



Study: an assessment of citizens' exposure to tobacco marketing

Final Report

Nº EAHC/2013/HEALTH/10
Nº 2014 62 03
February 2016

Consortium partners

Burson-Marsteller (B-M)

Smoke Free Partnership (SFP)

And expert subcontractors

University of Stirling

VVA Europe



**UNIVERSITY OF
STIRLING**



EUROPEAN COMMISSION

Directorate-General for Health and Food Safety
Directorate B — Health systems, medical products and innovation
Unit B.2 — Health in all policies, global health, tobacco control

E-mail: SANTE-B2-TOBACCO-CONTROL@ec.europa.eu

*European Commission
B-1049 Brussels*

Directorate-General for Health and Food Safety
Health programme

Authors

The following people contributed to the writing of this report:

Martine Stead, University of Stirling

Linda Bauld, University of Stirling

Ilze Bogdanovica, University of Nottingham

Douglas Eadie, University of Stirling

Anne Marie MacKintosh, University of Stirling

Susan Murray, University of Stirling

Kathryn Angus, University of Stirling

Nathan Critchlow, University of Stirling

Juan Miguel Rey Pino, Universidad de Granada

Pierre Hausemer, VVA Europe

Camille Wilhelm, VVA Europe

Florence Berteletti, Smoke Free Partnership

Anca Toma, Smoke Free Partnership

Jennifer Burch, Smoke Free Partnership

Rosalind Lester, Burson-Marsteller

With thanks to the following people for their assistance:

Ariadne-Beatrice Kapetanaki, University of Hertfordshire

Anna Marcinkiewicz

Fiona Angus

Susan Napier, University of Stirling

Elise Coppenolle, Burson-Marsteller

Rosalind Hunter, Burson-Marsteller

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Luxembourg: Publications Office of the European Union, 2015

ISBN 978-92-9200-684-6

doi:10.2818/7898

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1. INTRODUCTION

This report provides the European Commission with a comprehensive overview of channels through which EU citizens, and in particular young people, are exposed to the marketing of tobacco products and e-cigarettes. The study investigates the reality of tobacco advertising and marketing in a representative sample of EU Member States. The detailed evidence provided in this report will shed light on how current EU- and national- level regulation of tobacco and e-cigarette advertising is working in practice.

Exposure is measured both by looking at actual advertising spend, what advertising activity is occurring in different channels and looking at what advertising citizens recall, as measured through a citizens' survey. These are complemented by a survey of national experts and a review of secondary data. We examine exposure to advertising through a wide range of channels including print, outdoor, TV and radio, online, sponsorship and corporate social responsibility. Strategies for selling tobacco at point of sale are also assessed, including a review of the different kind of retailers, such as specialised retailers (tobacconists), retail outlets (including supermarkets) and vending machines. Where information exists, we assess the extent to which young people in particular are exposed to this marketing.

The report takes into account the regulatory context at EU and national levels, given that certain forms of advertising (e.g. billboards, point of sale) are still allowed in some Member States.

The report covers the following work packages:

- Work package 1: Overview of advertising strategies
- Work package 2: Printed media
- Work package 3: Internet and mobile applications
- Work package 4: Billboards, posters and other types of advertising outside the home
- Work package 5: TV and radio (electronic cigarettes) and product placement (all products)
- Work package 6: Points of sale, sample, giveaways and promotional items
- Work package 7: Sponsoring, corporate responsibility, brand stretching and imitation products
- Work package 8: Compilation of the key forms of advertising, promoting and sponsorship that EU citizens are exposed to.

2. EXECUTIVE SUMMARY

2.1 BACKGROUND AND PURPOSE OF THIS STUDY

The purpose of this study is to produce a comprehensive overview of channels through which EU citizens, and in particular young people, are exposed to tobacco and e-cigarette marketing.

