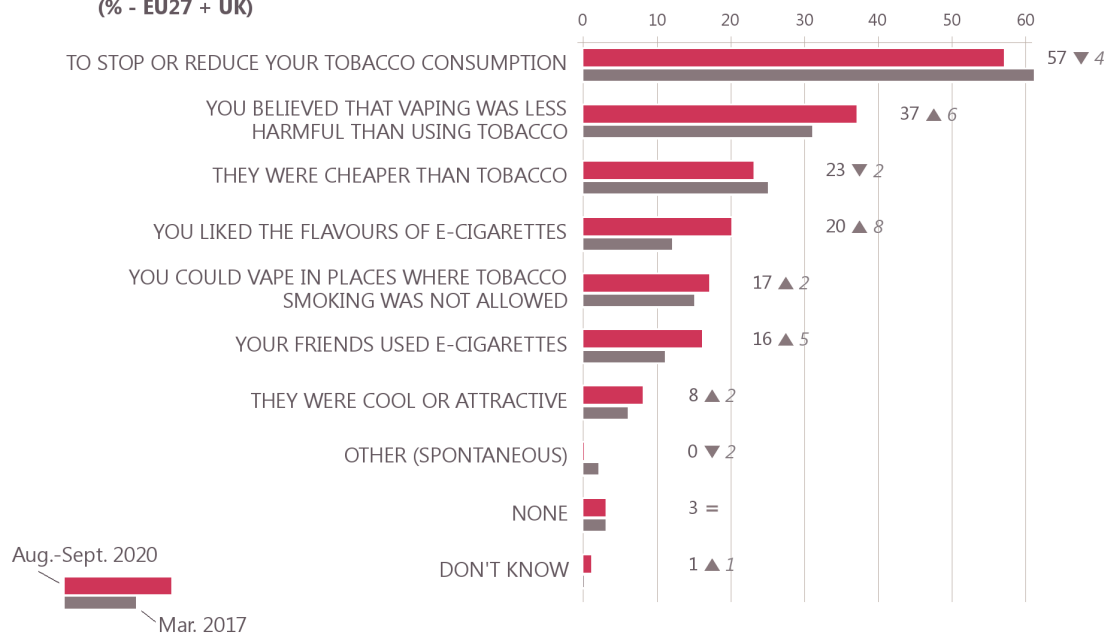
IV. STARTING AND STOPPING ELECTRONIC CIGARETTES OR HEATED TOBACCO PRODUCTS

More than half took up e-cigarettes to try to curb their tobacco consumption

By far the most frequently mentioned factor for taking up e-cigarettes is **to stop or reduce tobacco consumption**²⁹. More than half of e-cigarette users (57%) say they started vaping for this reason. More than one third (37%) say they started because they **believed that vaping was less harmful than using tobacco**, while around one quarter (23%) mention the fact that **they were cheaper than tobacco** as a reason. Two in ten or less cite the fact that they **liked the flavours of e-cigarettes** (20%), that they **could vape in places where tobacco smoking was not allowed** (17%) and that their **friends used e-cigarettes** (16%). Less than one in ten (8%) mention the fact that they thought e-cigarettes **were cool or attractive** as a reason to start using them.

When comparing these results with those of the previous survey in 2017, the most notable changes are a decrease in the proportion of users saying they started using e-cigarettes to stop or reduce tobacco smoking (-4 percentage points) and significant increases in the shares of those who mention that they liked the flavours of e-cigarettes (+8 pp), that they believed that vaping was less harmful than using tobacco (+6 pp) and that their friends used e-cigarettes (+5 pp).

QC11a Which of the following factors, if any, were important in your decision to start using e-cigarettes? (MAX. 3 ANSWERS) (% - EU27 + UK)



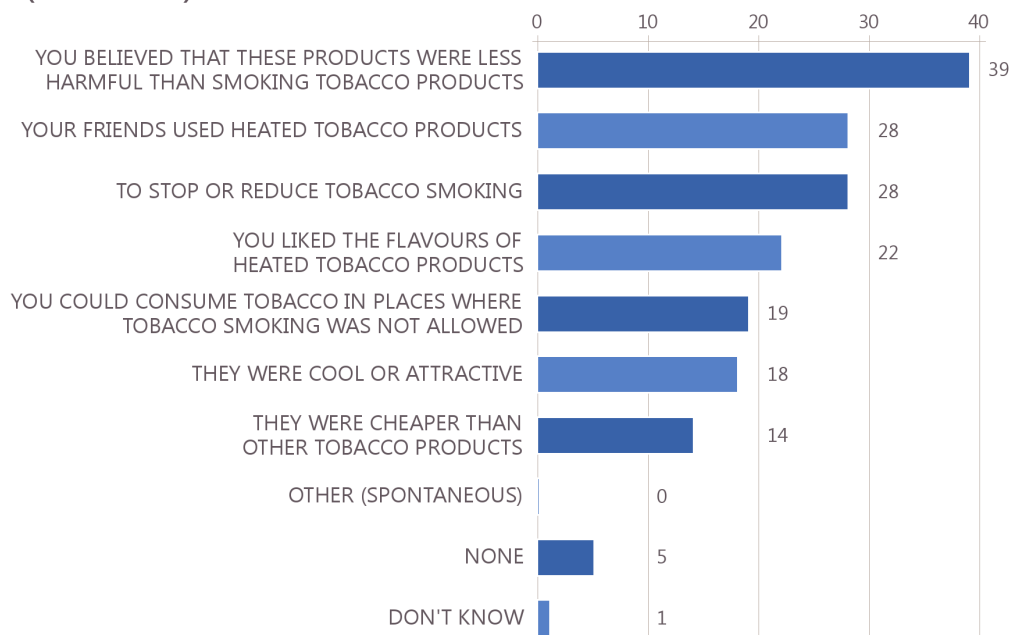
Base: Respondents who use or used e-cigarettes, N= 1,696

²⁹ QC11a. Which of the following factors, if any, were important in your decision to start using e-cigarettes? To stop or reduce your tobacco consumption; They were cool or attractive; You could vape in places where tobacco smoking is not allowed; They were cheaper than tobacco; Your friends used e-cigarettes; You liked the flavours of e-cigarettes; You believed that vaping was less harmful than using tobacco; Other (SPONTANEOUS); None (SPONTANEOUS); Don't know.

Almost four in ten started using heated tobacco products because they believed that these products were less harmful than smoking tobacco products

Unlike in the case of e-cigarettes, users of heated tobacco products most frequently mention the fact that **they believed that these products were less harmful than smoking tobacco products** (39%) as an important factor in their decision to start using them. More than one quarter say they started **to stop or reduce tobacco smoking** or because **their friends used heated tobacco products** (both 28%), while around two in ten mention the fact that they **liked the flavours of heated tobacco products** (22%) or that they **could consume tobacco in places where tobacco smoking was not allowed** (19%). Less than two in ten cite the fact that they thought these products were **cool or attractive** (18%) or that **they were cheaper than other tobacco products** (14%).

QC11b Which of the following factors, if any, were important in your decision to start using heated tobacco products? (MAX. 3 ANSWERS)
(% - EU27 + UK)



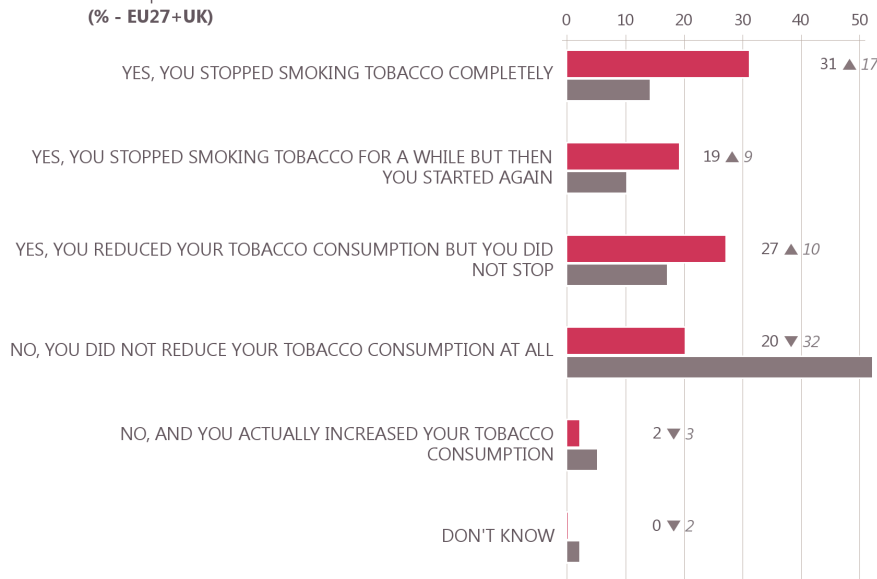
Base: Respondents who use or used heated tobacco products, N= 419

Just three in ten e-cigarette and heated tobacco product users say these products helped them stop smoking tobacco completely

Three in ten smokers and former smokers who use, or have used, e-cigarettes and/or heated tobacco products say that these products helped them to stop smoking tobacco completely³⁰. A further 17% say that they stopped smoking tobacco for a while but then they started again, and more than one quarter (27%) that they reduced their tobacco consumption but did not stop. Finally, one quarter of these respondents answer that these products did not help them to reduce smoking, with 22% saying they did not reduce their tobacco consumption at all and 3% affirming that they actually increased their tobacco consumption.

In 2017, a majority of former or current e-cigarette users (52%) said that these devices did not help them to reduce their tobacco consumption at all, while this proportion stands at 22% in the present survey. In addition, while 30% of former or current e-cigarettes and/or heated tobacco product users now say that these products helped them to stop smoking tobacco completely, this proportion stood at only 14% among former or current e-cigarette users in 2017 and 2014.

