

Special Eurobarometer 458

Summary

Attitudes of Europeans towards tobacco and electronic cigarettes

Fieldwork
March 2017
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Survey requested by the European Commission,
Directorate-General for the 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 458 – Wave EB87.1 – TNS opinion & social

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Directorate-General for Health and Food safety (DG SANTE)

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(DG COMM "Strategic Communication" 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 year. Around 50% of smokers die prematurely, resulting in the loss of an average of 14 years of life. 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 through a range of measures, including regulating tobacco products, restricting the advertising of tobacco products, implementing smoke-free environments and running anti-smoking campaigns. Some of the most recent 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, as well as a ban on cigarettes and roll-your-own tobacco with characterising flavours.

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 from the harmful effects of tobacco consumption, as well as assisting smokers to give up, and discouraging 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 2014. 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 and advertising of electronic cigarettes (e-cigarettes).

The current survey explores:

- Prevalence in the EU – both of tobacco and of e-cigarettes;
- The age Europeans start using tobacco, as well as the frequency of use;
- The type of tobacco products consumed;
- Issues related to starting and stopping smoking;
- Factors that influence the choice of cigarettes or e-cigarettes;
- Exposure to tobacco smoke at work and in public spaces;
- Exposure to advertising for e-cigarettes;
- Perceptions of harm from e-cigarettes;
- Attitudes to tobacco and e-cigarette control policies.

Where possible, the results from the present survey are compared with those from previous surveys, and in particular with the most recent survey from 2014.

This survey was carried out by the TNS opinion & social network in the 28 Member States of the European Union between the 18th and the 27th of March 2017¹. 27,901 respondents from different social and demographic groups were interviewed face-to-face at home in their mother tongue on behalf of the Directorate-General for Health and Food safety (DG SANTE). The methodology used is that of Eurobarometer surveys as carried out by the Directorate-General for Communication (“Strategic communication” Unit)². A technical note on the manner in which interviews were conducted by the Institutes within the TNS opinion & social network is appended as an annex to this report. Also included are the interview methods and confidence intervals³.

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

Belgium	BE	Lithuania	LT
Bulgaria	BG	Luxembourg	LU
Czech Republic	CZ	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
Latvia	LV	United Kingdom	UK
European Union – weighted average for the 28 Member States			EU28

* Cyprus as a whole is one of the 28 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 EU28 average.

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

¹ It is important to note that this survey was conducted in early summer while the previous edition, Special Eurobarometer 409, was carried out in early winter.

² http://ec.europa.eu/public_opinion/index_en.htm

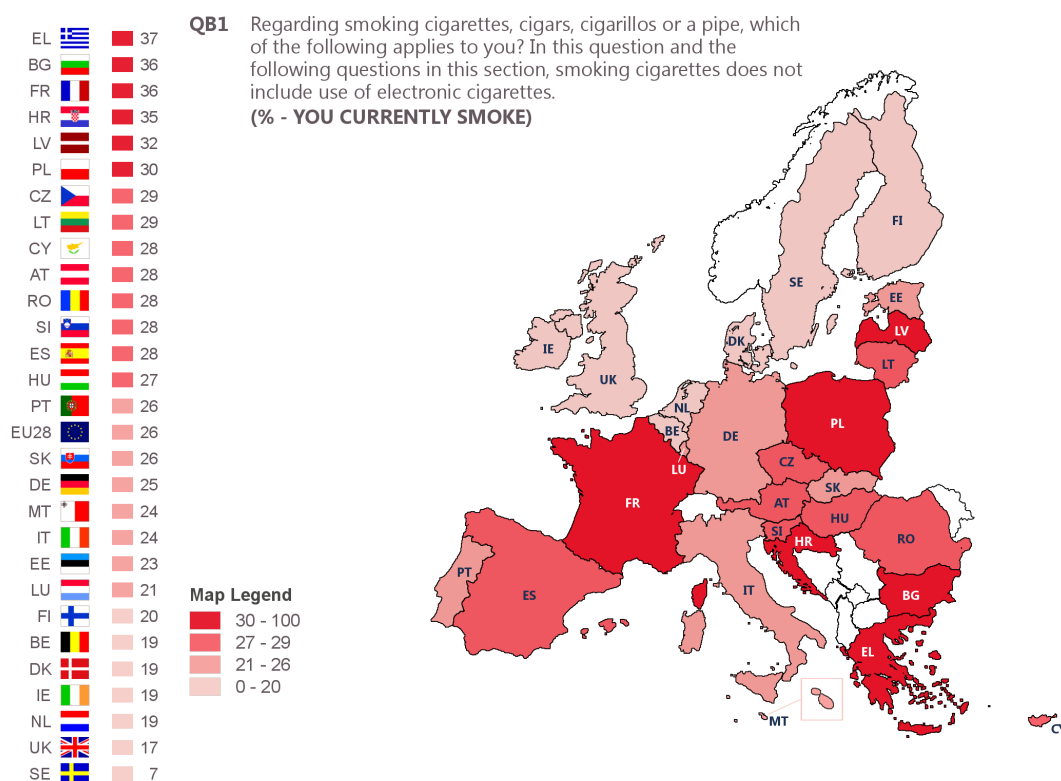
³ The results tables are included in the annex. It should be noted that the total of the percentages in the tables of this report may exceed 100% when the respondent has the possibility of giving several answers to the question.

I. TOBACCO CONSUMPTION IN THE EUROPEAN UNION

- The proportion of smokers in the EU is stable since 2014 -

Respondents were asked if they currently smoke boxed cigarettes, cigars, cigarillos or a pipe.⁴ As in the previous survey of December 2014, over a quarter (26%) of those polled give this response. A further one in five (20%) say they used to smoke, but have stopped. The majority of respondents (53%) have never smoked.

There are significant and persistent differences in the prevalence of smoking, with the highest rates observed in Greece (37%), Bulgaria (36%), France (36%) and Croatia (35%) with over a third saying that they currently smoke. The lowest proportions are found in Sweden (7%) and the United Kingdom (17%).



Base: all respondents, N=27,901

- The proportion of smokers has declined in most countries since 2006, but has remained overall stable since 2014 -

Between 2006 and 2017 there has been a six percentage point decline in the proportion of those who smoke. In 21 of the 28 Member States, the proportion of respondents who smoke has declined over this period, but to a varying extent. In the United Kingdom, the proportion of smokers has decreased by 16 percentage points, and in Denmark by 13 percentage points, while in Malta the proportion has remained broadly stable (-1pp).

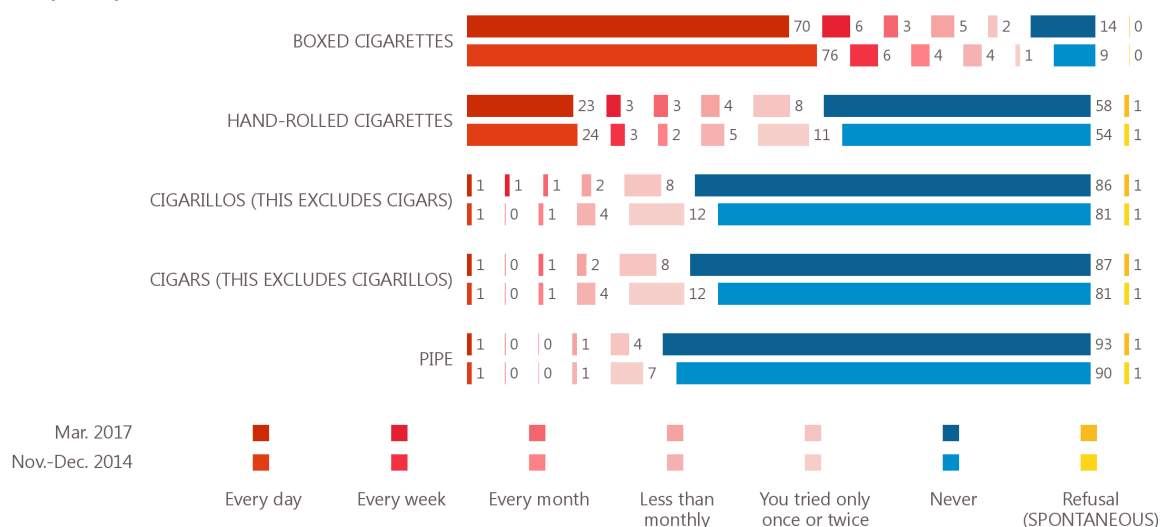
In terms of the changes among socio-demographic groups since 2014, one of the most prominent shifts can be observed for respondents aged 15-24 (+ 4 percentage points, from 25% to 29%), who are slightly more likely to say that they smoke than before.

⁴ QB1: Regarding smoking cigarettes, cigars, cigarillos or a pipe, which of the following applies to you? In this question and the following questions in this section, smoking cigarettes does not include use of electronic cigarettes. You currently smoke; You used to smoke but you have stopped; You have never smoked; DK.

- Over nine in ten of smokers consume tobacco products daily, with boxed cigarettes the most popular choice -

Among those who currently smoke, over nine in ten (91%) smokers consume tobacco products daily. A large majority of smokers are regular users (at least monthly) of boxed cigarettes, with nearly eight in ten (79%) of those polled giving this response. All other tobacco products are consumed (at least monthly) by fewer smokers with less than three in ten (29%) smoking hand-rolled cigarettes, and a small proportion smoking cigarillos (3%), cigars (2%), or pipes (1%).