Marketing of tobacco products is addressed through EU legislation and recommendations including, the Tobacco Advertising Directive (2003/33/EC), the Audiovisual Media Service Directive 2010/13/EU (AVMSD) (which replaced the Television Without Frontiers Directive 97/36/EC), the Tobacco Products Directive (2014/40/EU) and the Council Recommendation on the prevention of smoking and on initiatives to improve tobacco control (2003/54/EC). In addition, the European Union and its Member States are parties to the World Health Organisation's Framework Convention on Tobacco Control (FCTC) (adopted in 2003) which includes articles and guidelines covering the advertising, promotion and sponsorship of tobacco products. Individual Member States also have legislation banning tobacco advertising in various channels, although the extent and scope of this legislation varies from country to country.

2.2 METHODOLOGY

The project comprised eight work packages which together provide a complete overview of advertising strategies and citizen's exposure to tobacco and e-cigarette advertising through the following channels: printed media, internet and mobile applications, billboards, posters and other types of outside the home, TV and radio, product placement, points of sale, sample, giveaways and promotional items, and sponsorship, corporate responsibility, brand stretching and imitation products.

Approach

Marketing exposure is a complex and multi-faceted concept, which encompasses the amount of advertising activity in a given context, the reach of that advertising activity, whether consumers have an opportunity to see the advertising, and whether they recall doing so. In order to assess exposure we used two methods for which it was possible to obtain data:

- analysis of data on tobacco and e-cigarette advertising spend (the amount spent on advertising in a specific channel), which acts as a proxy measure of advertising activity.
- a survey of citizens' reported recall of advertising of different types and in different channels. This gave us an insight into the salience of advertising in different channels in different countries: what citizens remember and think they have seen.

These methods were complemented by a literature review of tobacco and e-cigarette marketing strategies, and a survey of key informants (national experts in tobacco control). The literature review summarised recent developments in tobacco and e-cigarette marketing, while the key informants' survey provided additional information not covered by the analysis of advertising spend, particularly on online marketing messages and point of sale advertising in different retail outlets. The literature review (reported in work package 1) covered marketing in all 28 member states, while the analysis of advertising spend, the citizens' survey and the key informants' survey (reported in work packages 2 to

7) were conducted in ten countries. In work package 8, conclusions were extrapolated to the whole EU.

The secondary analysis of marketing spend data, the citizens' survey and the key informants' survey were each conducted in a sample of countries:

Bulgaria (not in the citizens' survey), Denmark, France, Germany, Greece, Hungary, Lithuania, Netherlands, Poland, Portugal (citizens' survey only), Spain and the United Kingdom.

Analysis of data on advertising spend

Advertising spend data for the period mid-2013 to mid-2014 was obtained from the Advertising Expenditure Division of Kantar, "Société par Actions Simplifiée" (SAS), whom we will refer to in this report as Kantar Media or Kantar. Kantar obtained such data from a variety of different sources, including third party data providers. We did not purchase spend data as it relates to every single channel and country. For Hungary and the Netherlands, advertising on tobacco and tobacco-related products was not permitted, therefore, no advertising spend data for these countries was available.¹ In addition, the following were not monitored by Kantar between mid-2013 and mid-2014: internet advertising in Bulgaria and Greece, outdoor advertising in Greece, e-cigarette advertising in Germany, and point of sale advertising (work package 6) in any country. Further, sponsorship deals (work package 7), were not routinely monitored; however, Kantar did gather ad hoc examples of sponsorship during the relevant period. It should be stressed that not all types of advertising activity were monitored across every country and the methods for capturing advertising activity may have differed from country to country. Therefore, the completeness of coverage and comparability of data between countries are unknown.

For available data licensed from Kantar, we categorised the audience for the purchased advertising as either 'mostly adult', 'mostly youth' or 'mixed'. In order to compare the spend data meaningfully between countries with different population sizes and different media markets, we also calculated 'advertising share' – tobacco and e-cigarette advertising as a proportion of total advertising activity in each media channel and country.

Citizens' survey

An online survey was conducted of approximately 500 citizens per country (total sample n=5,526) by GFK, a professional survey and market research firm. The survey took measures of:

1. Level of usage of the media by the respondent;
2. Specific recall of tobacco advertising in these media over the past year;
3. General perceived frequency of tobacco / e-cigarette advertising in these media;
4. Where relevant, specific recall of tobacco advertising aimed at young people.