QC12a You said that you smoke or used to smoke tobacco but also use, used or tried electronic cigarettes or a similar device. Did the use of electronic cigarettes or any similar device help you to stop or reduce your tobacco consumption? (% - EU27+UK)



Base: Respondents who smoke or used to smoke, and use or used e-cigarettes, N= 1,321

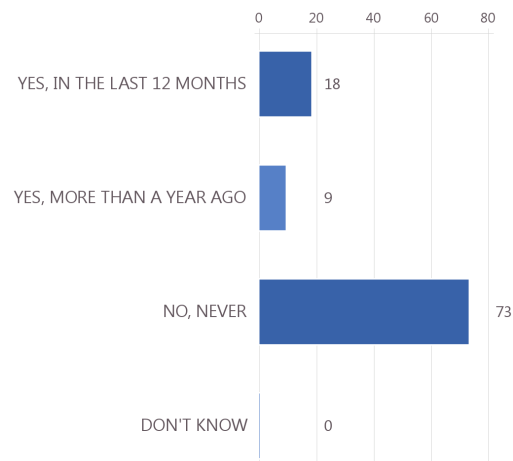
³⁰ QC12a. You said that you smoke or used to smoke tobacco but also use, used or tried electronic cigarettes or a similar device/heated tobacco products/electronic cigarettes or heated tobacco products. Did the use of electronic cigarettes or any similar device/heated tobacco products/electronic cigarettes or heated tobacco products help you to stop or reduce your tobacco consumption? Yes, you stopped smoking tobacco completely; Yes, you stopped smoking tobacco for a while but then you started again; Yes, you reduced your tobacco consumption but you did not stop; No, you did not reduce your tobacco consumption at all; No, and you actually increased your tobacco consumption; DK.

More than one quarter of e-cigarette or heated tobacco product users who are non-traditional smokers have attempted to stop using these products

More than one quarter (27%) of those who do not smoke but are current e-cigarette and heated tobacco product users have at some point attempted to stop using these products³¹. Among these respondents, 18% have attempted to stop in the last 12 months and less than one in ten (9%) have done this more than a year ago. Conversely, close to three quarters (73%) have never tried to stop using e-cigarettes or heated tobacco products.

A country-level analysis on the results of this question is not possible due to low sample sizes.

QC15b Have you ever tried to stop using e-cigarettes or heated tobacco products? (MULTIPLE ANSWERS POSSIBLE)
(% - EU27 + UK)



Base: Respondents who do not smoke but use e-cigarettes or heated tobacco products, N= 341

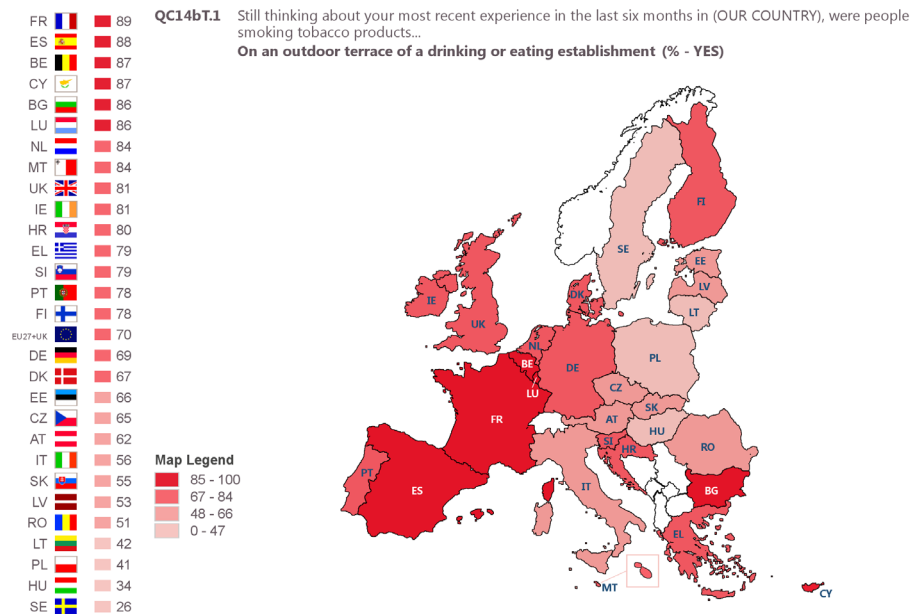
³¹ QC15b. Have you ever tried to stop using e-cigarettes or heated tobacco products? Yes, in the last 12 months; Yes, more than a year ago; No, never; DK.

V. EXPOSURE TO TOBACCO SMOKE AND E-CIGARETTES OR HEATED TOBACCO PRODUCTS IN PUBLIC PLACES

Seven in ten say they recently encountered people smoking tobacco products on an outdoor terrace of a drinking or eating establishment

Seven in ten respondents who visited a drinking or eating establishment in the last six months say that, the last time they did so, people were smoking on an outdoor terrace. Conversely, a minority (30%) say people were not smoking.

A majority in 24 countries say people were smoking on an outdoor terrace of a drinking or eating establishment last time they visited one in the last six months. The highest proportions saying this can be observed in France (89%), Spain (88%), and Belgium and Cyprus (both 87%). At the opposite end of the scale, less than half in Sweden (26%), Hungary (34%), Poland (41%) and Lithuania (42%) answer this way.

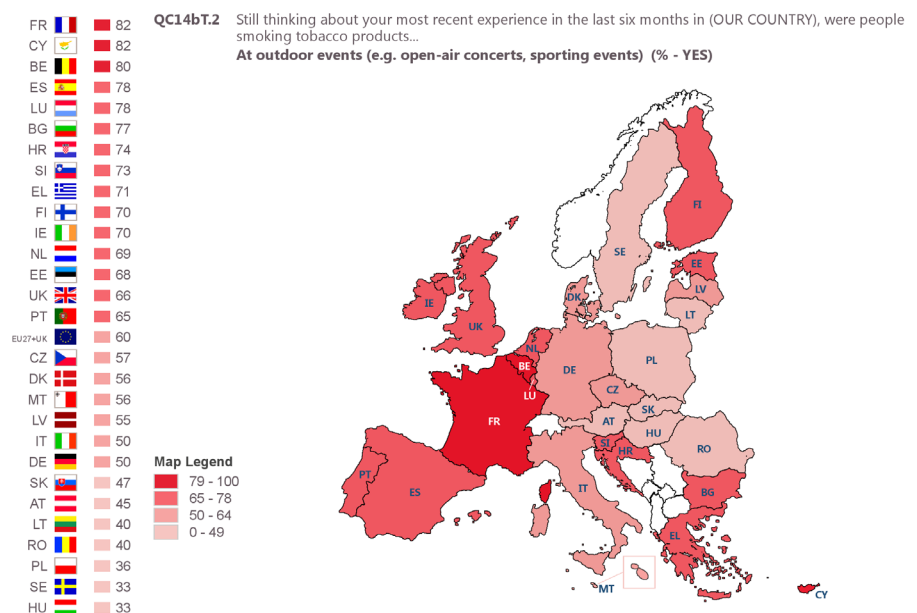


Base: All respondents excluding those who had not visited an outdoor terrace in the last 6 months, N= 26,437

Six in ten say the last time they attended an outdoor event in the last six months people were smoking tobacco products

Six in ten respondents who attended outdoor events (e.g. open-air concerts, sporting events) in the last six months say that, the last time they did so, people were smoking tobacco products, while four in ten say people were not smoking.

In 21 countries, at least half of those who attended outdoor events in the last six months say that, the last time they did so, people were smoking tobacco products. This proportion ranges from at least eight in ten in France and Cyprus (both 82%) and Belgium (80%) to less than four in ten in Hungary and Sweden (both 33%) and Poland (36%).

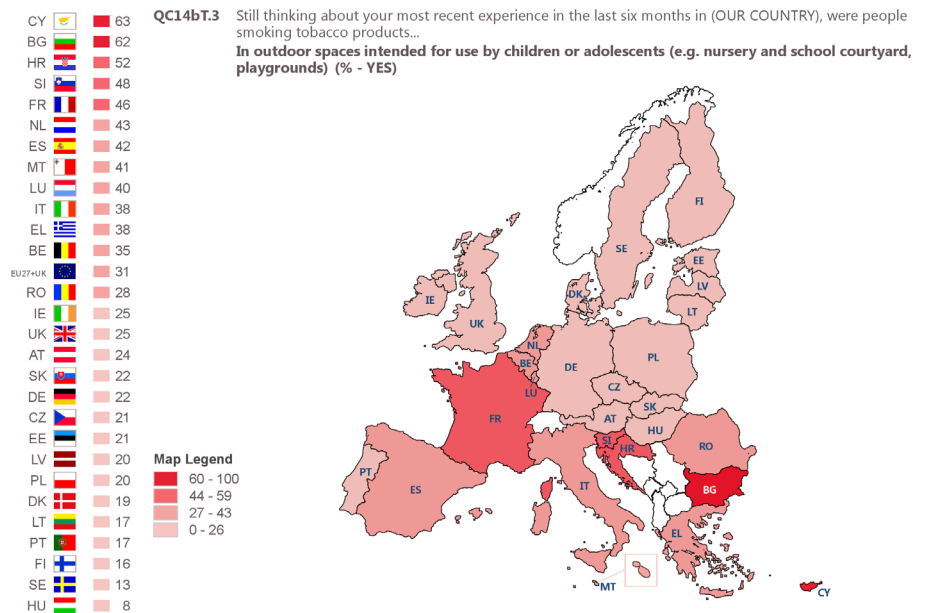


Base: All respondents excluding those who had not been to an outdoor event, N= 24,535

Around three in ten say the last time they visited outdoor spaces intended for use by children or adolescents in the last six months people were smoking tobacco products

Around three in ten (31%) respondents who went to outdoor spaces intended for use by children or adolescents (e.g. nursery and school courtyard, playgrounds) in the last six months say that, the last time they did so, people were smoking tobacco products, while more than two thirds (69%) say people were not smoking.