QB4a How often do you use the following tobacco products?
(% - EU)



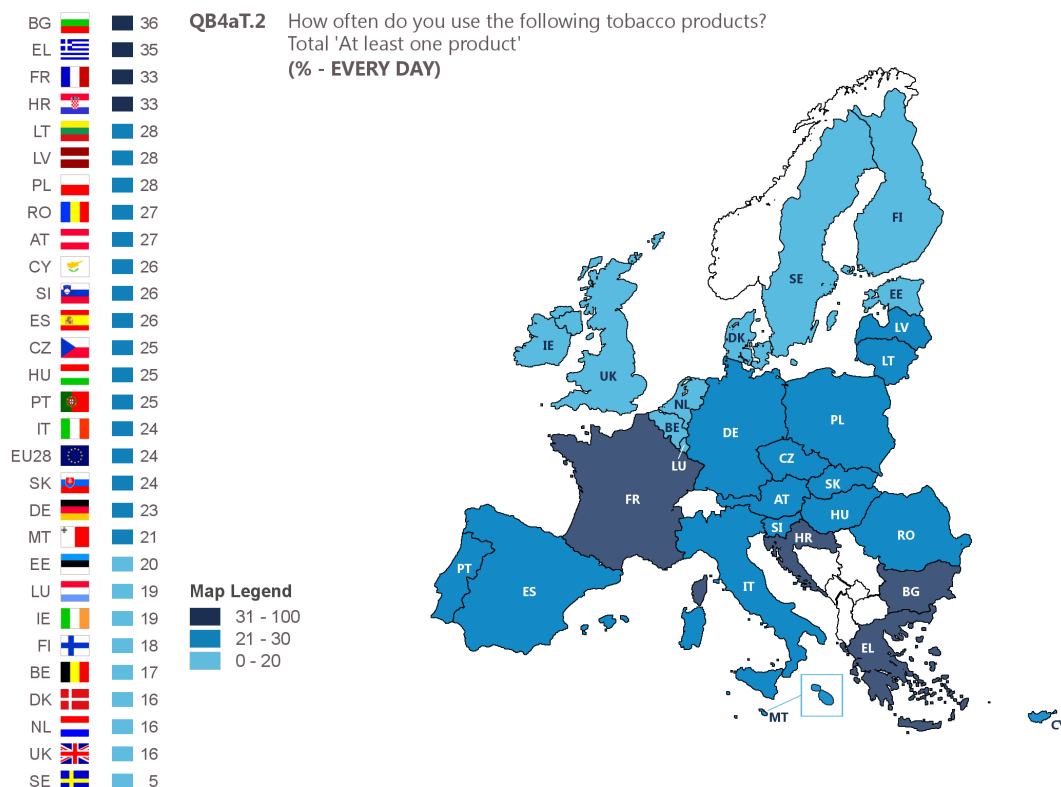
Base: respondents who smoke, N=7,444

Among regular users of tobacco products, boxed cigarettes are the most popular tobacco product in each of the 28 Member States, although their popularity varies. In Bulgaria (96%) and Lithuania (95%) almost all smokers consume boxed cigarettes, compared with less than six in ten (59%) of those polled in Hungary. In all but one country, the proportion of smokers who smoke boxed cigarettes regularly has decreased since December 2014, the exception being Portugal, which has remained stable (+1pp).

In most countries, a large majority of smokers consume at least one tobacco product daily. In Bulgaria (98%), Portugal (97%), Italy (96%) and Greece (95%) almost all smokers give this answer. In all but one country, at least eight in ten (80%) of smokers consume tobacco products daily. The exception is Sweden, where only just over half (52%) give this response.

In most cases, there have been no dramatic changes since 2014. The proportion of those who smoke boxed cigarettes has fallen in 24 Member States, but aside from Sweden (down 20 percentage points) and Latvia (down 11 percentage points) the difference remains in single figures.

Overall, 24% of people in the EU can be considered daily smokers. This proportion rises to at least a third in some southern European countries (36% in Bulgaria, 35% in Greece and 33% in Croatia), as well as in France (33%). Conversely, respondents in most northern European countries are among the least likely to smoke tobacco products daily. This is particularly the case in Sweden (5%), but also in the United Kingdom, Netherlands, Denmark (all 16%), Belgium (17%) and Finland (18%).



Base: all respondents, N=27,901

When comparing these results to those collected in 2014⁵, some modest changes in behaviour can be observed. While the overall proportion of daily smokers has remained the same, proportions have increased in Slovakia (+5 percentage points), France, Lithuania, and Italy (all +4 percentage points). Decreases of a similar magnitude have taken place in Belgium (-6 percentage points), Cyprus, Denmark (both -5 percentage points), the United Kingdom and the Netherlands (both -4 percentage points).

⁵ It should be noted that in this wave of the study, respondents who initially said that they had never smoked, and then later said that they smoke one of the products from time to time (in QB2b), were also asked QB4a. This accounts for why the sum of the daily and occasional smokers does not always perfectly sum to the smoking prevalence measured in QB1.

- On average, current daily smokers smoke around 14 cigarettes per day -

When considering only those who smoke tobacco daily, the average daily consumption is 14.1 cigarettes per day. Just over four in ten daily tobacco smokers (43%) smoke ten or fewer cigarettes a day, while 55% smoke more than that amount. There have been few changes in these results since 2014.

The average number of cigarettes smoked per day by daily smokers varies across countries⁶. The highest rates of smoking can be found in Cyprus, where the average smoker has 18.2 cigarettes daily, and in Austria, where the average is 18.9. In all countries, the average number of cigarettes smoked exceeds 10. In most countries, change has been minimal since the last survey. Slovakia stands out for a significant increase in the average number of cigarettes smoked daily, up by 2.8 since December 2014. In the United Kingdom, the average number has declined by 2.3, and in Spain by 2.2.

QB5a On average, how many cigarettes do you smoke each day?

(AVERAGE + EVOLUTION COMPARED WITH EB82.4 NOV.-DEC. 2014)

EU28		14.1	▼ 0.6	EU28		14.1	▼ 0.6
CY		18.9	▼ 0.6	IE		13.8	▼ 0.7
AT		18.4	▼ 1.7	BE		13.8	▼ 0.8
HR		17.9	▲ 0.8	DK		13.7	▼ 0.1
EL		17.8	▼ 1.8	IT		13.6	▲ 0.4
MT		17.0	▲ 1.4	EE		13.2	▲ 1.3
HU		16.3	▼ 0.2	PT		13.2	▼ 1.9
SK		15.9	▲ 2.8	FI		12.7	▼ 1.2
PL		15.9	▲ 0.2	NL		12.6	▲ 0.9
BG		15.9	▲ 0.1	FR		12.6	▼ 0.6
RO		15.7	▲ 1.2	UK		12.4	▼ 2.3
SI		15.7	▼ 1.6	LT		12.2	▼ 0.4
CZ		15.4	▲ 0.6	ES		11.7	▼ 2.2
DE		15.2	▼ 0.4	LV		11.5	▼ 1.3
LU		14.8	▲ 1.6	SE		10.4	▼ 1.3

Base: respondents who smoke cigarettes daily, N=6,741⁷

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 14.9 among those aged 55 or over.

Respondents who started smoking at an earlier age are much more likely to have a higher daily consumption of cigarettes than those who started later in life. 58% of those who started before they were 15 and 56% of those who started between 15 and 17 smoke more than 10 cigarettes a day. This compares to just 43% of those who started after the age of 25.

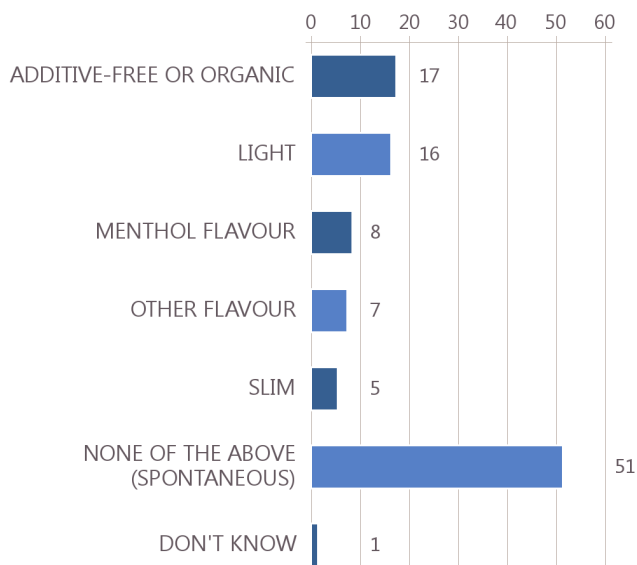
Respondents who started before the age of 18 are also more likely to smoke more than 20 cigarettes a day.

⁷ The following countries have a base size of less than 150 and should therefore be interpreted with caution: SE, LU, MT, CY

- Around half of regular smokers smoke cigarettes with special characteristics -

Just under half (48%) of respondents who smoke cigarettes at least on a monthly basis smoke cigarettes with special characteristics. The most popular choices are additive-free or organic cigarettes (17%) and light cigarettes (16%). Menthol flavour (8%), other flavours (7%) and slim (5%) cigarettes are smoked by less than one in ten of those polled.

QB6a Do you smoke cigarettes with any of the following characteristics on a monthly basis?
(MULTIPLE ANSWERS POSSIBLE)
(% - EU)



Base: respondents who smoke cigarettes at least on a monthly basis, N=7,059

There are significant differences at the country level in the popularity of varieties of cigarette⁸. Additive-free or organic cigarettes are the most popular choice in 12 Member States, although the proportion of regular smokers who consume these cigarettes varies from just 1-2% in Denmark, UK and Ireland to nearly six in ten (58%) respondents in the Czech Republic.

In most Member States, at least one in ten (10%) of those who smoke on a regular basis consume light cigarettes. In Ireland, the proportion who smoke light cigarettes is only just over one in ten (14%). On the other hand, in Estonia over four in ten (42%) choose light cigarettes.

Respondents are most likely to mention menthol flavoured cigarettes in Finland (24%), Denmark (20%) and the UK (18%). Younger respondents are slightly more likely to smoke menthol (11%) or additive-free or organic cigarettes (20%) than the average.

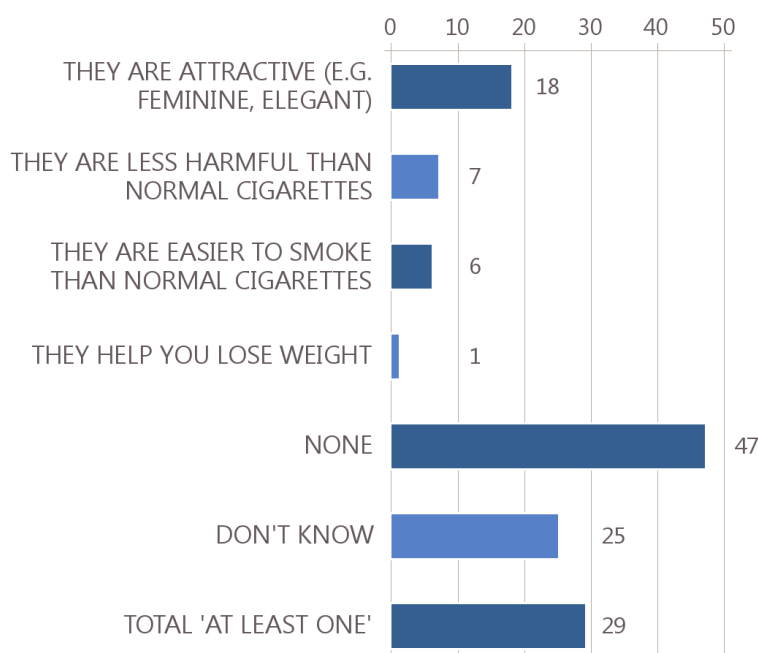
Slim cigarettes are particularly popular in Bulgaria (27%), Lithuania (26%) and Latvia (23%), but in most countries less than 10% of regular smokers smoke these cigarettes.

⁸ The following countries have a base size of less than 150 and should therefore be interpreted with caution: SE, LU, MT, CY

- Around four in ten (42%) slim cigarette smokers find them attractive -

29% of respondents associate at least one of the statements with slim cigarettes. The statement most frequently applied to slim cigarettes is that they are attractive. This is mentioned by nearly a fifth (18%) of respondents. All other statements were mentioned by less than one in ten (10%) of those polled.