A sampling strategy was adopted to ensure socio-demographic national representativeness in terms of age (young people 15-24, and adults 25+ years), gender, education level and income level based on the most recent available census data.

¹ Other information sources indicate that e-cigarette advertising was allowed in the Netherlands in 2013.

The data analysis consisted of creating diagrams and tables for each question in the survey so as to identify the key patterns in the data. The descriptive analysis was then completed and a more in-depth analysis was conducted, using cross-tabs to investigate interesting patterns in the data. Mean frequencies of recall of tobacco and e-cigarette advertising in different types of media (e.g. print, online, TV and radio) were calculated and separated according to country, age group (15 to 24, and 25+), as well as smoking behaviour and e-cigarette use. T-tests, single factor ANOVAs and chi-squared tests were performed in order to observe significant differences of recall frequency between groups. While the main findings are present in the report, it must be noted that a more comprehensive dataset, separating the results per group (age, smoker/non-smoker and e-cigarette user/non-user), was provided to the Commission.

2.3 FINDINGS

2.3.1 WORK PACKAGE 1: OVERVIEW OF ADVERTISING STRATEGIES.

Work package 1 provided a brief review of industry marketing strategies for tobacco products (since 2012) and e-cigarettes (since 2010) in the EU, based on data and information for investors found on four main tobacco companies' websites, Euromonitor reports on trends in the tobacco market, articles published in the trade press and scientific papers and reports.

The Tobacco Advertising Directive, FCTC Recommendations and other restrictions on promotion mean that only certain marketing strategies are used by the industry, a key one being product innovation. Recent trends in product innovation include changes to pack size, type and design, slim and superslim cigarettes, capsule technology, new brands or brand variants, and additive-free cigarettes. Other strategies used include point of sale advertising (in countries where this is still permitted), pricing (particularly the use of value pricing to prevent down-trading), and corporate social responsibility.

E-cigarette marketing is generally not regulated in the EU, but will be regulated from 2016 under the Tobacco Products Directive, which will introduce a number of new requirements for e-cigarette regulation including restrictions on marketing with cross-border relevance. Marketing strategies for e-cigarettes include (depending on current restrictions in each country) paid advertising, innovative packaging and attractive design, product diversity including different flavours, product innovation, price offers, promotional discounts, and sponsorship. Some strategies target existing smokers including both those who wish to quit and those looking for an alternative to tobacco, while others have been found to have potential appeal to young people.

2.3.2 WORK PACKAGE 2: PRINTED MEDIA

Tobacco advertising exposure

The Kantar data showed that print advertising by tobacco companies had been purchased in France, Germany, Greece, Lithuania, Poland, and Spain between 2013 and 2014. All of the advertising in France and most of the advertising in Germany was in publications aimed at tobacco retailers/the

tobacco trade, while in Greece, Spain and Lithuania, all of the advertising was in publications aimed at the general public. In Poland, the advertising was divided between the two types of publication.

In the publications aimed at the general public, none of the tobacco-related advertising was for tobacco products. Instead, it comprised messages relating to counterfeit and smuggled tobacco, professional recruitment ads, corporate social responsibility (CSR) statements and sponsorship of cultural events. The majority of print publications in which this advertising had been placed were assessed as having a 'mostly adult' readership, with a small proportion defined as having a 'mixed' readership, i.e. likely to appeal to and be seen by both young people and adults.

When print advertising share was examined (the proportion of all print advertising spend in each country which was related to tobacco), the highest relative exposure of the general public to tobacco-related print advertising was in Greece, with over 2,500 euros per million euros of advertising spend. There was lower exposure in Poland and Spain, with a negligible amount of exposure in Lithuania and Germany.