In 12 countries, more than one third of those who visited outdoor spaces intended for use by children or adolescents in the last six months have encountered people smoking tobacco products the last time they did so. This proportion is particularly high in Cyprus (63%), Bulgaria (62%) and Croatia (52%), where a majority say people were smoking in these outdoor spaces. Conversely, those in Hungary (8%), Sweden (13%) and Finland (16%) are the least likely to answer this way.

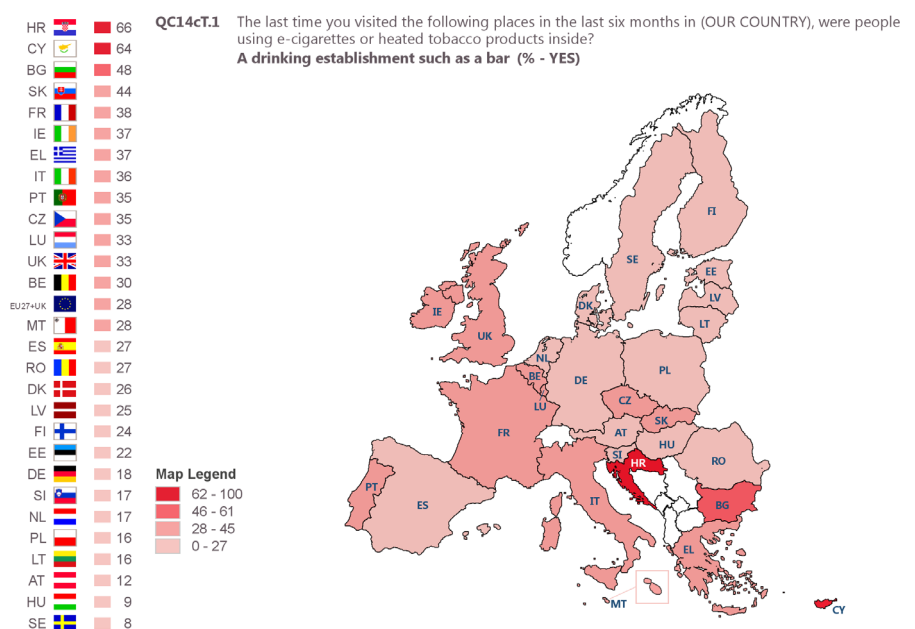


Base: All respondents excluding those who had not visited outdoor spaces used by children or adolescents, N= 24,836

More than one quarter say people were using e-cigarettes or heated tobacco products inside the last time they visited a bar in the last six months

More than one quarter (28%) of respondents who visited a drinking establishment, such as a bar, in the last six months say that, the last time they did so, people were using e-cigarettes or heated tobacco products *inside*, while more than seven in ten (72%) say that nobody was using these products.

In 12 countries, at least one third of those who visited a drinking establishment, such as a bar, in the last six months say that, the last time they did so, people were using e-cigarettes or heated tobacco products *inside*. This proportion is particularly high in Croatia (66%) and Cyprus (64%), where around two thirds say this, followed by Bulgaria (48%). At the other end of the scale, 8% in Sweden, 9% in Hungary and 12% in Austria answer this way.

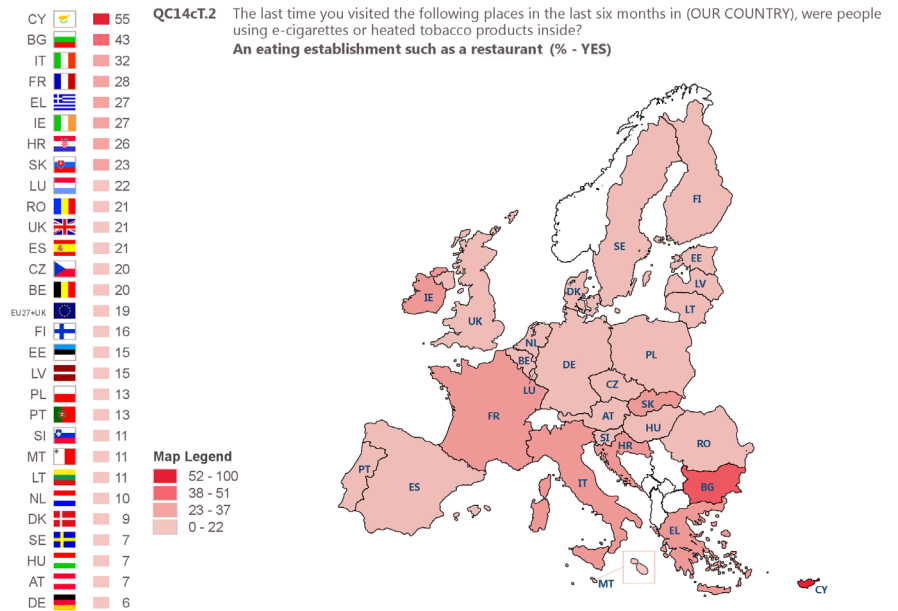


Base: All respondents excluding those who had not visited a bar in the last 6 months, N= 25,231

Nearly two in ten have encountered people using e-cigarettes or heated tobacco products *inside* the last time they visited a restaurant in the last six months

Close to two in ten (19%) respondents who visited an eating establishment, such as a restaurant, in the last six months say that, the last time they did so, people were using e-cigarettes or heated tobacco products *inside*, while around eight in ten (81%) say that nobody was using these products.

In all countries, less than half have encountered people using e-cigarettes or heated tobacco products *inside* the last time they visited an eating establishment, such as a restaurant, in the last six months. The only exception is Cyprus, where 55% answer this way. Apart from Cyprus, the highest proportions saying this can be found in Bulgaria (43%), Italy (32%) and France (28%). Conversely, those in Germany (6%), and Austria, Hungary and Sweden (all 7%) are the least likely to answer this way.

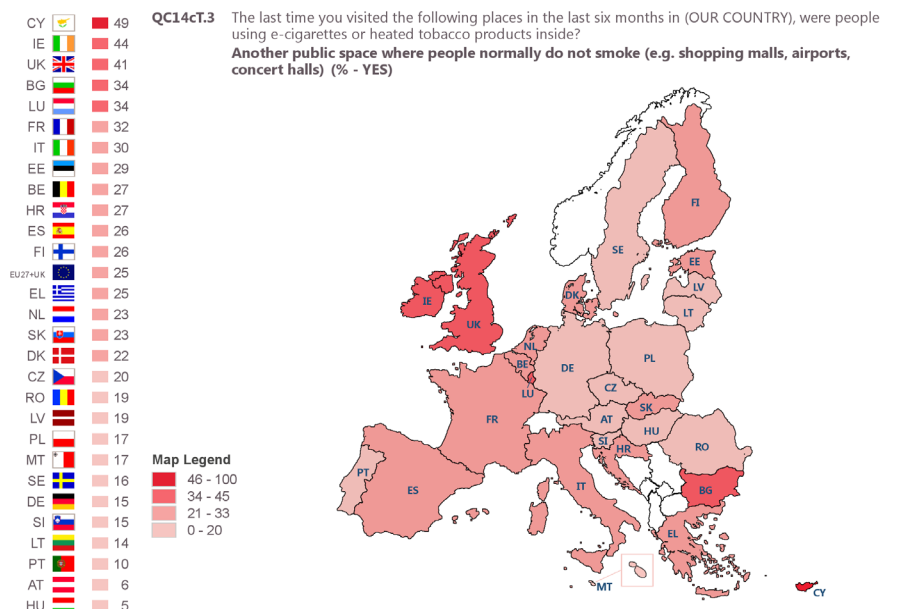


Base: All respondents excluding those who had not visited a restaurant in the last 6 months, N= 25,666

One quarter say people were using e-cigarettes or heated tobacco products *inside* the last time they visited a public space where people normally do not smoke

One quarter of respondents who, in the last six months, went to another public space where people normally do not smoke (e.g. shopping malls, airports, concert halls) say that, the last time they did so, they encountered people using e-cigarettes or heated tobacco products *inside*. Conversely, three quarters of these respondents say people were not using these products.

In 13 countries, at least one quarter of those who went to another public space where people normally do not smoke in the last six months say that, the last time they did so, people were using e-cigarettes or heated tobacco products *inside*. This proportion is especially high in Cyprus (49%), Ireland (44%) and the United Kingdom (41%), while the opposite is true in Hungary (5%), Austria (6%) and Portugal (10%).



Base: All respondents excluding those who had not visited a public space where people do not smoke in the last 6 months, N= 25,329

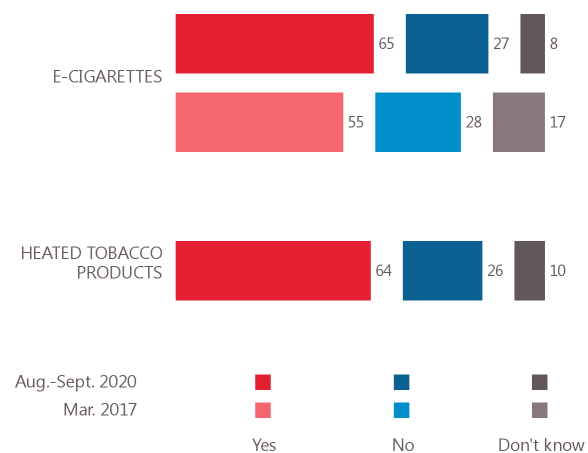
VI. AWARENESS OF AND EXPOSURE TO ADVERTISING OF E-CIGARETTES, ATTITUDES TOWARDS TOBACCO, E-CIGARETTES AND HEATED TOBACCO PRODUCTS POLICIES

Nearly two thirds think e-cigarettes and heated tobacco products are harmful to the health of their users

Respondents were asked for their opinions on whether e-cigarettes and heated tobacco products are harmful to the health of their users³². Nearly two thirds of respondents think e-cigarettes (65%) and heated tobacco products (64%) are harmful to the health of those who use them. In both cases, more than a quarter say these products are not harmful (27% and 26%, respectively), while one in ten or less (8% and 10%, respectively) say they don't know.