QB8 Now let's talk about slim cigarettes. Which of the following statements, if any, do you think apply to this type of cigarette?
(% - EU)



Base: All respondents, N=27,901

While a majority of smokers do not identify slim cigarettes with any of the statements, a higher proportion see them as attractive, compared with respondents in general. Just over a quarter (26%) of smokers give this response, while less than one in ten see them as easier to smoke than normal cigarettes (9%) or as less harmful than normal cigarettes (8%). Almost no smokers think that slim cigarettes help you lose weight (1%). Smokers are, however, less unsure about slim cigarettes than the general population (15% versus 25%).

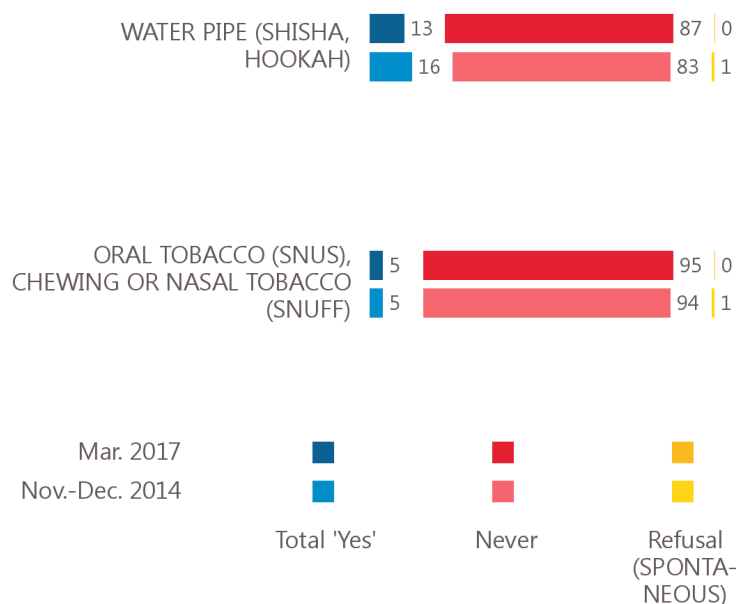
Slim cigarette smokers are generally much more likely to think that each of the statements apply to slim cigarettes than those who do not smoke them. This is true for the view that they are attractive (42% vs. 17%), less harmful (31% vs. 6%) and easier to smoke (34% vs. 16%). However, neither slim cigarette smokers nor non-slim cigarette smokers think that they help to lose weight.

- Almost three in ten (28%) 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, oral tobacco, and nasal tobacco, and how frequently.⁹

While a very large share of those surveyed have never tried these tobacco products, more than one in ten (13%) have tried a water pipe, a figure slightly down from the 16% who gave this response in December 2014. Only 5% of those polled have tried oral, chewing or nasal tobacco, a figure that remains unchanged since the previous survey.

QB7 Have you ever used or tried any of the following products?
(% - EU)



Base: all respondents, N=27,901

Respondents aged 15-24 are generally more likely to have at least tried water pipes. Overall 28% of young people say they have used them, although, only 2% say they use them on a monthly basis. A large share say that they have only tried them once or twice (16%).

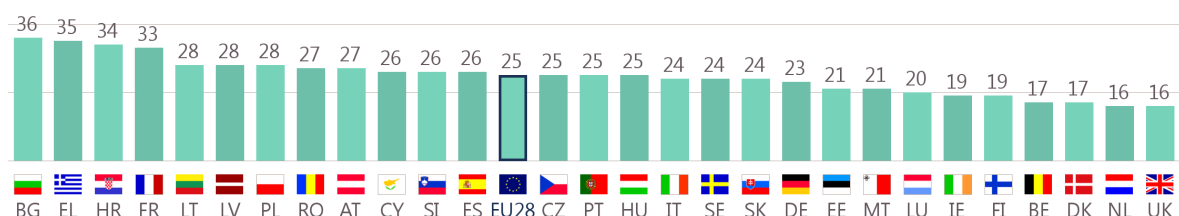
Latvia stands out for the particular popularity of water pipes, with nearly four in ten (38%) of respondents saying that they have used a water pipe at least once or twice. The same answer is given by nearly a third of those polled in Denmark (32%), Sweden (32%) and Estonia (31%), and over a quarter of respondents in Cyprus (27%).

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. It is therefore unsurprising to see that Sweden stands out on this question, with half (50%) of those polled in Sweden saying that they have tried oral, chewing or nasal tobacco. Sweden's neighbours, Denmark and Finland (both 16%), also have relatively large shares.

⁹ QB7. 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.

By combining the results of daily tobacco smokers¹⁰ (analysed earlier), as well as those who use oral or nasal tobacco or water pipes daily, we can calculate overall daily tobacco use in the EU. In most countries, the majority of daily tobacco users are smokers. However in Sweden, while around a quarter of respondents are daily tobacco users (24%), most of them are daily users of oral, chewing or nasal tobacco¹¹.

QB4B7 QB4a: How often do you use the following tobacco products?
QB7: Have you ever used or tried any of the following products?
Total 'At least one product'
(% - **DAILY USERS**)



Base: all respondents, N=27,901

II. EXPOSURE TO TOBACCO SMOKE IN PUBLIC PLACES

- A fifth of respondents say that the last time they went to a bar, people were smoking tobacco products inside -

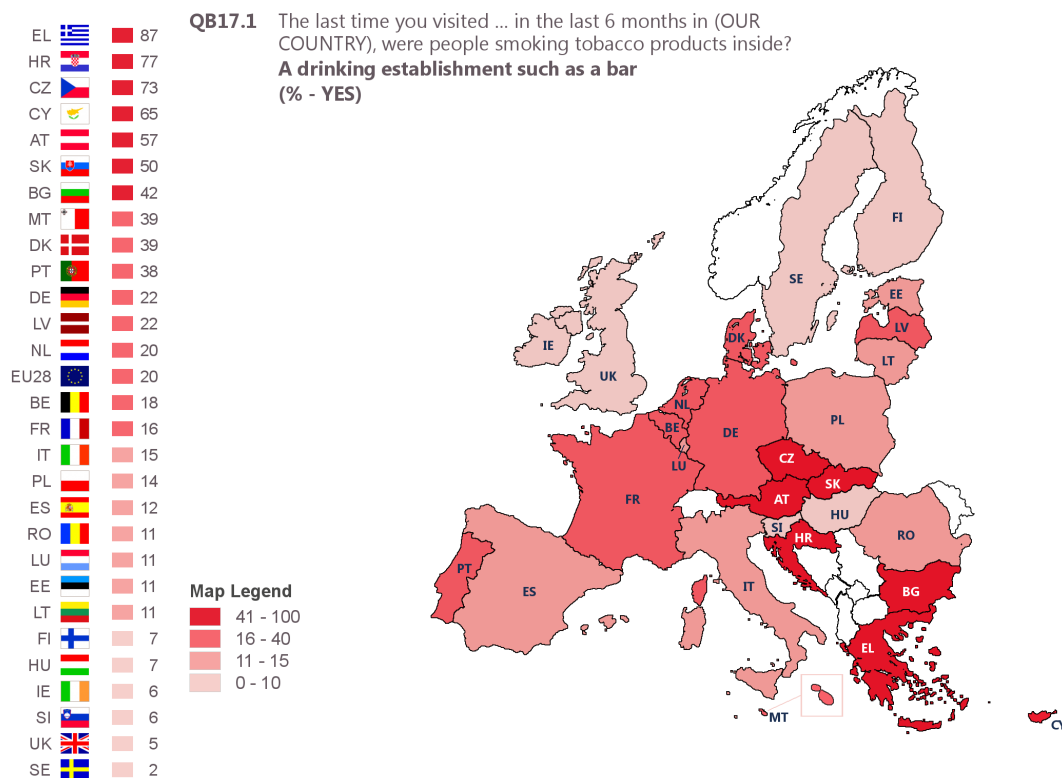
A fifth (20%) of respondents (who had visited a bar in the last 6 months) said that the last time they visited a bar, people were smoking inside (a decrease of 5 percentage points since the previous survey).

Several countries stand out for a particularly large proportion among respondents who encountered indoor smokers, most of which are in Southern Europe. Nearly nine in ten (87%) of those polled in Greece gave this response, as did over three quarters (77%) of those in Croatia and just under three quarters (73%) of respondents in the Czech Republic.

These results show that despite the existence of indoor smoking bans across the EU, indoor tobacco smoke in drinking establishments is still an issue in a number of countries.

¹⁰ These results were calculated based on the results of QB1, QB4a and QB7. The results were recalculated on all respondents.

¹¹ 20% of all Swedish respondents are daily oral, chewing or nasal tobacco users.



Base: all respondents excluding those who had not visited a bar in the last 6 months, N=25,625

- Less than one in ten respondents have recently encountered people smoking in restaurants –

The proportion of respondents who have recently come across people smoking in restaurants is significantly lower than in the case of bars. Less than one in ten (9%) respondents say that the last time they visited a restaurant during the last six months people were smoking inside.

Again, there are substantial country-level differences on this question. Greece (78%) once again stands out for the particularly high proportion of respondents who have come across indoor smokers. With the exception of Cyprus, where just over half (51%) of respondents reported coming across smokers in restaurants, the proportion giving this response is in the minority in all other countries. In 19 of the 28 Member States, less than one in ten (10%) of those polled reports having come across smokers in restaurants, and in Northern European countries very few give this response.

III. STARTING AND STOPPING TOBACCO SMOKING

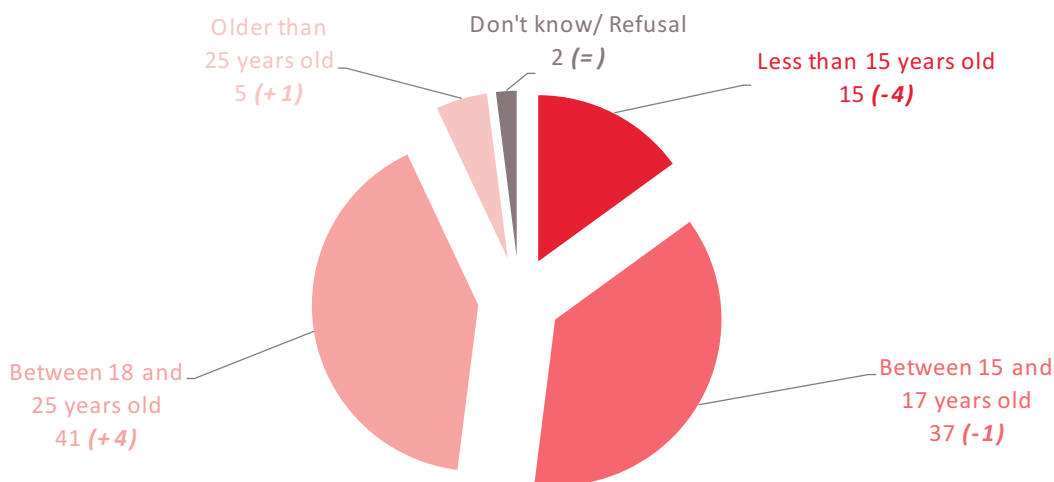
- A majority of respondents (52%) began smoking before the age of 18 -

By far the most common age to begin smoking is the period before the age of 18. Over half (52%) of current or former smokers developed a regular smoking habit at this age. Of this share, 15% started smoking before the age of 15, and 37% started smoking between the age of 15 and 17 years old. Around four in ten smokers or former smokers started smoking between the ages of 18-25 (41%), while very few started later in life (5%).