In the citizens' survey there was low claimed recall of tobacco advertising in print media overall, with citizens reporting that on average they recalled seeing it between 'very rarely' and 'never'. Overall, young adults reported recalling more frequent advertising in print media than adults, except regarding magazines produced for airplanes, ships and other means of transport. Smokers recalled more frequent tobacco advertising in print media than non-smokers.

When asked if they recalled seeing tobacco advertising in specific kinds of print media, 40% of citizens claimed to recall seeing tobacco advertising at least occasionally in at least one type of print media. It is possible that citizens were confusing the types of content listed above – messages relating to counterfeit tobacco, CSR statements and so on – with advertising for tobacco products, or were thinking of advertising from several years previously (even though respondents were asked about recall in the past 12 months).

Despite this caveat, the citizens' survey data show some consistent patterning by country, with claimed recall in at least one specific type of print media being higher in countries with tobacco-related advertising expenditure compared with countries having no tobacco-related advertising expenditure. The highest *relative* exposure of the general public to tobacco-related print advertising based on the calculation of advertising share was in Greece. This is consistent with citizens in Greece claiming the highest rates of recall of tobacco advertising in print media.

E-cigarette advertising exposure

Print advertising for e-cigarettes had been purchased in publications aimed at the general public in Denmark, France, Lithuania, Poland, Spain and the UK. The majority of print publications in which advertising had been placed were assessed as having a 'mostly adult' readership, with a small proportion defined as having a 'mixed' readership. However, in Poland, a small proportion of the e-cigarette advertising was assessed as having been placed in publications with a 'mostly youth' readership. When print advertising share was examined (the proportion of all print advertising spend in each country which was related to e-cigarettes), the *highest relative exposure of the general public to e-cigarette advertising in print media was in Poland*, with nearly 3,800 euros per million euros of advertising spend, followed by the UK and Spain, with much smaller amounts in France and Denmark and a negligible amount in Lithuania.

In the citizens' survey, respondents claimed to recall seeing e-cigarette advertising 'rarely' or 'never' in print media in general. However, when asked if they recalled seeing e-cigarette advertising in

specific types of print media, 36% claimed to recall seeing it at least occasionally in at least one type of print media. Young people tended to have higher claimed recall of e-cigarette advertising in print media than did adults. Citizens' recall to some extent reflected the analysis of advertising, with citizens in the UK and Spain having relatively high levels of claimed recall of e-cigarette advertising in at least one type of print media.

However, there were also inconsistent patterns in the data, with citizens in countries with no recorded advertising spend reporting that they recalled seeing e-cigarette advertising. As with the claimed tobacco advertising recall data, it is possible that citizens may have been thinking of other types of image or message when they reported seeing e-cigarette advertising. The emerging nature of the e-cigarette market may have contributed to this possible confusion.

2.3.3 WORK PACKAGE 3: INTERNET AND MOBILE APPLICATIONS

Tobacco advertising exposure

No tobacco-related advertising spend on the internet was recorded in the Kantar data for any of the countries monitored. However, Kantar did not monitor internet advertising in Bulgaria and Greece, therefore we cannot conclude from the data whether any internet advertising occurred in those two countries. While there was no evidence of paid advertising for tobacco on the internet in the Kantar data, the key informants' survey did find a few examples of content originating from producers or retailers which appeared to promote tobacco, such as prize draws, news items about tobacco retailing, and 'corporate' content, although these were limited. The key informants also found examples of user-generated content appearing to promote specific tobacco brands and products on Facebook, which could potentially be mistaken for tobacco advertising.

In the citizens' survey, citizens claimed to recall seeing tobacco advertising rarely or never in internet and mobile media in general, which is consistent with the Kantar data and with the low levels of activity implied by the key informants' data. However, when asked if they recalled seeing tobacco advertising in at least one type of internet or mobile application, 39% claimed to recall seeing it at least occasionally in at least one type of application. At the highest end of the scale, 52% of respondents in Greece recalled tobacco advertising at least occasionally in at least one type of internet or mobile application, compared with 24% in Netherlands at the lowest end of the scale. Because internet advertising spend was not monitored in Greece, we cannot conclude whether the higher level of recall in Greece reflected actual presence of advertising. Claimed recall of tobacco advertising online may partly reflect recall of an image or message which has been mistaken for advertising, particularly content posted by other users.