Compared to 2017, the proportion who say e-cigarettes are harmful to the health of their users has increased by ten percentage points. The question regarding heated tobacco products has been introduced in the current survey, therefore no comparison is possible.

QC8 In recent years e-cigarettes and heated tobacco products have been increasingly marketed in Europe. Do you think that they are harmful or not to the health of those who use them? (% - EU27 + UK)



Base: All respondents, N= 28,300

There are differences across countries in the respondents' opinions concerning the possible negative impact of e-cigarettes and heated tobacco products on their users' health. A majority in 25 countries think that e-cigarettes are harmful to the health of those who use them, with more than three quarters saying this in 12 countries. Close to nine in ten or more think this in the Netherlands (94%), and Estonia and Finland (both 89%). At the other end of the scale, Romania (36%), Italy (38%) and Hungary (46%) are the only countries where only a minority say e-cigarettes are harmful. More than two in ten in Bulgaria (22%) and 19% in Malta say they don't know.

Very similar patterns can be observed when it comes to heated tobacco products. Once again, a majority in 25 countries believe these products are harmful to the health of their users. In addition, similarly to the results for e-cigarettes, proportions range from more than nine in ten in the Netherlands (95%), Finland (92%) and Estonia (91%), to less than half in Italy (37%), Romania (38%) and Hungary (46%). At least two in ten in Malta (25%), Bulgaria (23%) and France (20%) say they don't know.

In 18 countries, the proportion of those who believe that e-cigarettes are harmful to the health of those who use them has increased since March 2017. The largest increases are observed in the United Kingdom (+29 percentage points), Ireland (+20 pp) and Portugal (+18 pp). At the other end of the spectrum, this share of respondents has decreased by 12 percentage points in Romania, by six percentage points in Cyprus and by three percentage points in Czechia and Hungary.

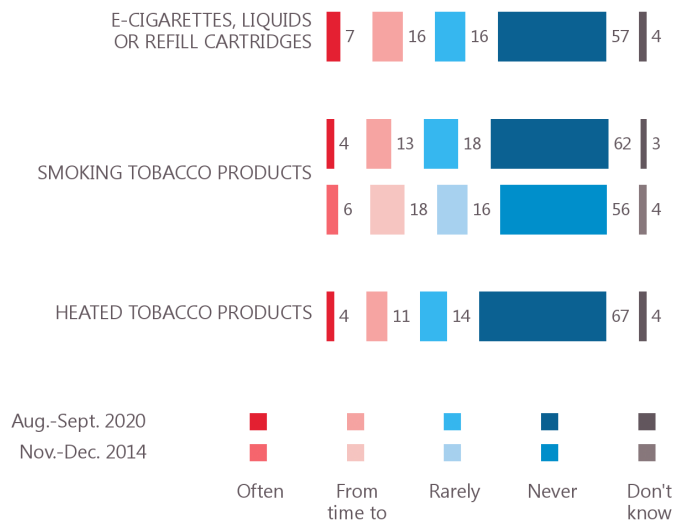
³² QC8.1-2. In recent years e-cigarettes and heated tobacco products have been increasingly marketed in Europe. Do you think that they are harmful or not to the health of those who use them? E-cigarettes; Heated tobacco products. Yes; No; DK.

More than one third have seen advertisements or promotions for smoking tobacco products in the past 12 months

The majority of respondents (62%) have never seen advertising or promotions for smoking tobacco products in the last twelve months, while more than one third (35%) say they have. Among these respondents, the largest share (18%) say they have only rarely encountered advertising for smoking tobacco products and a further 13% say they have done so from time to time. Less than one in twenty (4%) say they have often seen advertising or promotions.

The proportion of respondents who have seen advertising or promotions for smoking tobacco products in the last twelve months has decreased by five percentage points since this question was last asked in 2014. In particular, the proportions saying they have seen them often (-2 pp) or from time to time (-5 pp) have declined, while the share of respondents who have rarely seen these advertisements has slightly increased (+2 pp).

QC18 In the past 12 months, have you seen advertisements or promotions for the following products in (OUR COUNTRY)? (% - EU27 + UK)



Base: All respondents, N= 28,300

Around four in ten have seen advertisements or promotions for e-cigarettes, liquids or refill cartridges in the past 12 months

The majority of respondents (57%) have never seen advertisements or promotions for e-cigarettes, liquids or refill cartridges in the past 12 months. Conversely, nearly four in ten (39%) have seen such advertisements, with 16% saying they have seen them rarely or from time to time. Only 7% say they have encountered them often.

Although in 2014 and 2017 this question was worded slightly differently and a direct comparison is not possible³³, it can still be observed that the proportion saying they had seen advertisements on electronic cigarettes or similar devices was much higher (44% in 2017 and 49% in 2014).

Close to three in ten have seen advertisements or promotions for heated tobacco products in the past 12 months

Around two thirds (67%) of respondents say they have never seen advertisements or promotions for heated tobacco products in the past 12 months. Close to three in ten (29%) have encountered such advertisements, with 14% saying they have rarely seen them and 11% saying they have seen them from time to time. Only 4% say they have seen advertisements for this type of products often.

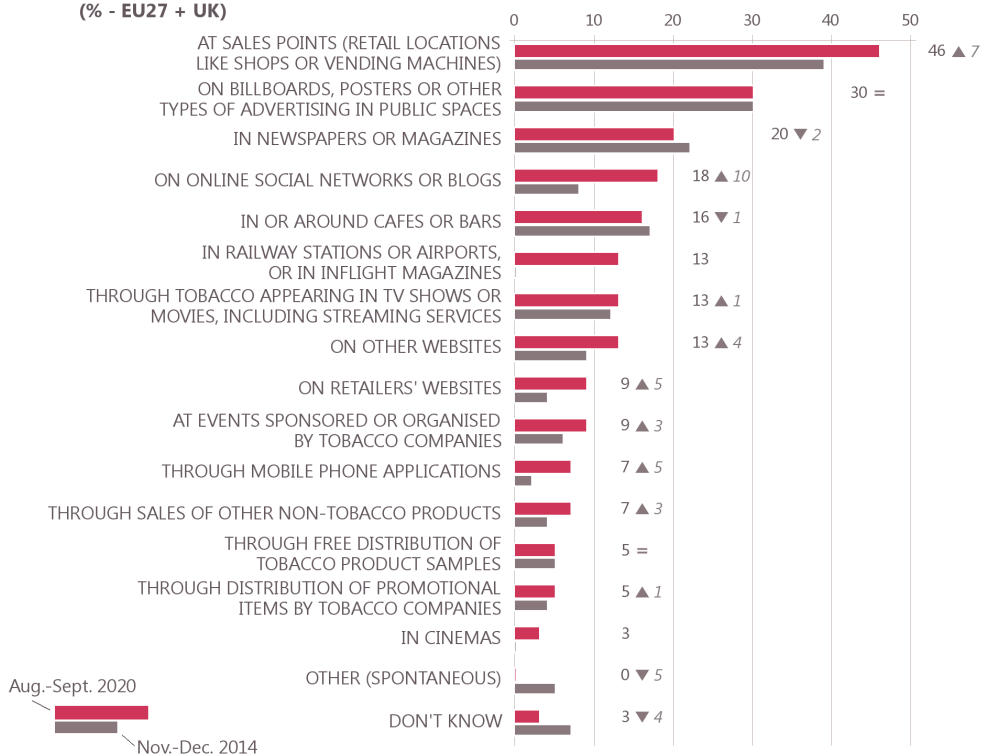
³³ The question asked about 'advertisements or promotions for electronic cigarettes or any similar devices (e.g. e-shisha, e-pipe)'.

Sales points are the most common areas where advertisements or promotions of smoking tobacco products, e-cigarettes and heated tobacco products are viewed

More than four in ten (46%) of respondents who have seen advertisements or promotions for smoking tobacco products in the last 12 months say they have seen them **at sales points (retail locations like shops or vending machines)**³⁴. Three in ten have seen them **on billboards, posters or other types of advertising in public spaces**, while two in ten mention **newspapers or magazines**.

Less than two in ten have seen these ads **on online social networks or blogs** (18%), or **in or around cafes or bars** (16%). More than one in ten say they have encountered them on **websites other than the retailers' websites**, through **tobacco appearing in TV shows or movies, including streaming services**, or in **railway stations or airports, or in inflight magazines** (all 13%).

QC19 Where have you seen, read or heard advertisements or promotions of smoking tobacco products? (MULTIPLE ANSWERS POSSIBLE)
(% - EU27 + UK)



Base: Respondents who have seen, read or heard advertisement of smoking tobacco products, N= 9,803

In 21 countries, **sales points (retail locations like shops or vending machines)**³⁵ are the most-frequently mentioned place where respondents have seen advertisements or promotions for smoking tobacco products. In Cyprus, Estonia and Finland, the most-frequently mentioned answer is **online social networks or blogs**, while **billboards, posters or other types of advertising in public spaces** (in Germany), **newspapers or magazines** (in Slovenia), **in or around cafes or bars** (in Croatia) and **through tobacco appearing in TV shows or movies, including streaming services** (in Latvia) are each the most-frequently mentioned place or source in one country.

