

# THE EU NICOTINE USERS SURVEY 2020

## The EU residents report



European Tobacco Harm Reduction Advocates (ETHRA)

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Between 12<sup>th</sup> October to 31 December 2020, more than 37,000 persons responded to ETHRA's online EU Nicotine Users Survey. ETHRA partners designed the questionnaire, translated it into 16 languages and analysed the data, all on a voluntary basis. To summarise the results, we first highlight ten key facts, which are then analysed in the report on the results for the 35,296 participants from the 28 EU countries subjected to the European directive on tobacco products (TPD).

# THE EU NICOTINE USERS SURVEY 2020 IN 10 KEY FACTS

More than 35,000 residents from 28 EU countries, including the UK, participated in the survey. Each participant took on average 11 minutes to complete the questionnaire. The 44 questions addressed consumer use of nicotine, with topics including: smoking and the desire to quit, use of alternative nicotine products, and barriers to switching caused by the Tobacco Products Directive and national regulations.

## Harm reduction helps us to quit smoking

1. Safer nicotine products help hugely with quitting smoking. Among those who were ever smokers, **73.7% of snus users and 83.5% of vapers had stopped smoking.**
2. **Harm reduction was the most strongly cited reason for adopting snus (75%) and vapes (93%),** followed by quitting smoking for 60% of snus users and more than 90% of vapers. Reduced costs, flavours, availability of products and (specifically for vapers) the ability to adjust vaping products, are all important factors for consumers when adopting harm reduction products.
3. More than **31% of current smokers would be interested in trying snus** if it was legalised in the EU.

## Vape taxes, flavour bans and lack of access are barriers to quitting smoking

4. More than **67% of smokers want to quit** smoking. However, these smokers encounter barriers in their desire to be smoke-free. Nearly a quarter (24.3%) of EU smokers who want to quit are deterred by the high price of low-risk alternatives. This proportion increased to 34.5% in the 12 EU countries with a vape tax in 2020 and to 44.7% in the three countries with a high vape tax (Finland, Portugal and Estonia).
5. Taxes on vaping products are **a significant barrier to quitting smoking** for people who vape and smoke ('dual users'). The proportion of dual users from the 12 countries with a vape tax who are prevented from switching exclusively to vaping (28.1%) because of the cost is **more than three times** higher than for dual users from the 16 countries without vape excise (8.6%).
6. Vape flavour bans, in Finland and Estonia, and the vape sales state monopoly in Hungary, are **making it more difficult for people to stop smoking.** One of the main consequences is that consumers are using the black market and other alternative sources, or buying from abroad. In these three countries, only 45% of vapers used a

local conventional source to get e-liquids, compared to 92.8% in countries without vape tax and flavours ban.

## TPD limits had unintended consequences on vape consumption

7. Compared to a large online survey conducted in 2013, before the current TPD was implemented<sup>1</sup>, the average volume of e-liquid used per day has significantly **increased – from 3 ml/day in 2013 to 10 ml/day in 2020** – while the nicotine concentration of these e-liquids has significantly **decreased – from 12 mg/ml in 2013 to 5 mg/ml in 2020**.

Two thirds (65.9%) of vapers are using e-liquid with a nicotine concentration below 6 mg/ml. This trend appears to be in large part a consequence of the TPD 20 mg/ml nicotine concentration limit and the 10 ml volume limit on e-liquid bottles. Because of nicotine self-titration, vapers who use e-liquids with a lower nicotine concentration are likely to compensate by consuming a higher volume of liquid.

- Should the 20 mg/ml nicotine limit be lifted, **24% of vapers declared that they would consume less e-liquid and 30.3% of people who vape and smoke think they could quit smoking completely.**
- Should the 10 ml bottle limit be repealed, **87% of vapers would buy larger bottles** to reduce the cost and 89% would buy larger bottles to reduce plastic waste, while only 35.5% said they would probably continue to buy short-fills and add nicotine themselves.

These limits should be revised upwards in the next TPD.

## An EU vape tax and/or flavour ban would fuel the black and grey markets

8. The survey also asked participants about other possible European regulatory developments. On the cost issue, a large proportion of vapers could or would not tolerate price increases. **If an EU wide high excise was applied to e-liquid, more than 60% of users would look for alternative untaxed sources<sup>2</sup>.**

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<sup>1</sup> Farsalinos, K. E.; Romagna, G.; Tsiapras, D.; Kyrzopoulos, S.; Voudris, V. Characteristics, Perceived Side Effects and Benefits of Electronic Cigarette Use: A Worldwide Survey of More than 19,000 Consumers. *Int. J. Environ. Res. Public Health* 2014, 11, 4356-4373. <https://doi.org/10.3390/ijerph110404356>

<sup>2</sup> Note that the survey was conducted in the last quarter of 2020, before the increase in vape tax in Italy, the entry into force of the vape tax stamp in Poland, the suspension of the vape tax in Estonia and the announcement of proposals for an ultra-high vape tax in Germany.

9. If flavours were banned, more than **71% of vapers would look for alternative sources** to the legal market.

### **EU vapers want access to clear and objective information**

10. **A vast majority of vapers support public access to EU databases** on vaping products, for data on e-liquid ingredients (83%), resistance elements (66%) and characteristics of integrated circuits (56%). Also 74% would find an information page on vaping useful, such as the website provided by the New Zealand authorities<sup>3</sup>.

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<sup>3</sup> <https://vapingfacts.health.nz/>

# IN LIGHT OF THESE RESULTS, ETHRA RECOMMENDS

**Lifting the snus ban in the EU.** Snus permits Swedish nicotine users to opt for a harm reduction path, which has led to the largest decline in smoking-related diseases in the EU. Snus has been fully recognized as a reduced risk product which is appropriate for the protection of public health by US FDA<sup>4</sup>. Even if only a fraction of smokers adopted snus, it would reduce the burden of smoking-related illness and premature death for millions of Europeans.

**The TPD 10 ml limit on e-liquid bottles must urgently be repealed** to allow vapers to buy e-liquid in normal volumes at an adequate nicotine level and permit a large proportion of them to reduce their e-liquid consumption.

**Increasing the nicotine concentration limit of E-liquid** would reduce the consumption of e-liquid for a quarter of vapers and allow entrenched smokers to have access to more effective products. Despite suggestions made in 2013 during the TPD debates, no vaping product higher than 20 mg/ml is available from the pharmaceutical network in 2021.

**Vaping taxes, vape flavour bans and state sales monopolies are barriers to smoking cessation** in the countries that apply them. They also force consumers to the black market or other alternative sources and buying abroad, with all the insecurity these situations bring, push people to smoke, and undermine the political and health authorities. Member states and the EU must stop going in this extremely dangerous direction.

The vast majority of low-risk nicotine users think that the European administration should provide **honest, open and accessible information** about safer alternatives to smoking.

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<sup>4</sup> FDA grants first-ever modified risk orders to eight smokeless tobacco products  
<https://www.fda.gov/news-events/press-announcements/fda-grants-first-ever-modified-risk-orders-eight-smokeless-tobacco-products>