The citizens' survey data suggest that young people tended to have higher claimed recall of tobacco advertising in internet and mobile media, and also higher usage of these types of media, compared with adults. This suggests that young people may be more receptive than adults to tobacco-related content on the internet, whether genuine advertising or not.

E-cigarette advertising exposure

Internet advertising for e-cigarettes, as indicated by advertising spend data, was found in Denmark, France, Lithuania, Poland, Spain and the UK. Kantar did not monitor internet advertising in Bulgaria and Greece, therefore we cannot conclude from the data whether any internet advertising for e-

cigarettes occurred in those two countries. When internet advertising share was examined (the proportion of all internet advertising in each country which was related to e-cigarettes), the highest relative exposure of the general public to internet advertising was in Poland followed by Lithuania, with the other countries having much smaller amounts of advertising share. All or most of the internet advertising for e-cigarettes in Denmark, France, Lithuania and the UK was placed on websites with 'mostly adult' or 'mixed' (likely to appeal to and be seen by both young people and adults) user profiles, while in Poland, most of the e-cigarette advertising was placed on websites categorised as having 'mostly youth' user profiles.

In the citizens' survey, citizens claimed to recall seeing e-cigarette advertising rarely or never in internet and mobile media in general. However, when asked if they recalled seeing e-cigarette advertising in at least one type of internet or mobile application, 36% claimed to recall seeing it at least occasionally in at least one type of application. At the highest end of the scale, 47% of respondents in Greece (where internet advertising spend was not monitored by Kantar) and Spain recalled e-cigarette advertising at least occasionally in at least one type of internet or mobile application, compared with 22% in Netherlands at the lowest end of the scale. The key informants' survey found e-cigarette content online which might be interpreted as advertising by citizens, such as Facebook and Twitter content posted by e-cigarette producers and retailers, TV commercials on YouTube, and e-cigarette producer and retailer profiles on professional networking sites. It is possible that some of the claimed recall of advertising reflects this.

The citizens' survey data suggest that young people tended to have higher claimed recall of e-cigarette advertising in internet and mobile media, and also higher usage of these types of media, compared with adults. This suggests that young people may be more receptive than adults to e-cigarette-related advertising content on the internet.

2.3.4 WORK PACKAGE 4: BILLBOARDS, POSTERS, AND OTHER TYPES OF ADVERTISING OUTSIDE THE HOME

Tobacco advertising exposure

Tobacco advertising spend in outdoor media was recorded in the Kantar data in Bulgaria and Germany. Kantar did not monitor outdoor advertising for Greece, and therefore we cannot conclude from the data whether any advertising occurred in Greece in the period. When advertising share was examined (the proportion of overall outdoor advertising spend which was related to tobacco), the highest relative exposure of the general public to outdoor advertising for tobacco was in Bulgaria, by a considerable margin: for every million euros spent on outdoor advertising in total, 104,703 euros were spent on tobacco advertising. In other words, just over 10% of all outdoor advertising in Bulgaria was linked to tobacco. In Germany, 6,724 euros were spent on tobacco advertising for every million euros spent on all outdoor advertising. Outdoor advertising is seen by both young people and adults.

In the citizens' survey, citizens claimed to recall seeing tobacco advertising very rarely in media outside the home in general. However, when asked if they recalled seeing advertising at least occasionally in at least one type of media outside the home, 48% claimed to recall seeing tobacco advertising. Young people tended to have higher claimed recall of tobacco advertising outside the home. At the highest end of the scale, 79% in Greece and 62% in Germany recalled seeing tobacco advertising at least occasionally in at least one type of media outside the home. The recall level in Germany can be seen as reflecting the existence of outdoor tobacco advertising in that country, as

indicated by the advertising spend data. Bulgaria (where there was a relatively high level of outdoor tobacco advertising) was not included in the citizens' survey, and as noted above, Kantar did not monitor outdoor advertising for Greece, and therefore we cannot comment on the relationship between spend and recall for those two countries.