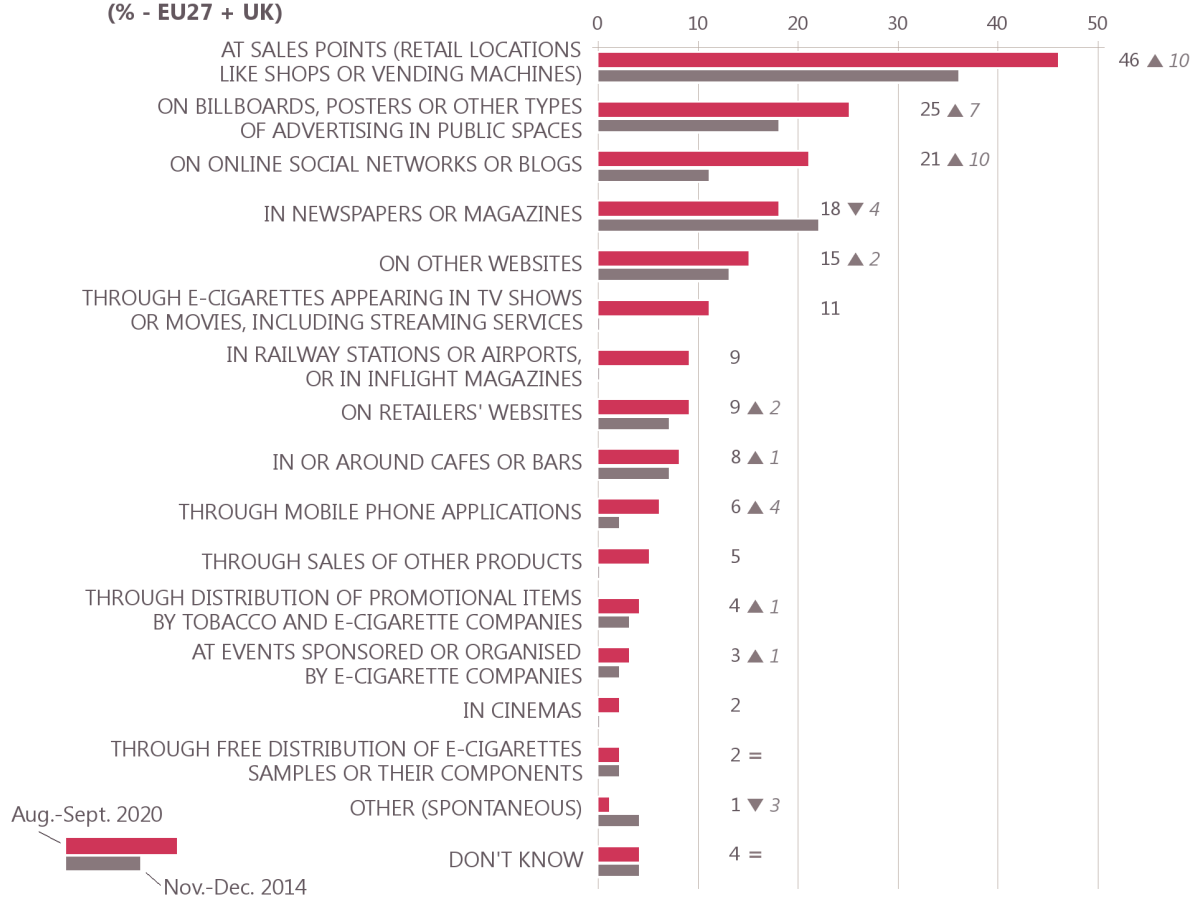
³⁴ QC19. Where have you seen, read or heard advertisements or promotions of smoking tobacco products? In newspapers or magazines; On online social networks or blogs; On retailers' websites; On other websites; Through mobile phone applications; On billboards, posters or other types of advertising in public spaces; At sales points (retail locations like shops or vending machines); In or around cafes or bars; Through tobacco appearing in TV shows or movies, including streaming services; At events sponsored or organised by tobacco companies; Through sales of other non-tobacco products; Through free distribution of tobacco product samples; Through distribution of promotional items by tobacco companies; In railway stations or airports, or in inflight magazines; In cinemas; Other (SPONTANEOUS); Don't know.

³⁵ Results for Cyprus (n=110), France (n=148), Hungary (n=88), Lithuania (n=109) and Malta (n=69) should be interpreted with caution due to the small base size (<150).

Respondents who have seen advertisements or promotions for electronic cigarettes in the last 12 months were asked where they have seen, read or heard advertisements or promotions for electronic cigarettes, e-liquids or refill cartridges³⁶. More than four in ten (46%) of these respondents say they have come across advertisements or promotions **at sales points (retail locations like shops or vending machines)**. More than two in ten mention **billboards, posters or other types of advertising in public spaces** (25%) or **online social networks or blogs** (21%), while 18% cite **newspapers or magazines** and 15% **websites other than retailers' websites**.

Around one in ten have seen them **through e-cigarettes appearing in TV shows or movies, including streaming services** (11%) and nearly one in ten **on retailers' websites**, and **in railway**

QC20a Where have you seen, read or heard advertisements or promotions for electronic cigarettes, e-liquids or refill cartridges? (MULTIPLE ANSWERS POSSIBLE)
(% - EU27 + UK)

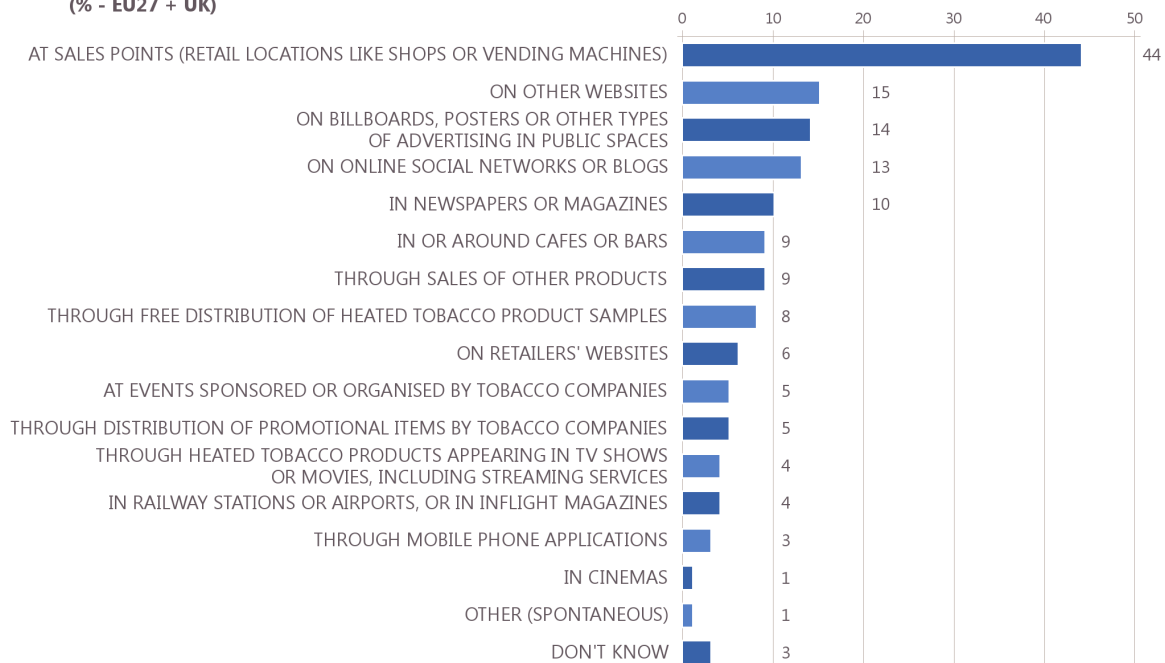


Base: Respondents who have seen, read or heard advertisement for e-cigarettes, N= 3,621

³⁶ QC20a. Where have you seen, read or heard advertisements or promotions for electronic cigarettes, e-liquids or refill cartridges? In newspapers or magazines; On online social networks or blogs; On retailers' websites; On other websites; Through mobile phone applications; On billboards, posters or other types of advertising in public spaces; At sales points (retail locations like shops or vending machines); In or around cafes or bars; Through e-cigarettes appearing in TV shows or movies, including streaming services; At events sponsored or organised by e-cigarette companies; Through sales of other products; Through free distribution of e-cigarettes samples or their components; Through distribution of promotional items by tobacco and e-cigarette companies; In railway stations or airports, or in inflight magazines; In cinemas; Other (SPONTANEOUS); DK.

Respondents who have seen advertisements or promotions for heated tobacco products in the last 12 months were asked where they have seen, read or heard advertisements or promotions for these products³⁷. **At sales points (retail locations like shops or vending machines)** is, by far, the answer that is most frequently mentioned (44%). One in ten or more say they have seen these advertisements or promotions **on websites other than the retailers' websites** (15%), **on billboards, posters or other types of advertising in public spaces** (14%), **on online social networks or blogs** (13%) or **in newspapers or magazines** (10%).

QC20b Where have you seen, read or heard advertisements or promotions for heated tobacco products?
(MULTIPLE ANSWERS POSSIBLE)
(% - EU27 + UK)



Base: Respondents who have seen, read or heard advertisement for heated tobacco products, N= 468

³⁷ QC20b. Where have you seen, read or heard advertisements or promotions for heated tobacco products? In newspapers or magazines; On online social networks or blogs; On retailers' websites; On other websites; Through mobile phone applications; On billboards, posters or other types of advertising in public spaces; At sales points (retail locations like shops or vending machines); In or around cafes or bars; Through e-cigarettes appearing in TV shows or movies, including streaming services; At events sponsored or organised by e-cigarette companies; Through sales of other products; Through free distribution of e-cigarettes samples or their components; Through distribution of promotional items by tobacco and e-cigarette companies; In railway stations or airports, or in inflight magazines; In cinemas; Other (SPONTANEOUS); DK.