These figures have not changed significantly since the previous survey, although the proportion of those who took up smoking before the age of 15 has decreased slightly, by four percentage points.

In most cases (76%), smokers keep smoking for at least 10 years after taking up the habit.

QB2a How old were you when you started smoking on a regular basis, i.e at least once a week?
(% - EU)



(Mar. 2017 - Nov.-Dec. 2014)

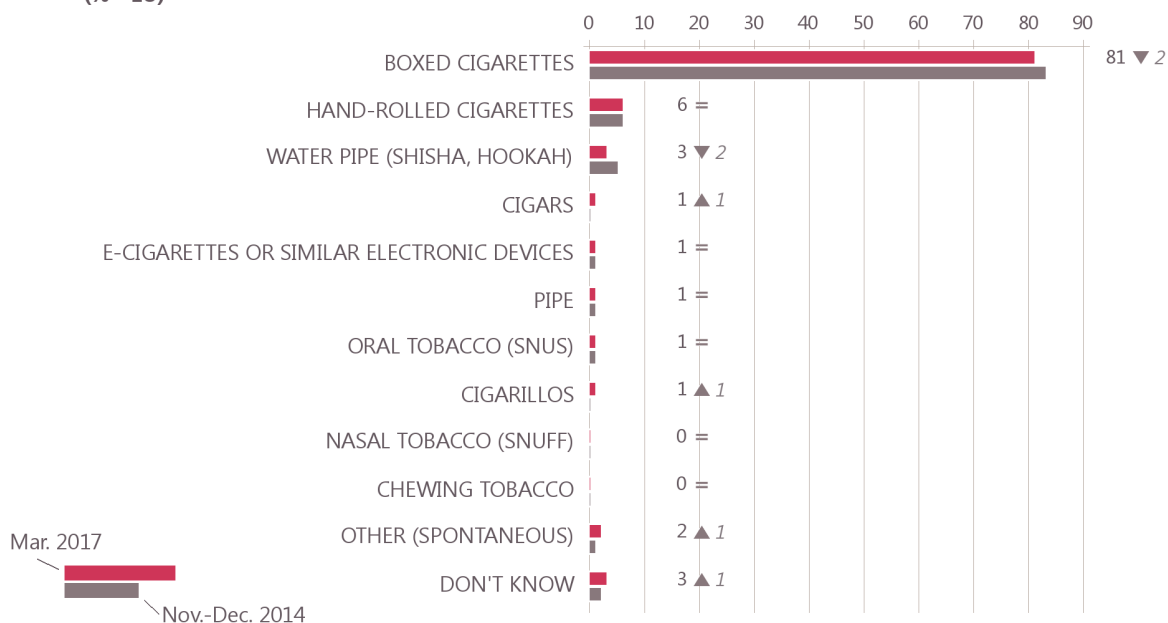
Base: respondents who smoke or used to smoke, N=12,926

The average age at which respondents began smoking is similar across the EU. The spread between the lowest and highest figures is only 2.9 years. In Italy and Belgium, the average smoker began smoking at the age of 17, compared with 19.7 in Latvia and 19.9 in Lithuania. In most cases, there has been very little change since the last survey. The main exceptions are Spain, where the average age has increased by 1.1 years, and Latvia, where it has increased by 1 year. In Slovakia, the average starting age has decreased by 0.9 years, and in Italy by 0.8 years.

- Most people's first experience with tobacco products was boxed cigarettes -

Among all respondents who have tried tobacco products, by far the most common first experience of tobacco is boxed cigarettes. Over eight in ten (81%) of those polled mention them, compared with less than one in ten (10%) who mention any other forms of tobacco or comparable products. There have been no significant changes since the December 2014 survey.

QB16 Which of the following products did you use or try first?
(% - EU)



Base: smokers, ex-smokers, respondents who have at least tried e-cigarettes, a water pipe or oral tobacco, N=16,142

In all countries, a significant majority of respondents say that their first experience of tobacco products was through smoking boxed cigarettes. In almost all cases, at least three-quarters of respondents mention boxed cigarettes. The most notable exceptions are the Netherlands, where just under a fifth (19%) of those polled mention hand-rolled cigarettes and only two thirds (66%) mention boxed cigarettes; and Sweden, where 16% of respondents mention oral tobacco and less than seven in ten (69%) mention boxed cigarettes.

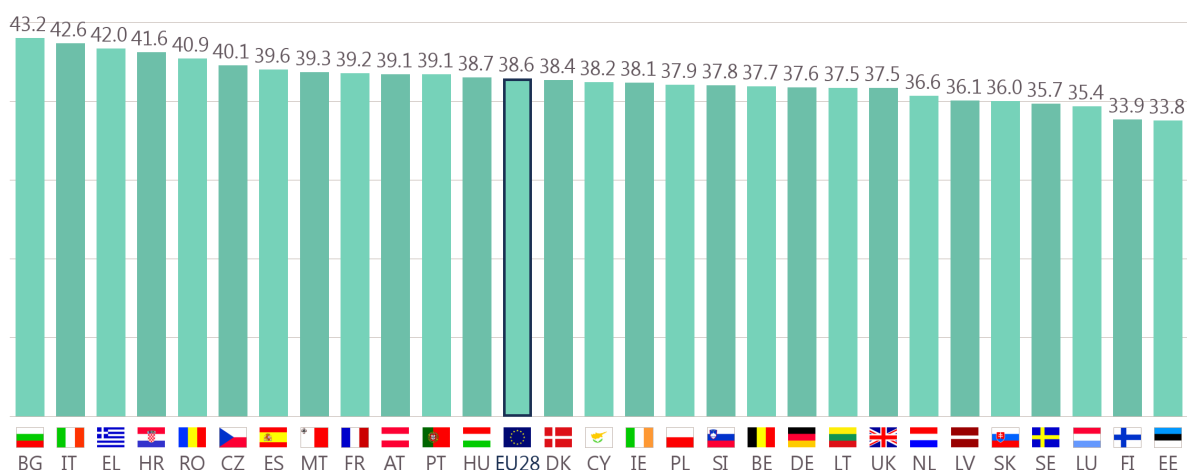
The **socio-demographic breakdown** shows that:

- Women (84%) are more likely than men (79%) to have had their first experience of tobacco by smoking boxed cigarettes.
- Less than seven in ten (69%) of those aged between 15 and 24 mention boxed cigarettes, compared with more than eight in ten (80%) of respondents in all other age categories.
- A significant proportion of young respondents started smoking with water pipes (12%). This is far higher than the average European respondents (3%).
- Respondents who have taken up smoking in the last two years are less likely to have first tried boxed cigarettes (76% vs. 82-86%) and slightly more likely to have started with hand-rolled cigarettes (11% vs. 6-8%) or a water pipe (5% vs. 0-1%).

- Most former smokers quit the habit in middle age -

The majority of regular smokers who succeeded in quitting the habit did so in the period from early to late middle age. Nearly four in ten (38%) of former smokers quit between the ages of 25 and 39, while three in ten (30%) quit between the ages of 40 and 54. Significantly fewer quit before the age of 25 (16%) or after the age of 54 (15%).

QB3 And how old were you when you stopped smoking?
(AVERAGE AGE)



Base: respondents who used to smoke, N=5,632¹²

The average respondent in the European Union was 38.6 at the time they stopped smoking. There is some country level variance, although in all countries the average is within five years of the EU28 average. In Czech Republic (40.1), Romania (40.9), Croatia (41.6), Greece (42.0), Italy (42.6) and Bulgaria (43.2) the average ex-smoker was over the age of 40 before they managed to quit, compared with only 33.8 in Estonia and 33.9 in Finland¹³.

Nearly a third (31%) of former smokers quit more than 20 years ago. Just over a quarter (26%) quit between 11 and 20 years ago, and the same proportion quit 5 years ago or fewer. Somewhat fewer (16%) gave up the habit between 6 and 10 years ago.

The average length of time since a respondent in the European Union stopped smoking is 16.2 years. In the Netherlands, the average ex-smoker stopped smoking 20 years ago, closely followed by Sweden (19.3) and Finland (18.4). However, the average ex-smoker in Bulgaria quit only 12.1 years ago.

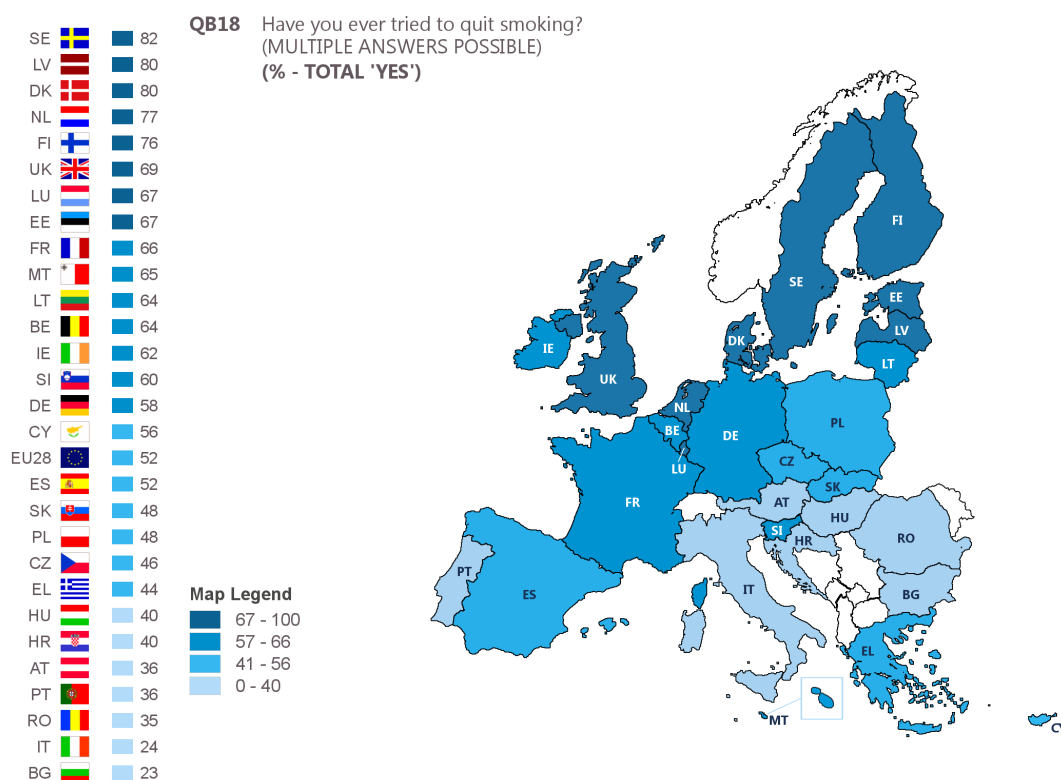
¹² The following countries have a base size of less than 150 and should therefore be interpreted with caution: CY, MT, LU, BG, IT, RO, PT

¹³ The following countries have a base size of less than 150 and should therefore be interpreted with caution: CY, MT, LU, BG, IT, RO, PT

- Over half of current smokers have attempted to quit smoking -

Over half (54%) of respondents who currently smoke have at some point attempted to stop. Most of those attempts took place more than a year ago, with nearly four in ten (39%) of those polled giving this response. Less than a fifth (15%) have attempted to give up smoking in the last 12 months. The proportion of smokers who say they have never tried to give up smoking has increased by seven percentage points since the December 2014 survey.