E-cigarette advertising exposure

Advertising outdoors as indicated by advertising spend data was found in Denmark, France, Poland, Spain and the UK. Kantar did not monitor outdoor advertising for Greece, and therefore we cannot conclude from the data whether any advertising occurred in Greece in the period. When advertising share was examined (the proportion of overall outdoor advertising spend which was related to e-cigarettes), the *highest relative exposure of the general public to outdoor advertising was in the UK, closely followed by Poland*, with over 5,000 euros per million euros of outdoor advertising spend in both countries. There was lower exposure in France and Denmark, and negligible exposure in Spain.

In the citizens' survey, citizens claimed to recall seeing e-cigarette advertising very rarely in media outside the home in general. However, when asked if they recalled seeing advertising at least occasionally in at least one type of media outside the home, 39% claimed to recall seeing 39% e-cigarette advertising. At the highest end of the scale, 62% in Greece recalled seeing it at least occasionally in at least one type of media outside the home, although because outdoor advertising was not monitored by Kantar in Greece we cannot comment on any relationship between recall and exposure in that country. Levels of claimed recall of e-cigarette advertising in at least one type of media outside the home in the UK and Poland, which had the highest advertising share for e-cigarettes, were 46% and 51% respectively. This suggests there may be some relationship between exposure and recall in those countries, although the recall level was of a similar level, 46%, in Spain, where advertising share for e-cigarettes was negligible. As with recall of e-cigarette advertising in other media channels, the emerging nature of the market may contribute to some confusion.

2.3.5 WORK PACKAGE 5: TV AND RADIO (ELECTRONIC CIGARETTES) AND PRODUCT PLACEMENT (ALL PRODUCTS)

Tobacco advertising exposure

The only tobacco-related advertising spend recorded in the Kantar data for TV and radio was expenditure in Greece on radio advertising. There was no indication in the Kantar data of the nature of the radio advertising purchased by tobacco companies in Greece, although the Kantar data indicates that it was placed on channels which were predominantly classified as having a mostly adult audience. It is possible that the advertising could have comprised professional recruitment, corporate social responsibility statements, and statements about illicit tobacco or sponsorship of cultural events. Kantar did not hold information on product placement spend.

The citizens' survey did not ask about recall of tobacco advertising on TV and radio, as it was assumed there would not be any due to the widespread application of the ban on advertising in TV and radio. Respondents claimed to recall tobacco product placement very rarely or never on TV and radio. When asked if they recalled tobacco product placement at least occasionally in at least one of the six TV and radio media considered, 30% of people said that they recalled it. Without data on product placement spend, which is not held by Kantar, it is not possible to assess whether this recall was related to actual activity. Recall could have reflected simple recall of people smoking on TV and

radio, or recall of specific brands and products. There is a need for better information on product placement spend.

E-cigarette advertising exposure

The Kantar data showed that TV and radio advertising had been purchased for e-cigarettes in Bulgaria, Denmark, France, Lithuania, Poland, Spain and the UK. In Poland, the e-cigarette advertising spend was all on radio, on channels categorised as having a mixed audience (i.e. likely to appeal to both adults and young people). No information was available on the channels on which advertising was placed in the other countries. When advertising share was calculated (the proportion of overall advertising in TV and radio which was related to e-cigarettes), the highest exposure in relation to TV and radio advertising combined was in Spain, followed by France and the UK, although overall share was small in all countries.

In the citizens' survey, citizens claimed to recall e-cigarette advertising and e-cigarette product placement on TV and radio very rarely or never. When asked if they recalled e-cigarette advertising and e-cigarette product placement at least occasionally in at least one of the six TV and radio media considered, 27% recalled e-cigarette advertising and 25% e-cigarette product placement. These relatively low levels of recall appear consistent with the relatively low levels of advertising activity as reflected in the Kantar data.