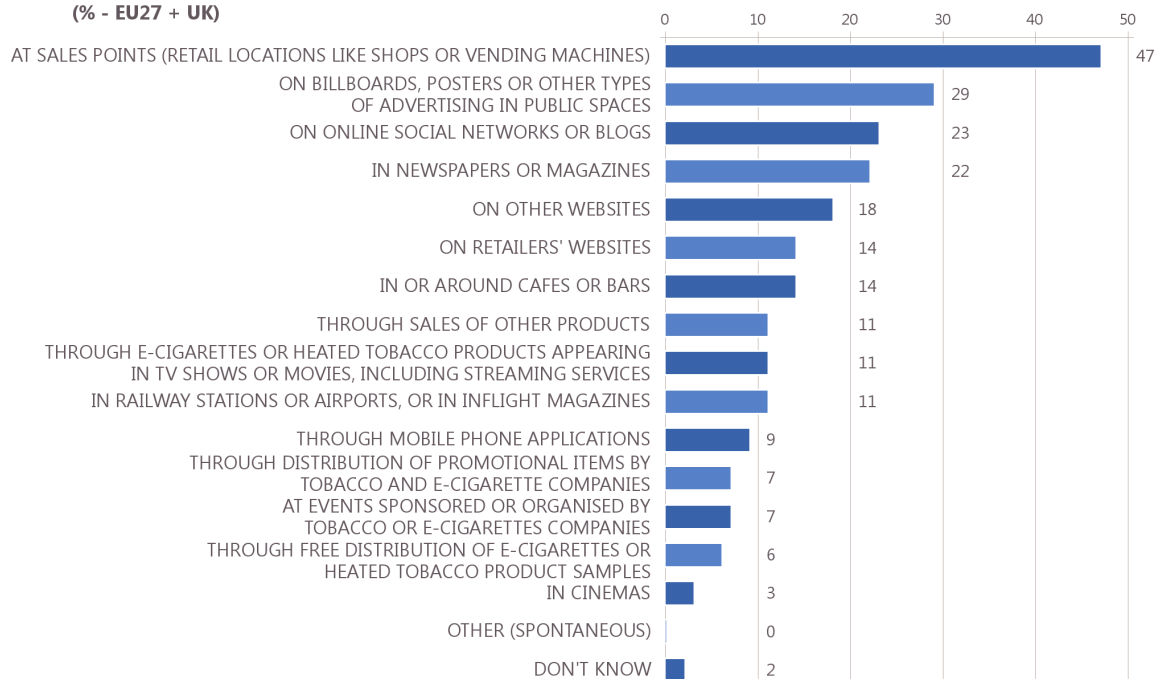
Respondents who have seen advertisements or promotions for electronic cigarettes or for heated tobacco products in the last 12 months were asked where they have seen, read or heard advertisements or promotions for both these types of products³⁸. Once again, the most frequently cited answer is **sales points (retail locations like shops or vending machines)** (47%).

More than one fifth say they have seen these advertisements **on billboards, posters or other types of advertising in public spaces** (29%), **online social networks or blogs** (23%) and **newspapers or magazines** (22%).

Close to two in ten say they have seen these advertisements on **websites other than retailers' websites** (18%), while 14% cite **retailers' websites** or **cafes or bars**.

Slightly more than one in ten mention **e-cigarettes or heated tobacco products appearing in TV shows or movies, including streaming services**, the **sales of other products**, or **railway stations or airports, or inflight magazines** (all 11%).

QC20c Where have you seen, read or heard advertisements or promotions for electronic cigarettes, e-liquids or heated tobacco products? (MULTIPLE ANSWERS POSSIBLE)
(% - EU27 + UK)



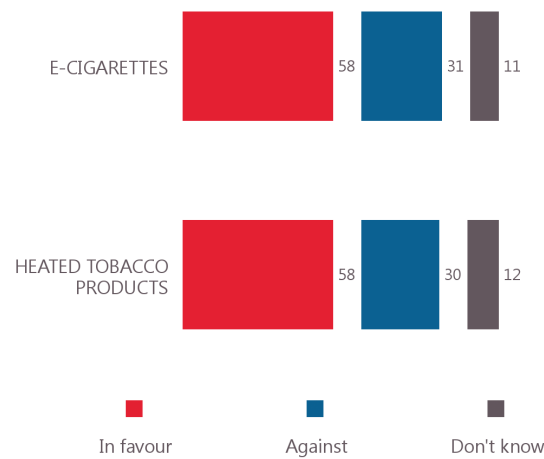
Base: Respondents who have seen, read or heard advertisement for e-cigarettes or heated tobacco products, N= 7,528

³⁸ QC20c. Where have you seen, read or heard advertisements or promotions for electronic cigarettes, e-liquids or heated tobacco products? In newspapers or magazines; On online social networks or blogs; On retailers' websites; On other websites; Through mobile phone applications; On billboards, posters or other types of advertising in public spaces; At sales points (retail locations like shops or vending machines); In or around cafes or bars; Through e-cigarettes or heated tobacco products appearing in TV shows or movies, including streaming services; At events sponsored or organised by tobacco or e-cigarettes companies; Through sales of other products; Through free distribution of e-cigarettes or heated tobacco product samples or their components; Through distribution of promotional items by tobacco and e-cigarette companies; In railway stations or airports, or in inflight magazines; In cinemas; Other (SPONTANEOUS); DK.

Majorities are in favour of keeping e-cigarettes and heated tobacco products out of sight in shops or points of sale

More than half of respondents with no or little experience with smoking, e-cigarettes or heated tobacco products would be in favour of keeping e-cigarettes and heated tobacco products (both 58%) out of sight in shops or points of sale, while 31% and 30% would be against, respectively. More than one in ten say they don't know (11% and 12%, respectively).

QC12b Would you be in favour of or against of keeping the following products out of sight in shops or points of sale?
(% - EU27 + UK)



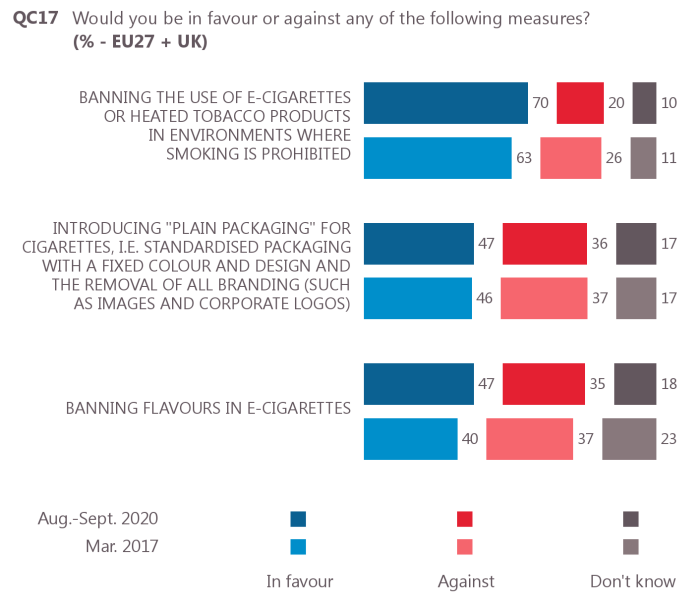
Base: Respondents who never smoked, and never used e-cigarettes or heated tobacco products or have only tried them, N= 15,131

Seven in ten are in favour of banning the use of e-cigarettes or heated tobacco products in environments where smoking is prohibited

Respondents were asked whether they are in favour or against a series of three control policies³⁹. Seven in ten are in favour of **banning the use of e-cigarettes or heated tobacco products in environments where smoking is prohibited**, while only one in five are against this measure. One in ten say they don't know. The proportion of respondents who are in favour of this measure has increased by seven percentage points since 2017.

Relative majorities are in favour of the other two control policies tested in the survey. In particular, 47% are in favour of **banning flavours in e-cigarettes** (vs 35% who are against) and 47% are in favour of **introducing 'plain packaging' for cigarettes, i.e. standardised packaging with a fixed colour and design and the removal of all branding (such as images and corporate logos)** (vs 36% who are against). In both cases, slightly less than two in ten say they don't know (18% and 17%, respectively).

The share of respondents in favour of banning flavours in e-cigarettes has increased by seven percentage points since this question was last asked in 2017, while the proportion of those in favour of introducing 'plain packaging' for cigarettes has remained broadly stable (+1 pp).



Base: All respondents, N= 28,300

In 27 countries, a majority say they are in favour of **banning the use of e-cigarettes or heated tobacco products in environments where smoking is prohibited**. However, across these countries, proportions in favour of this measure vary significantly. The highest shares can be observed in Estonia (87%), Finland (86%) and Sweden (85%), while, at the other end of the scale, 51% in Austria, 52% in Romania and 55% in Bulgaria are in favour of this policy.

In 14 countries, more than half of the respondents are in favour of **banning flavours in e-cigarettes**, with more than two thirds who think this way in Finland (74%), Cyprus (69%), and Estonia, Ireland and Lithuania (all 67%). Conversely, less than four in ten are in favour of this policy in Czechia (29%), Italy (33%), Portugal (36%) and Bulgaria (39%).

In 13 countries, at least half say they are in favour of **introducing 'plain packaging' for cigarettes**. More than six in ten respondents say this in Ireland and the United Kingdom (both 72%), Belgium (66%) and Finland (62%), while those in Portugal (28%), Czechia (32%) and Cyprus (35%) are the least likely to be in favour of this measure.

Overall, respondents in Finland and, to a lesser extent, Estonia are consistently among the most likely to be in favour of each of the three control policies tested in the survey, while the reverse is true for those in Czechia and Bulgaria.

³⁹ QC17. Would you be in favour or against any of the following measures? Introducing "plain packaging" for cigarettes, i.e. standardised packaging with a fixed colour and design and the removal of all branding (such as images and corporate logos); Banning the use of e-cigarettes or heated tobacco products in environments where smoking is prohibited; Banning flavours in e-cigarettes. In favour; Against; DK.