There are large differences at the country level¹⁴. As the map shows, respondents in Northern Europe are generally more likely than their Southern European counterparts to have attempted to quit smoking. In five countries, more than three quarters (75%) of smokers have tried to quit, with the highest proportions found in Sweden (82%), Latvia (80%) and Denmark (80%). In Bulgaria (23%) and Italy (24%) less than a quarter of smokers have tried to quit, and the proportions are also low in Romania (35%), Portugal (36%) and Austria (36%).



Base: respondents who smoke, N=7,293¹⁵

Compared with the last survey, the proportion of respondents who attempted to quit smoking in the last 12 months has fallen by 4 percentage points. In 21 of 28 Member States, the proportion of those who have tried to quit recently has decreased, albeit by varying amounts. In Romania, it has decreased by 12 percentage points, and in Denmark by 11 percentage points, but in Austria, the Netherlands and Slovakia by only 2 percentage points.

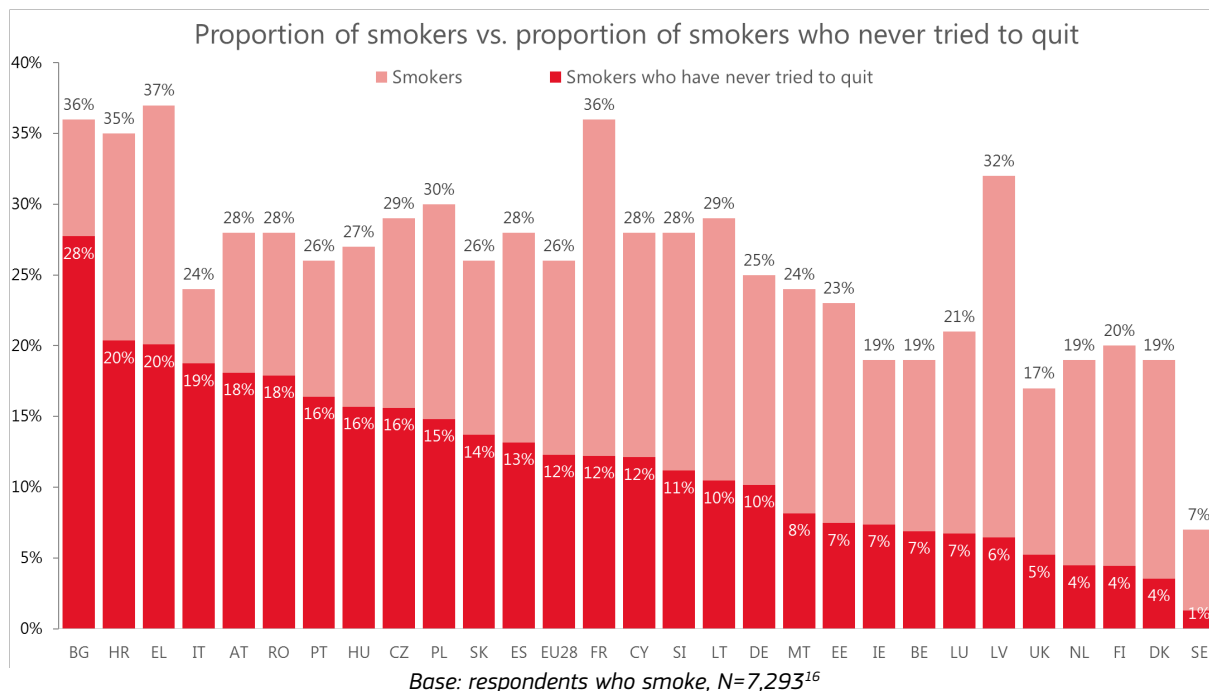
Smokers aged between 15 and 24 (22%) are almost twice as likely as those aged 40 or more (12%) to have attempted to give up smoking in the last 12 months. On the other hand, younger smokers (58%) are also considerably more likely than those aged 40 or more (42%) to say that they have never tried to give up.

¹⁴ The following countries have a base size of less than 150 and should therefore be interpreted with caution: SE, LU, MT, CY

¹⁵ The following countries have a base size of less than 150 and should therefore be interpreted with caution: SE, LU, MT, CY

Current smokers vs. current smokers who have never tried to quit

The chart below compares the total proportion of smokers per country with the proportion of smokers that have never tried to quit. In the EU, 12% of respondents are smokers who have never tried to quit smoking. The proportion of smokers that have never tried to quit varies considerably between countries and seems to be independent of overall smoking prevalence. For example, while 36% of respondents in France consider themselves smokers only 12% of respondents are smokers who have never tried to quit. In Latvia, 32% of respondents are smokers, but only 6% are smokers who have never tried to quit.



In Italy, on the contrary, less than a quarter of respondents are smokers (24%) and 19% of respondents have never tried to quit. Focussing on this group of smokers, Italy ranks fourth in Europe with a particularly high share of people who have never tried to quit.

In eleven EU countries, less than 10% of the respondents are smokers that have never tried to quit. In these countries, it may be that citizens are more conscious of the danger of tobacco smoke and are therefore more motivated to try to quit.

On the contrary, at least 20% of respondents are smokers who have never tried to quit in Bulgaria (28%), Croatia (20%) and Greece (20%).

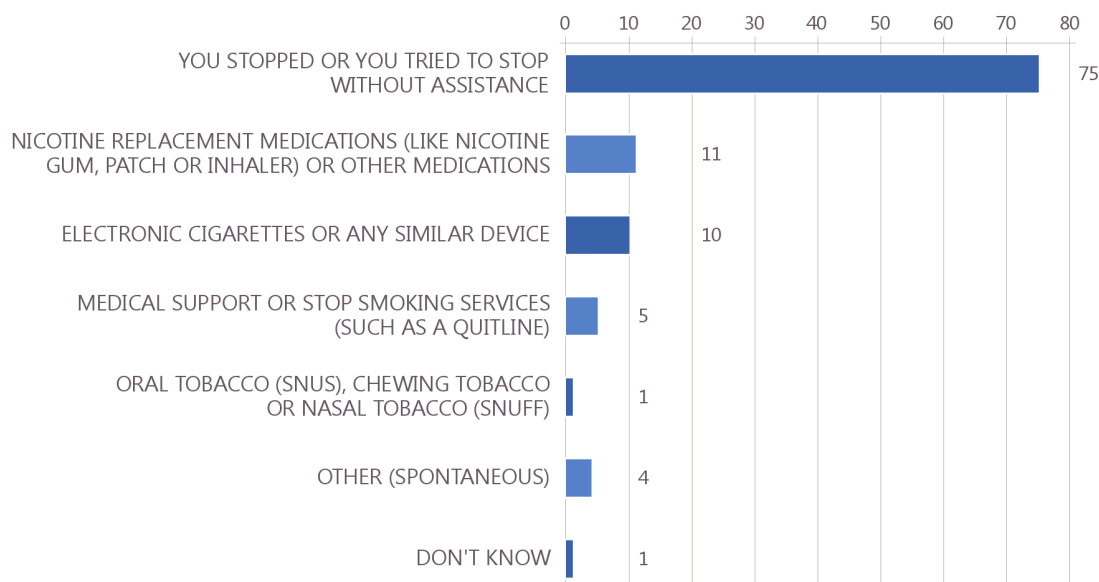
¹⁶ The following countries have a base size of less than 150 and should therefore be interpreted with caution: SE, LU, MT, CY

- Three quarters of those who have stopped smoking, or tried to stop, did not seek assistance -

Only a minority of smokers who have given up smoking or have attempted to give up smoking did so using various methods of assistance. Three quarters (75%) of those polled said that they gave up smoking – or attempted to give up smoking – without using any of these methods.

Just over one in ten (11%) mention nicotine replacement medications, and a further one in ten (10%) mention electronic cigarettes. Other options are less popular: only 5% used medical support or other services to help stop smoking, while only 1% switched to using oral, chewing or nasal tobacco.

QB19 Which of the following did you use in order to stop or to try to stop smoking? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)



Base: respondents who used to smoke or have tried to stop, N=9,430

There are significant differences at the country level in the proportions of those who attempted to stop smoking without assistance. In Spain, nine in ten (90%) of those polled attempted to stop smoking on their own, with a similar proportion of respondents in Romania (87%) and Slovenia (86%) giving this answer. However, in five countries fewer than two thirds (66%) of respondents have tried to quit without assistance, with particularly low proportions in the United Kingdom (60%) and Austria (61%).

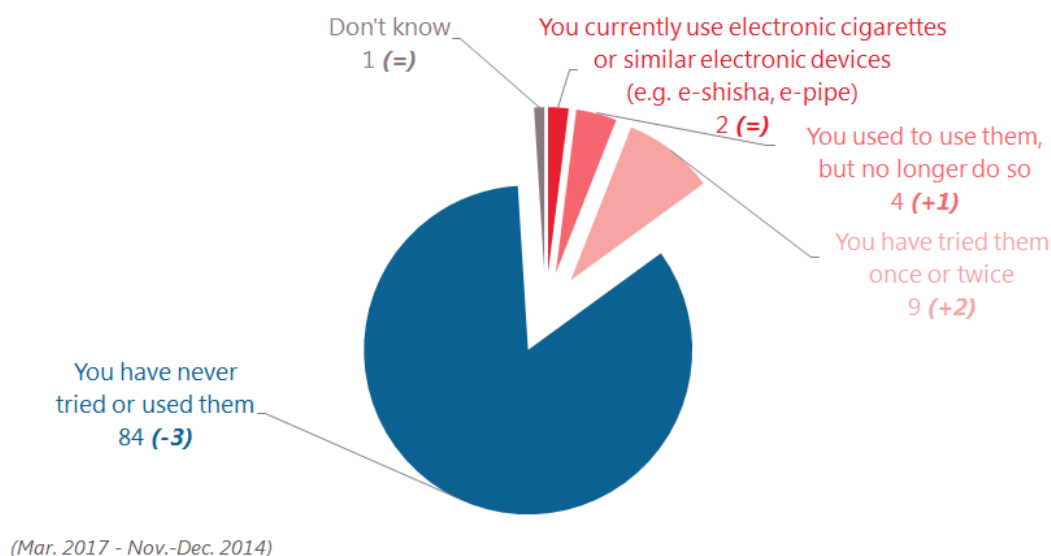
IV. E-CIGARETTE CONSUMPTION IN THE EUROPEAN UNION

- 15% of respondents have at least tried e-cigarettes -

Nearly one in ten (9%) have tried them once or twice but do not use them regularly. Very few currently use them, with only 2% of respondents giving this answer. A further 4% used to use them, but no longer do. Over eight in ten (84%) of those polled say that they have never tried or used electronic cigarettes. There has been little change since the previous survey in responses to this question.