Comparing the results of this question with those in 2017, a number of (at times substantial) shifts in public opinion can be observed in several countries. Respondents in 21 countries are now more likely than they were in 2017 to be in favour of **banning the use of e-cigarettes or heated tobacco products in environments where smoking is prohibited**, with increases by ten percentage points or more in ten countries.

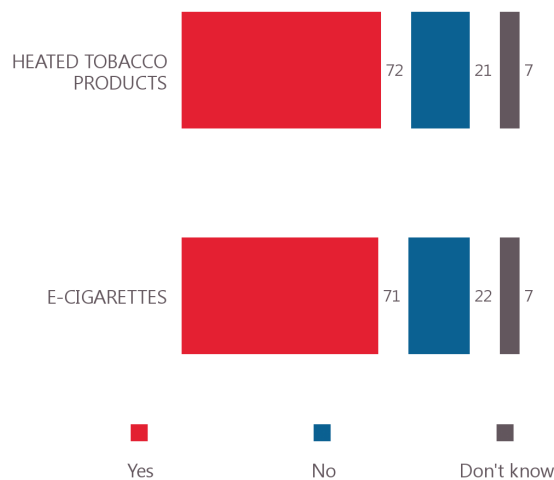
Similarly, the proportion of respondents in favour of **banning flavours in e-cigarettes** has increased in 20 countries, and by at least ten percentage points in 12 countries. Respondents in Sweden (+23 pp), Finland and the Netherlands (both +21 pp) and Estonia (+20 pp) are now much more likely to answer this way.

Patterns are less clear-cut when it comes to **introducing "plain packaging" for cigarettes**. The proportion in favour of this measure has increased in 14 countries, but it has also declined in an almost equal number of countries (13).

Large majorities of those who have no or little experience with e-cigarettes or heated tobacco products think these products should be regulated as strictly as cigarettes

Finally, respondents who have never used, or only tried, e-cigarettes or heated tobacco products were asked whether they think that these products should be regulated as strictly as cigarettes⁴⁰. Large majorities are in favour of regulating more strictly each of these products. Slightly more than seven in ten (72%) say this for heated tobacco products, with around one in five (21%) answering that they do not think these products should be regulated as strictly as cigarettes. A similar proportion (71%) think that e-cigarettes should be regulated as strictly as standard cigarettes, with more than one in five (22%) saying the opposite.

QC11c Do you think that these products should be regulated as strictly as cigarettes?
(% - EU27 + UK)



Base: Respondents who never used or only tried e-cigarettes or heated tobacco products, N= 25,882

⁴⁰ QC11c. Do you think that these products should be regulated as strictly as cigarettes? E-cigarettes; Heated tobacco products. Yes; No; DK.

CONCLUSION

Across the EU and the United Kingdom, less than a quarter of the respondents are smokers, a slight decrease compared to the previous survey in 2017, thus continuing the downward trend that has characterised Europeans' consumption of traditional tobacco products for several years. Nevertheless, in line with previous Eurobarometer surveys, significant geographic and socio-demographic differences still persist. Respondents in Southern and Eastern European countries are generally more likely to be smokers, as are men, those in the central age cohorts (25-54), the unemployed and manual workers, and those who have financial difficulties. Conversely, the proportion of young smokers has substantially declined since 2017.

Overall, almost nine in ten of those who consume a tobacco or related product, do so on a daily basis. Boxed cigarettes remain the most popular choice among smokers, consumed by nearly eight in ten smokers monthly and by close to seven in ten daily, while a consistent proportion of smokers smoke hand-rolled cigarettes. When it comes to consumption of other products, nearly one in five have at least tried a water pipe and less than one in ten say this for oral, chewing and nasal tobacco. Around one in sixteen have used products containing cannabis in the last 12 months, with this share rising to 15% among the youngest respondents. Lastly, one in seven use e-cigarettes, a proportion that has remained stable since 2017, and around one in sixteen use heated tobacco products, with majorities consuming these products daily.

Among those who smoke cigarettes, the average consumption is more than 14 cigarettes per day (even though this figure greatly varies across countries) and the average age of starting smoking currently stands at just below 18 years old. A majority of smokers have, at some point, attempted to stop smoking, and three quarters of current and ex-smokers have done so without seeking any assistance. In this respect, large shares of those with no or little experience with e-cigarettes think e-cigarettes or heated tobacco products do not help tobacco smokers to quit the habit.

However, stopping or reducing tobacco consumption is the first most frequently mentioned reason by users for taking up e-cigarettes and the second for starting using heated tobacco products (the first being the belief that they are less harmful than smoking tobacco). Three in ten smokers or ex-smokers who use or have used e-cigarettes or heated tobacco products say these products helped them to stop smoking tobacco completely, and more than a quarter say they reduced consumption but did not stop. Against this backdrop, it can be observed that large majorities of e-cigarette and heated tobacco product users are 'dual users', i.e. their use of these products comes on top of their traditional tobacco product consumption. A consistent share (27%) of current users of e-cigarette or heated tobacco products have attempted to quit, with, once again, a large majority doing so without seeking any assistance.

A lower number of respondents have recently seen smoking occurring indoors in drinking establishments, like bars, and eating establishments, like restaurants⁴¹. However, substantial country differences arise, with conspicuous proportions reporting people smoking inside in Croatia (only for bars), Cyprus and Slovakia. Very large decreases can be observed in these shares of respondents since 2017, particularly in Greece, Czechia and Austria, while there have been increases in a few countries, especially in Spain. Much higher proportions have recently seen people vaping or using heated tobacco products indoors. Nearly three in ten say this for bars, close to one fifth for restaurants and one quarter for other public spaces where people normally do not smoke (e.g. shopping malls, airports, concert halls). Around three in ten say the last time they visited outdoor spaces intended for use by children or adolescents in the last six months people were smoking tobacco products.

⁴¹ In 2020, the operation of eating and drinking establishments in various MSs might have been affected by the COVID-19 restrictions during the six months preceding the survey.

Close to two thirds of respondents think both vaping and heated tobacco products are harmful to the health of those who use them, which represents an increase by ten percentage points since 2017 in the case of e-cigarettes. In line with this finding, around seven in ten of those who have never used, or only tried, these products are in favour of regulating them as strictly as cigarettes. Moreover, a large majority of those with no or little experience with tobacco, heated tobacco products and e-cigarettes are in favour of keeping e-cigarettes and heated tobacco products out of sight in shops. Similarly, seven in ten among all respondents favour a ban on the use of these products in environments where smoking is prohibited. Relative majorities are in favour of the other two control policies tested in the survey: the ban of flavours in e-cigarettes and the introduction of 'plain packaging' for cigarettes, i.e. standardised packaging with a fixed colour and design and the removal of all branding (such as images and corporate logos).

Overall, the findings of this survey highlight that smoking prevalence continues its downward trend, particularly among young people, albeit in presence of persistently high levels in certain geographical areas and socio-demographic groups. However, the trend becomes more complex if one considers use of any tobacco or related product: e-cigarettes and heated tobacco products are more prevalent among young people and the countries where the prevalence of traditional tobacco products is high. Since 2017, there have not been substantial changes when it comes to habits among smokers, with the majority still using these products daily, the average starting age still below 18 years old and the average number of cigarettes smoked per day still at around 14. When it comes to emerging devices, such as e-cigarettes and heated tobacco products, smaller, yet consistent, proportions use these products. Although some users seem to have replaced traditional tobacco products by e-cigarettes/heated tobacco, large majorities still use these products on top of their consumption of traditional tobacco products. Lastly, there is a widespread perception among the public of their harmful health consequences, as well as endorsement for introduction of stricter regulations and control policies.

TECHNICAL SPECIFICATIONS

Between the 3rd August and 15th September 2020, Kantar carried out the wave 93.2 of the EUROBAROMETER survey, at the request of the European Commission, Directorate-General for Communication, "Media monitoring and Eurobarometer" Unit.

The wave 93.2 covers the population of the respective nationalities of the European Union Member States, resident in each of the 27 Member States and aged 15 years and over.

The basic sample design applied in all States is a multi-stage, random (probability) one. In each country, a number of sampling points was drawn with probability proportional to population size (for a total coverage of the country) and to population density.

In order to do so, the sampling points were drawn systematically from each of the "administrative regional units", after stratification by individual unit and type of area. They thus represent the whole territory of the countries surveyed according to the EUROSTAT NUTS II (or equivalent) and according to the distribution of the resident population of the respective nationalities in terms of metropolitan, urban and rural areas.

In each of the selected sampling points, a starting address was drawn, at random. Further addresses (every Nth address) were selected by standard "random route" procedures, from the initial address. In each household, the respondent was drawn, at random (following the "closest birthday rule"). If no one answered the interviewer in a household, or if the respondent selected was not available (not present or busy), the interviewer revisited the same household up to three additional times (four contact attempts in total). Interviewers never indicate that the survey is conducted on behalf of the European Commission beforehand; they may give this information once the survey is completed, upon request.

The recruitment phase was slightly different in the Netherlands and Denmark. In these countries, a sample of addresses within each areal sampling point (1km² grid) were selected from the address or population register. The selection of addresses was done in a random manner. Households were then contacted by telephone and recruited to take part in the survey.

August – September 2020

	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORK DATES		POPULATION 15+	PROPORTION EU27
BE	Belgium	Kantar Belgium (Kantar TNS)	981	13/08/2020	15/09/2020	9.188.369	2,45%
BG	Bulgaria	Kantar TNS BBSS	1.057	03/08/2020	24/08/2020	5.995.194	1,60%
CZ	Czechia	Kantar CZ	1.027	04/08/2020	24/08/2020	8.956.740	2,39%
DK	Denmark	Kantar Gallup	1.022	07/08/2020	03/09/2020	4.848.611	1,29%
DE	Germany	Kantar Deutschland	1.527	05/08/2020	07/09/2020	71.728.398	19,10%
EE	Estonia	Kantar Emor	1.104	17/08/2020	31/08/2020	1.073.224	0,29%
IE	Ireland	Kantar Belgium	1.239	27/08/2020	15/09/2020	3.896.482	1,04%
EL	Greece	Taylor Nelson Sofres Market Research	1.016	07/08/2020	30/08/2020	9.187.524	2,45%
ES	Spain	TNS Investigación de Mercados y Opinión	1.049	13/08/2020	15/09/2020	40.006.943	10,65%
FR	France	Kantar Public France	1.001	03/08/2020	31/08/2020	52.732.499	14,04%
HR	Croatia	Hendal	1.019	05/08/2020	24/08/2020	3.488.460	0,93%
IT	Italy	Kantar Italia	1.021	04/08/2020	26/08/2020	52.397.331	13,95%
CY	Rep. Of Cyprus	CYMAR Market Research	505	03/08/2020	01/09/2020	734.695	0,20%
LV	Latvia	Kantar TNS Latvia	1.024	06/08/2020	01/09/2020	1.568.124	0,42%
LT	Lithuania	TNS LT	1.008	10/08/2020	03/09/2020	2.300.257	0,61%
LU	Luxembourg	Kantar Belgium	608	20/08/2020	15/09/2020	503.275	0,13%
HU	Hungary	Kantar Hoffmann	1.058	08/08/2020	24/08/2020	8.351.017	2,22%
MT	Malta	MISCO International	502	05/08/2020	31/08/2020	426.055	0,11%
NL	Netherlands	TNS NIPO	1.086	05/08/2020	31/08/2020	14.165.638	3,77%
AT	Austria	Das Österreichische Gallup Institut	1.008	07/08/2020	23/08/2020	7.580.083	2,02%
PL	Poland	Kantar Polska	1.057	03/08/2020	25/08/2020	32.139.021	8,56%
PT	Portugal	Markttest – Marketing, Organização e Formação	1.061	05/08/2020	30/08/2020	8.869.051	2,36%
RO	Romania	Centrul Pentru Studierea Opiniei si Pietei (CSOP)	1.103	03/08/2020	30/08/2020	16.372.216	4,36%
SI	Slovenia	Mediana DOO	1.011	04/08/2020	19/08/2020	1.767.202	0,47%
SK	Slovakia	Kantar Slovakia	1.046	06/08/2020	23/08/2020	4.592.379	1,22%
FI	Finland	Kantar TNS Oy	1.099	20/08/2020	03/09/2020	4.488.064	1,20%
SE	Sweden	Kantar Sifo	998	18/08/2020	10/09/2020	8.149.850	1,90%
	TOTAL EU27		27.237	03/08/2020	15/09/2020	375.506.702	100%*
UK	United Kingdom	Kantar UK Limited	1.051	24/08/2020	19/09/2020	53.082.345	
	TOTAL		28.288	03/08/2020	19/09/2020	428.589.047	

* It should be noted that the total percentage shown in this table may exceed 100% due to rounding

** Recruitments in Luxembourg, Ireland, Belgium and Spain are carried out by Ronin International, Kantar Belgium, Kantar Spain, Infas and GDCC. Non-probabilistic sample in Luxembourg and Ireland was randomly drawn from Kantar's LifePoints panel.

August – September 2020

	COUNTRIES	N° OF CAPI INTERVIEWS	N° OF CAWI INTERVIEWS	TOTAL N° INTERVIEWS
BE	Belgium	388	593	981
BG	Bulgaria	1.057		1.057
CZ	Czechia	1.027		1.027
DK	Denmark	936	86	1.022
DE	Germany	1.527		1.527
EE	Estonia		1104	1.104
IE	Ireland		1239	1.239
EL	Greece	1.016		1.016
ES	Spain	302	747	1.049
FR	France	1.001		1.001
HR	Croatia	1.019		1.019
IT	Italy	1.021		1.021
CY	Rep. Of Cyprus	505		505
LV	Latvia	1.024		1.024
LT	Lithuania	1.008		1.008
LU	Luxembourg		608	608
HU	Hungary	1.058		1.058
MT	Malta	502		502
NL	Netherlands	754	332	1.086
AT	Austria	1.008		1.008
PL	Poland	1.057		1.057
PT	Portugal	1.061		1.061
RO	Romania	1.103		1.103
SI	Slovenia	1.011		1.011
SK	Slovakia	1.046		1.046
FI	Finland		1.099	1.099
SE	Sweden		998	998
	TOTAL EU27	20.431	6.806	27.237
UK	United Kingdom		1.051	1.051
	TOTAL	20.431	7.857	28.288

CAPI : Computer-Assisted Personal interviewing

CAWI : Computer-Assisted Web interviewing

Consequences of the coronavirus pandemic on fieldwork

Where feasible, interviews were conducted face-to-face in people's homes or on their doorstep and in the appropriate national language. In all countries where face-to-face interviewing was feasible CAPI (Computer Assisted Personal Interviewing) was used. At the start of the fieldwork it was intended to have interviewers to offer respondents the possibility to answer the question online, if they were reluctant to do it face-to-face. Eventually this option was not needed (except in Denmark and Netherlands), as the number of required interviews could be reached through regular face-to-face interviewing. For all interviews conducted face to face, hygiene and physical distancing measures have always been respected in line with government regulations, and whenever possible, interviews were conducted outside homes, on doorsteps, to remain in open air and maintain social distance.

In **Netherlands** and **Denmark**, face-to-face interviewing was feasible, but it was not possible to reach the target number of interviews within the fieldwork period. Therefore, to hit the target number of interviews within the fieldwork period an online survey was offered to those who refused the face-to-face option at the telephone recruitment stage. As a result, data collection was made through interviews via CAPI and CAWI modes.

Due to the coronavirus pandemic, **face-to-face interviews were not possible in Belgium, Estonia, Finland, Ireland, Luxembourg, Spain, Sweden and the UK**. In these countries, interviews were conducted online with Computer-Assisted Web Interviewing (CAWI) technique. However, at a later stage during the fieldwork, face-to-face interviews became feasible in **Belgium** and **Spain**, where 388 and 302 interviews were conducted with this methodology.

The online design in each country differed based on what was feasible within the fieldwork period. In all but Luxembourg the online sample was based on a probabilistic sample design: in other terms, respondents were recruited in a probabilistic random manner, ensuring that all individuals in this country have an equal chance to be interviewed.

In **Belgium, Ireland and Spain**, respondents were recruited by telephone via a probabilistic dual frame sample of telephone numbers, drawn from national telephone numbering plan.

In **Luxembourg**, the same approach was initiated. However, the response rates were not sufficiently large to achieve the target sample size in the fieldwork period, so this sample was supplemented with a non-probabilistic sample randomly drawn from Kantar's LifePoints panel. In total 155 interviews were conducted via the probabilistic sample and 453 via the LifePoints panel in Luxembourg. The sample for Ireland was also supplemented from the same panel but to a lesser extent (349 interviews).

In **Estonia, Finland, Sweden and the UK** only people randomly selected through a probabilistically drawn sample were interviewed online.

In Estonia and Finland, the respondents are recruited through a telephone survey. In Estonia a dual frame random sample is drawn from the national telephone numbering plan whilst in Finland and Sweden a random sample is drawn from the telephone register.

In UK, recruitment of respondents was made either via a face-to-face CAPI mode of data collection based on a clustered multistage random sample of addresses or via a postal invite to an online survey using a completely un-clustered random sample of addresses.

Margins of error

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

Statistical Margins due to the sampling process
(at the 95% level of confidence)

various sample sizes are in rows *various observed results are in columns*

	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	
N=50	6.0	8.3	9.9	11.1	12.0	12.7	13.2	13.6	13.8	13.9	N=50
N=500	1.9	2.6	3.1	3.5	3.8	4.0	4.2	4.3	4.4	4.4	N=500
N=1000	1.4	1.9	2.2	2.5	2.7	2.8	3.0	3.0	3.1	3.1	N=1000
N=1500	1.1	1.5	1.8	2.0	2.2	2.3	2.4	2.5	2.5	2.5	N=1500
N=2000	1.0	1.3	1.6	1.8	1.9	2.0	2.1	2.1	2.2	2.2	N=2000
N=3000	0.8	1.1	1.3	1.4	1.5	1.6	1.7	1.8	1.8	1.8	N=3000
N=4000	0.7	0.9	1.1	1.2	1.3	1.4	1.5	1.5	1.5	1.5	N=4000
N=5000	0.6	0.8	1.0	1.1	1.2	1.3	1.3	1.4	1.4	1.4	N=5000
N=6000	0.6	0.8	0.9	1.0	1.1	1.2	1.2	1.2	1.3	1.3	N=6000
N=7000	0.5	0.7	0.8	0.9	1.0	1.1	1.1	1.1	1.2	1.2	N=7000
N=7500	0.5	0.7	0.8	0.9	1.0	1.0	1.1	1.1	1.1	1.1	N=7500
N=8000	0.5	0.7	0.8	0.9	0.9	1.0	1.0	1.1	1.1	1.1	N=8000
N=9000	0.5	0.6	0.7	0.8	0.9	0.9	1.0	1.0	1.0	1.0	N=9000
N=10000	0.4	0.6	0.7	0.8	0.8	0.9	0.9	1.0	1.0	1.0	N=10000
N=11000	0.4	0.6	0.7	0.7	0.8	0.9	0.9	0.9	0.9	0.9	N=11000
N=12000	0.4	0.5	0.6	0.7	0.8	0.8	0.9	0.9	0.9	0.9	N=12000
N=13000	0.4	0.5	0.6	0.7	0.7	0.8	0.8	0.8	0.9	0.9	N=13000
N=14000	0.4	0.5	0.6	0.7	0.7	0.8	0.8	0.8	0.8	0.8	N=14000
N=15000	0.3	0.5	0.6	0.6	0.7	0.7	0.8	0.8	0.8	0.8	N=15000
	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	