Since 2014, the proportion of those who have at least tried these products has increased (15% vs. 12% in 2014).

QB11 Which of the following statements about the use of electronic cigarettes or any similar electronic devices (e-shisha, e-pipe) applies to you?
(% - EU)



Base: All respondents, N=27,901

Among those who currently use e-cigarettes, country-level differences are minimal. The highest proportion of respondents who use e-cigarettes is found in the United Kingdom (5%). The situation is similar when it comes to those who used to use them, but have stopped doing so. In France, this concerns nearly one in ten (9%), but elsewhere it is lower.

A quarter of young people have at least tried e-cigarettes as have 21% of those aged 25-39. By comparison 6% of respondents aged 55 or over have done so.

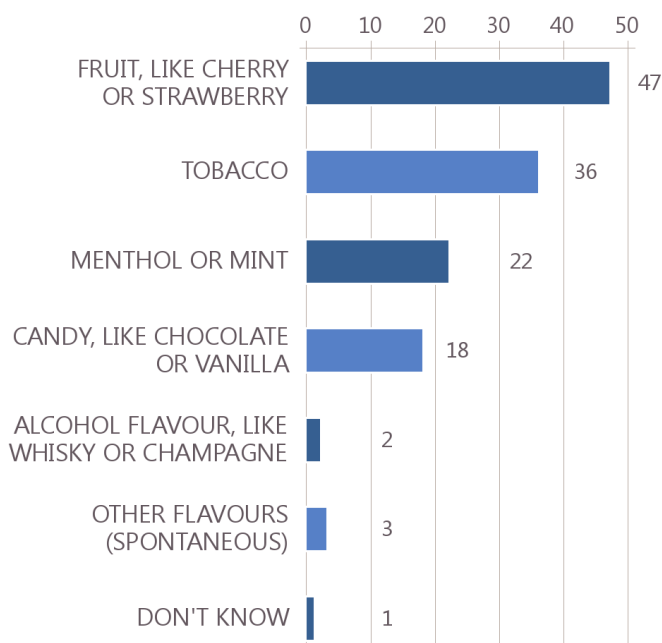
- Two thirds of e-cigarette users use them on a daily basis -

Among those who use electronic cigarettes, the majority use them daily, with two thirds (67%) giving this response. A further fifth (20%) do so every week, while less than one in ten use them monthly (7%) or less than monthly (6%). Overall, this means that 1% of respondents across the EU are daily e-cigarette users.

- The most popular flavour of e-cigarette among current users is fruit flavour, preferred by nearly half of respondents -

Among current e-cigarette users who use them at least on a monthly basis, the most popular flavour of e-cigarette is fruit flavour, mentioned by nearly half (47%) of respondents. Tobacco flavour (36%) is slightly less popular, followed by menthol or mint (22%) and candy flavour (18%). Alcohol flavoured e-cigarettes are the least popular, favoured by only 2% of respondents, while a small minority (3%) also mentioned other, unspecified, flavours.

QB13a Which of the following e-cigarette liquid flavours do you use on a monthly basis? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)



Base: respondents who use e-cigarettes at least on a monthly basis, N=527

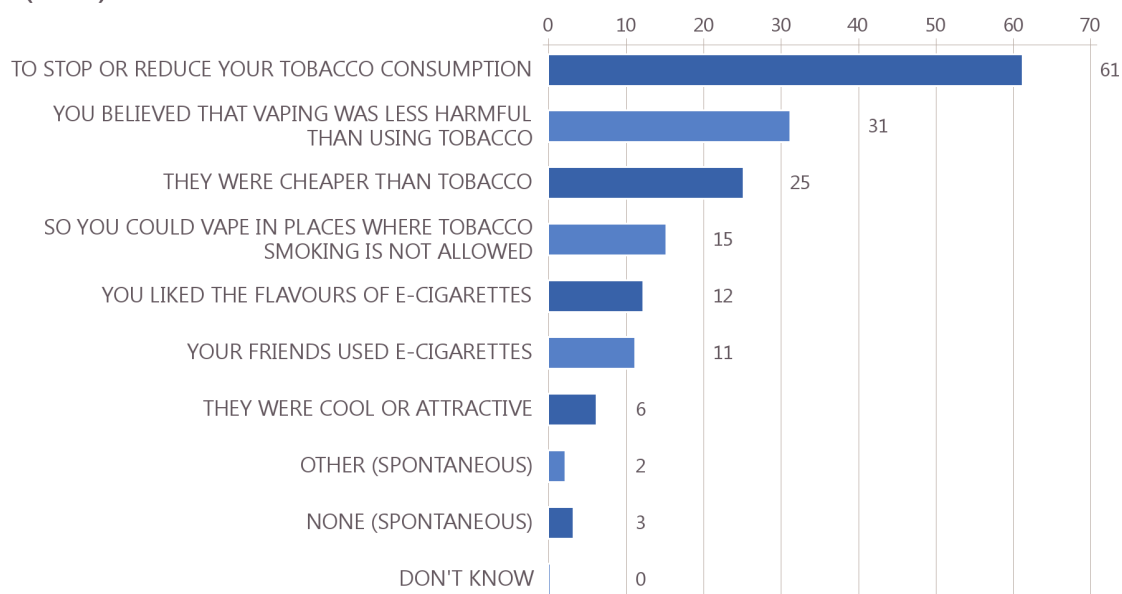
V. MOTIVATIONS FOR STARTING TO USE ELECTRONIC CIGARETTES

- Over six in ten respondents took up e-cigarettes to try to curb their tobacco consumption -

By far the most frequently mentioned reason for taking up e-cigarettes was to stop or reduce tobacco consumption. Just over six in ten (61%) of those polled say that they started smoking e-cigarettes for this reason.

All other reasons are cited only by a minority of respondents. Just under a third (31%) say that they started using e-cigarettes because they saw them as less harmful, while a quarter (25%) cite the lower cost of e-cigarettes as a reason for taking them up. Fewer respondents mention social factors: that they enabled vaping in areas where tobacco smoking is not allowed (15%), that friends were also taking up e-cigarette smoking (11%), or that they perceived e-cigarettes as cool or attractive (6%). The flavours of e-cigarettes were also relatively unimportant as a reason for starting to use them; only just over one in ten (12%) mention this as a factor.

QB14 Which of the following factors, if any, were important in your decision to start using e-cigarettes? (MAX. 3 ANSWERS)
(% - EU)



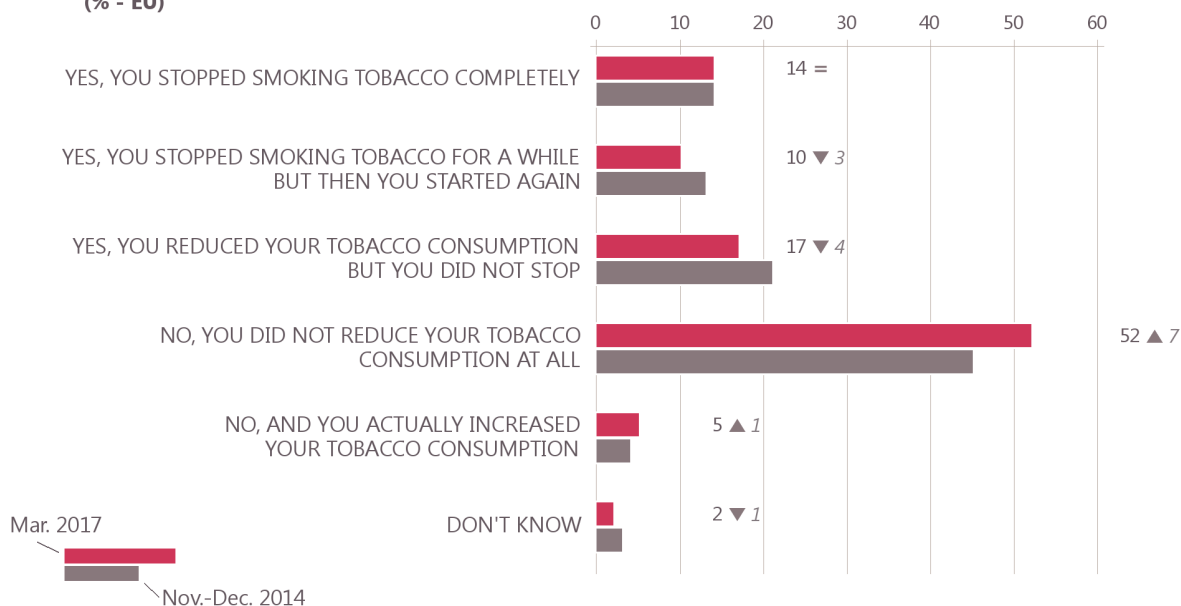
Base: respondents who currently use or used e-cigarettes, N=1,565

- Fewer than half of e-cigarette users say these devices helped them curb their tobacco intake -

A majority of smokers and former smokers who use, or have used, e-cigarettes say that these devices did not help them reduce their tobacco consumption. Just over half (52%) of those polled give this response, a rise of seven percentage points on the figure recorded in the December 2014 survey.

Only 14% of respondents say that using e-cigarettes enabled them to stop smoking tobacco entirely, a figure unchanged since the last survey. A further one in ten (10%) say that as a result of taking up e-cigarettes they stopped smoking tobacco for a while, but then started again. This figure has decreased by three percentage points since the last survey. Nearly a fifth (17%) of respondents reduced their tobacco consumption due to the use of e-cigarettes, but did not stop using tobacco entirely, a figure down by four percentage points since 2014. Finally, a small minority (5%) of respondents actually increased their tobacco consumption after taking up e-cigarettes.

QB15 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? (% - EU)



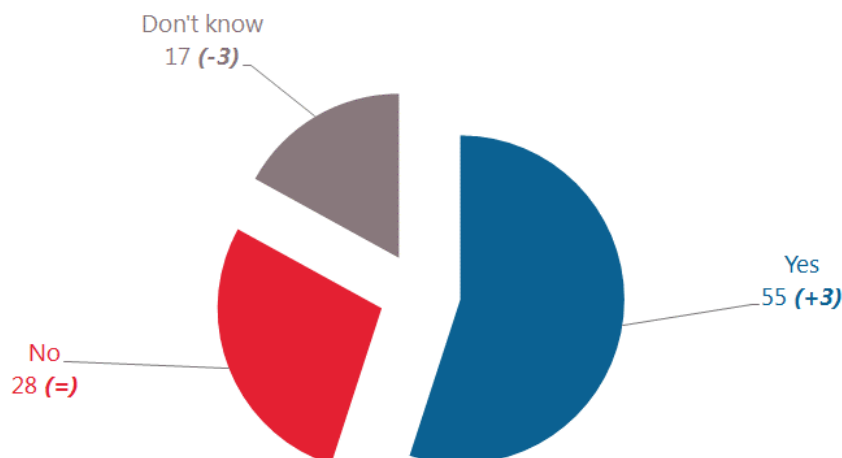
Base: respondents who smoke or used to smoke and have at least tried e-cigarettes, N=3,612

VI. AWARENESS AND EXPOSURE TO ADVERTISING OF E-CIGARETTES

- Over half think that e-cigarettes are harmful to the health of their users -

The majority of respondents think that e-cigarettes are harmful to the health of their users. Over half (55%) answer this question in the affirmative, an increase of three percentage points since the last survey. Less than three in ten (28%) think that e-cigarettes are not harmful, and a further 17% of respondents do not know whether they are harmful or not.

QB9 In recent years electronic cigarettes or e-cigarettes have been increasingly marketed in Europe. Do you think that they are harmful or not to the health of those who use them? (% - EU)



(Mar. 2017 - Nov.-Dec. 2014)

Base: all respondents, N=27,901

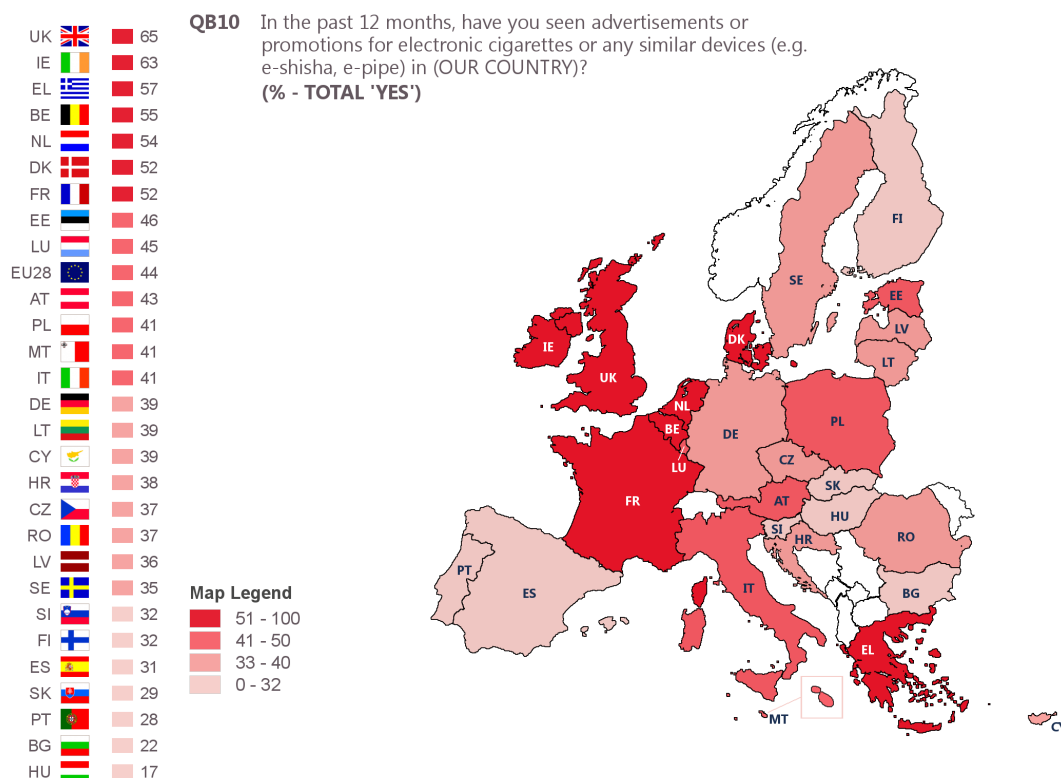
In all but six countries, at least half of respondents agree that they are harmful. In seven countries, over three quarters (75%) of respondents give this answer, with particularly large proportions of respondents in Latvia (80%), Lithuania (80%), Finland (81%) and the Netherlands (85%). Italy stands out for the particularly small proportion of respondents who think that e-cigarettes are harmful, with just over a third (34%) of respondents in this country agreeing with the claim.

The proportion of respondents who think that e-cigarettes are harmful has increased in almost all countries since the December 2014 survey, most prominently in Latvia (+17pp) and Hungary (+16pp). In three countries, the proportion of those who think that e-cigarettes are harmful to their users has decreased: Sweden (-3 pp), Romania (-6 pp) and Italy (-7 pp).

- Nearly half of those polled have seen an advertisement for e-cigarettes or similar devices, but few have seen them often -

The majority (53%) of those polled say that they have not seen an advertisement for e-cigarettes or similar products during the last 12 months.

There are significant differences at the country level, but no clear geographical pattern. In most countries, only a minority of those polled have seen advertisements for e-cigarettes, ranging from less than a fifth (17%) of those polled in Hungary to nearly half (46%) of respondents in Estonia. In seven countries, a majority of respondents have seen these advertisements, ranging from just over half of those polled in France (52%) and Denmark (52%) to nearly two thirds (65%) of respondents in the United Kingdom, and nearly as many in Ireland (63%).



Base: all respondents, N=27,901

Two countries stand out for the particularly high proportion of respondents who say they have 'often' seen these advertisements. In Ireland, nearly a fifth (18%) give this answer, as do nearly a quarter (23%) of those polled in the United Kingdom. In most cases, less than one in ten (10%) respondents have seen these advertisements often.

VII. ATTITUDES TOWARDS TOBACCO AND E-CIGARETTE POLICIES

- Support for each of the policies is high, although there are large differences between smokers and non-smokers, e-cigarette users and non-users -

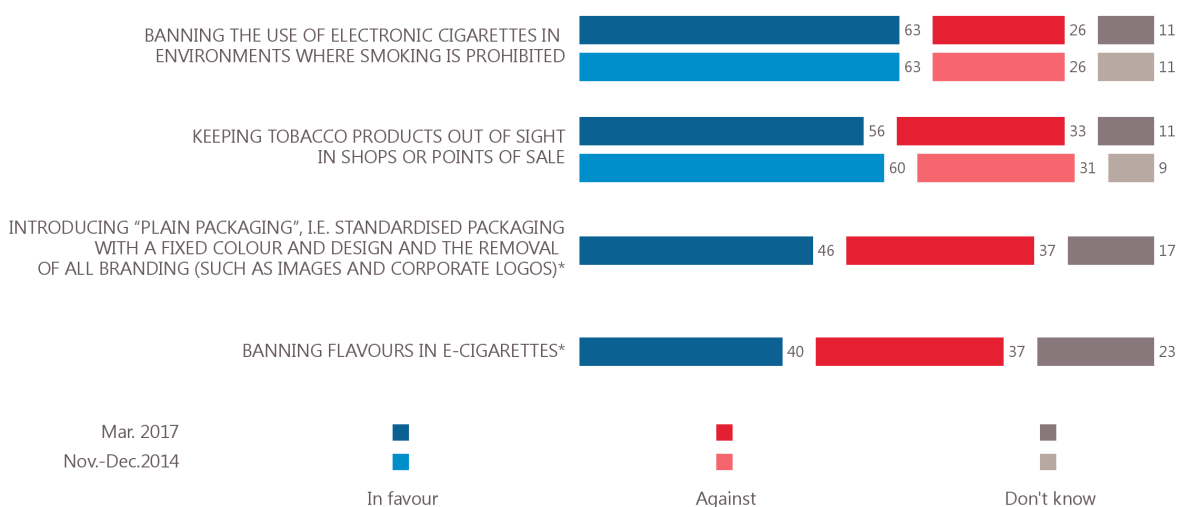
A significant majority of respondents are in favour of prohibiting the use of e-cigarettes in places where smoking bans have been introduced. Nearly two thirds (63%) of those polled say that such a ban should be brought in, while only just over a quarter (26%) are against such a ban. Public opinion has remained stable on this question since the last survey in December 2014.

A slightly smaller majority favours keeping tobacco products out of sight in the places where they are sold, with 56% of respondents giving this answer, down four percentage points since the previous survey. A third (33%) are opposed to this idea.

Just under half of respondents support the idea of introducing plain packaging, with 46% of those polled giving this answer. However, nearly four in ten (37%) are opposed to this, while nearly a fifth (17%) do not know whether this policy should be implemented or not.

Respondents are divided on the question of whether a ban should be enacted on flavours in e-cigarettes. Four in ten (40%) respondents agree that it should, while slightly fewer (37%) oppose such a ban. Nearly a quarter (23%) are undecided on this policy.

QB20 Would you be in favour or against any of the following measures?
(% - EU)



Base: all respondents, N=27,901

The United Kingdom (68%) and Ireland (73%) have recently implemented **plain packaging** legislation, which may account for the distinctly higher level of approval for this policy. However, the policy has already been implemented in France, where nearly half (45%) are against the initiative and less than four in ten (39%) are in favour. Opposition to the policy is also high in the Czech Republic, where half (50%) say that they are against such legislation.

Respondents are now more likely to support the **banning of electronic cigarettes in environments where smoking is prohibited** in 14 countries. This is particularly the case in the Netherlands (+12pp), Lithuania, Finland and the United Kingdom (all +8pp). At the other end of the scale, respondents in Austria (-8pp), Czech Republic (-7pp) and Malta (-6pp) are now less likely to support the measure.

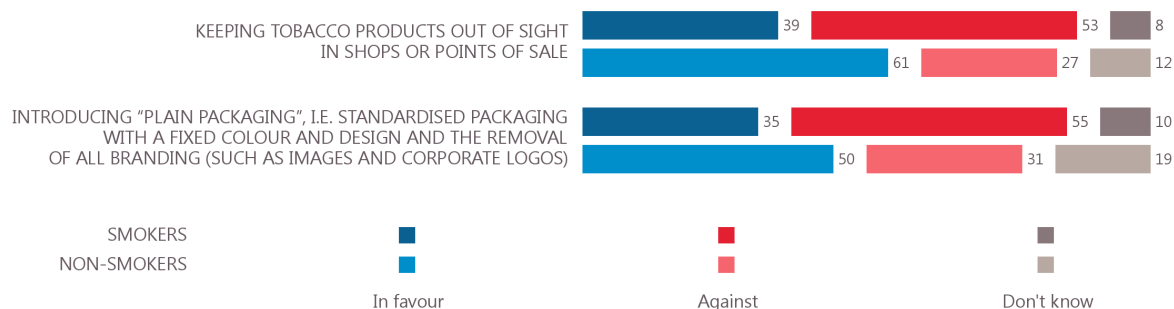
Almost all countries have witnessed a decrease in the proportion of respondents who are in favour of **keeping tobacco products out of sight in shops or points of sale**.

If the sample is split between smokers and non-smokers or between e-cigarette users and non-users, there are clear differences in attitudes to these policies.

On the question of keeping tobacco products out of sight at points of sale, the difference is particularly large. Less than four in ten (39%) of smokers favour this policy, while over half (53%) are against it. Conversely, over six in ten (61%) non-smokers are in favour, and only just over a quarter (27%) are opposed.

Only just over a third (35%) of smokers support the introduction of plain packaging, with over half (55%) of those polled opposing it. Half (50%) of non-smokers favour this policy, with just under a third (31%) against it, but nearly a fifth (19%) of non-smokers do not know whether they support or oppose this policy.

QB20 Would you be in favour or against any of the following measures?
(% - EU)

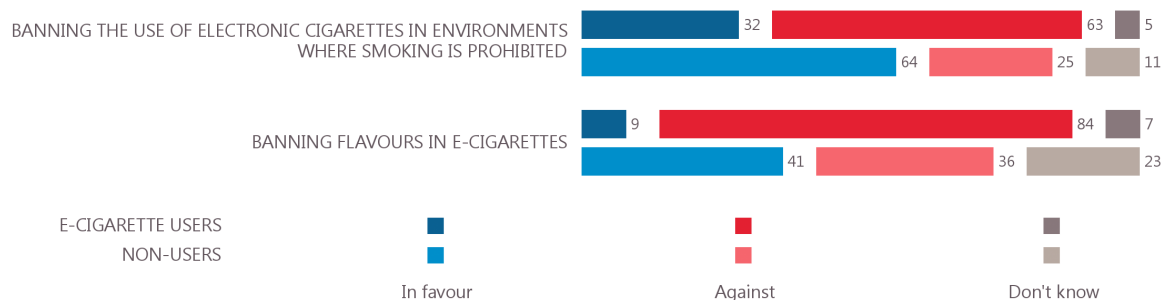


Base: Smokers, N=7,444; Non-smokers, N=20,490

E-cigarette users are significantly less likely to favour a ban on electronic cigarettes in places that already ban smoking. Just under a third (32%) of e-cigarette users agree with this policy and around two thirds (63%) are opposed. This compares with nearly two thirds (64%) of non-users who agree with it and just a quarter (25%) who disagree.

Over eight in 10 e-cigarette users (84%) are opposed to a ban on flavours in e-cigarettes, with less than a tenth (9%) supporting this policy. By contrast, non-users (41%) are more likely to be in favour than opposed (36%) and around a quarter (23%) do not know whether they support or oppose it.

QB20 Would you be in favour or against any of the following measures?
(% - EU)



CONCLUSIONS

There has been a general downward trend in Europeans' consumption of tobacco products for several years, although this has remained stable since 2014. Despite this success, tobacco products are still consumed by more than a quarter of Europeans. The overall picture also disguises significant geographical differences, with people in Southern European countries more likely to be smokers, while people in Northern Europe are more likely to have succeeded in quitting smoking. Furthermore, established socio-demographic tendencies persist: men, young people, the unemployed, those on low incomes, and those with lower levels of education are more likely to have a smoking habit than those in other social groups.

Smoking remains a regular habit among the majority of those who smoke. Over nine in ten smokers consume tobacco products daily. Boxed cigarettes remain by far the most popular variety of tobacco product, consumed by nearly eight in ten European smokers at least once a month. Hand-rolled cigarettes are also popular with a significant minority in many countries – and particularly among men, the unemployed, and young people – but other tobacco products like cigars, cigarillos and pipes are consumed regularly only by a minority. The average European smoker smokes around 14 cigarettes each day, a slightly lower figure than the 16 cigarettes that ex-smokers reported smoking when they had a smoking habit.

Smokers are most likely to develop a regular smoking habit before the age of 18, and to maintain that habit well into middle age. More than half of current smokers have attempted to quit the habit, but only a minority have tried to do so with the assistance of anti-smoking aids, most preferring to try to quit without assistance.

E-cigarettes, have been tried by 15% of respondents in the EU. Over half of respondents think that these products are harmful to health. Of those who have used them, over six in ten did so in an attempt to curb their consumption of tobacco or quit. However, in line with the findings of previous surveys, a majority of respondents say that e-cigarettes did not help them stop or reduce smoking, and only just over one in ten say that they stopped completely.

Around half of regular smokers reported they smoke cigarettes with special characteristics, such as additive-free, menthol, light, or slim cigarettes. The popularity of these various types of cigarette varies between countries and socio-demographic groups.

17% of respondents across the EU have tried water pipes. The prevalence of oral, chewing or nasal tobacco consumption remains limited with the exception of Sweden (50%).

On average, only a minority of respondents have recently seen smoking occurring indoors in drinking establishments like bars and eating establishments like restaurants, areas targeted by anti-smoking legislation. However, the general average disguises significant differences among countries. For instance, a significant majority of respondents in Greece report coming across smoking in both bars and restaurants, despite the fact that Greece has a partial ban on smoking in bars and a total ban on smoking in restaurants. Since Romania introduced its ban on smoking in public establishments in 2016, there have been significant decreases in the proportion of respondents reporting that they encountered smoking in bars or restaurants. This indicates significant asymmetries when it comes to enforcement of anti-smoking legislation.

There is much public support for extending bans on indoor smoking to e-cigarettes. Nearly two thirds of respondents support such a ban, although almost the same proportion of e-cigarette users are against the idea. There is also majority support (although not among smokers) for keeping tobacco products out of sight at points of sale, but the public are more divided on the issue of plain packaging with significant variations among Member States.

While a relative of majority believe in banning flavours in e-cigarettes, this initiative is unpopular among e-cigarette users.

The overall results from this survey indicate that while citizens in some EU countries are becoming less prone to developing smoking habits, there is much work to be done in targeting countries and socio-demographic groups where the habit remains pervasive, and in enforcing those measures that have already been implemented, both at national and EU level.

TECHNICAL SPECIFICATIONS

Between the 18th March and the 27th March 2017, TNS opinion & social, a consortium created between TNS political & social, TNS UK and TNS opinion, carried out the wave 87.1 of the EUROBAROMETER survey, on request of the EUROPEAN COMMISSION, Directorate-General for Communication, "Strategic Communication" Unit.

The wave 87.1 covers the population of the respective nationalities of the European Union Member States, resident in each of the 28 Member States and aged 15 years and over.

	COUNTRIES	INSTITUTES	N° INTERVIEWS	DATES FIELDWORK		POPULATION 15+	PROPORTION EU28
BE	Belgium	TNS Dimarso	1.023	18/03/17	27/03/17	8.939.546	2,17%
BG	Bulgaria	TNS BBSS	1.044	18/03/17	27/03/17	6.537.510	1,58%
CZ	Czech Rep.	TNS Aisa	1.058	18/03/17	27/03/17	9.012.443	2,18%
DK	Denmark	TNS Gallup DK	1.000	18/03/17	27/03/17	4.561.264	1,11%
DE	Germany	TNS Infratest	1.537	18/03/17	27/03/17	64.336.389	15,59%
EE	Estonia	TNS Emor	1.017	18/03/17	27/03/17	945.733	0,23%
IE	Ireland	Behaviour & Attitudes	1.021	18/03/17	27/03/17	3.522.000	0,85%
EL	Greece	TNS ICAP	1.010	18/03/17	27/03/17	8.693.566	2,11%
ES	Spain	TNS Spain	1.024	18/03/17	27/03/17	39.127.930	9,48%
FR	France	TNS Sofres	1.004	18/03/17	27/03/17	47.756.439	11,57%
HR	Croatia	HENDAL	1.022	18/03/17	25/03/17	3.749.400	0,91%
IT	Italy	TNS Italia	501	18/03/17	25/03/17	51.862.391	12,57%
CY	Rep. Of Cyprus	CYMAR	1.004	18/03/17	27/03/17	705.360	0,17%
LV	Latvia	TNS Latvia	1.001	18/03/17	27/03/17	1.447.866	0,35%
LT	Lithuania	TNS LT	510	18/03/17	25/03/17	2.829.740	0,69%
LU	Luxembourg	TNS ILReS	1.048	18/03/17	26/03/17	434.878	0,11%
HU	Hungary	TNS Hoffmann	1.053	18/03/17	27/03/17	8.320.614	2,02%
MT	Malta	MISCO	500	18/03/17	27/03/17	335.476	0,08%
NL	Netherlands	TNS NIPO	1.015	18/03/17	27/03/17	13.371.980	3,24%
AT	Austria	ipr Umfrageforschung	1.001	18/03/17	27/03/17	7.009.827	1,70%
PL	Poland	TNS Polska	1.008	18/03/17	27/03/17	32.413.735	7,86%
PT	Portugal	TNS Portugal	1.061	18/03/17	26/03/17	8.080.915	1,96%
RO	Romania	TNS CSOP	1.033	18/03/17	27/03/17	18.246.731	4,42%
SI	Slovenia	Mediana	1.027	18/03/17	27/03/17	1.759.701	0,43%
SK	Slovakia	TNS Slovakia	1.014	18/03/17	26/03/17	4.549.956	1,10%
FI	Finland	TNS Gallup Oy	1.012	18/03/17	27/03/17	4.440.004	1,08%
SE	Sweden	TNS Sifo	1.007	18/03/17	27/03/17	7.791.240	1,89%
UK	United Kingdom	TNS UK	1.346	18/03/17	27/03/17	51.848.010	12,57%
TOTAL EU28			27.901	18/03/17	27/03/17	412.630.644	100%*

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

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 II¹ (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"). All interviews were conducted face-to-face in people's homes and in the appropriate national language. As far as the data capture is concerned, CAPI (*Computer Assisted Personal Interview*) was used in those countries where this technique was available.

For each country a comparison between the sample and the universe was carried out. The Universe description was derived from Eurostat population data or from national statistics offices. For all countries surveyed, a national weighting procedure, using marginal and intercellular weighting, was carried out based on this Universe description. In all countries, gender, age, region and size of locality were introduced in the iteration procedure. For international weighting (i.e. EU averages), TNS opinion & social applies the official population figures as provided by EUROSTAT or national statistic offices. The total population figures for input in this post-weighting procedure are listed here.

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%									

¹ Figures updated in August 2015