2.3.6 WORK PACKAGE 6: POINTS OF SALE, SAMPLE, GIVEAWAY AND PROMOTIONAL ITEMS

Tobacco advertising exposure

There was no advertising spend data for these channels, and so the key informants' survey was used to gather information. There was considerable variability reported by key informants in where tobacco products were sold in each of the countries examined, which in part reflects different regulations regarding where tobacco can be sold. Hungary was reported to have the narrowest range of retail outlets and Germany the widest. Overall, the types of retail outlets with highest prominence of tobacco product displays and advertising, according to information supplied by key informants, were tobacconists, followed by newsagents, petrol stations, convenience stores and supermarkets. Fast-food/take-away outlets, cafes and bars, and alcohol stores in general had lower prominence of tobacco displays and advertising, and street markets had particularly low prominence in all countries apart from Bulgaria. Tobacco prominence in outdoor kiosks and mobile shops/vans was more variable, reflecting the different formats of these outlet types in different countries. Vending machines were only reported in three countries, and these tended to be visible and accessible to young people.

In the citizens' survey, advertising for tobacco in retail outlets was reportedly very rarely seen on average across all countries surveyed, although when asked if they recalled seeing tobacco advertising at least occasionally in at least one type of retail outlet, 50% of respondents did so, which is unsurprising given that tobacco is sold in at least two types of retail outlet in every country. Young people tended to recall seeing it more frequently than people over 25, as did smokers compared with non-smokers. Recall was related to how frequently people said they visited each type of retail outlet, except for large stores. Although there were some differences in reported recall between countries for some retail outlets, there did not appear to be a consistent pattern in these differences.

There was very little activity reported by key informants involving free tobacco samples, trial offers, free gifts and tobacco-related competitions and prize draws, with the exception of Germany for the latter. Consistent with this, the citizens' survey reported very low levels of recall of these types of activities. Young people did however tend to have higher recall of such activities than adults.

E-cigarette advertising exposure

The key informants reported some uncertainty regarding where e-cigarettes were sold, perhaps reflecting the fact that e-cigarettes are an evolving market with as yet little consistency in where and how products are sold and displayed. However, all informants noted the presence of specialist e-cigarette shops in their country and e-cigarettes were also fairly commonly reported as being sold in supermarkets, convenience stores, newsagents and petrol/gas stations.

In the citizens' survey, advertising for e-cigarettes in retail outlets was reportedly very rarely seen on average across all countries surveyed, although when asked if they recalled seeing e-cigarette advertising at least occasionally in at least one type of retail outlet, 41% of respondents did so. Young people tended to recall seeing it more frequently than people over 25, as did e-cigarette users compared with non-users. A strong use and recall correlation was observed in all the retail outlets considered, except for large stores (i.e. recall was related to how frequently people said they visited each type of retail outlet).

More promotional activity was reported for e-cigarettes than for tobacco products across Member States, with free samples and trial products reported as being distributed in five countries, free gifts reported as being offered in six countries, and competitions or prize draws mentioned in eight countries. However, recall of such activities in the citizens' survey was generally very low. Young people tended to have higher recall of such activities than adults.

2.3.7 WORK PACKAGE 7: SPONSORING, CORPORATE RESPONSIBILITY, BRAND STRETCHING AND IMITATION PRODUCTS

Tobacco advertising exposure

There is no routine monitoring by Kantar of tobacco sponsorship or the other activities examined in this work package. The key informants' survey reported some examples of sponsorship of music and sport events in Poland and Germany. Citizens' awareness of sponsorship, CSR and brand stretching activities was generally low, although there was an overall trend of higher awareness of such activities in Spain. Because of the lack of robust data on spend on these activities, it is not possible to assess whether there is a relationship between the higher recall in Spain and actual activity.

E-cigarette advertising exposure

There is no routine monitoring by Kantar of e-cigarette sponsorship or the other activities examined in this work package. The key informants' survey reported some examples of sponsorship of music and sport events in a few countries. Citizens' awareness of sponsorship and CSR activities was generally low, although there was an overall trend of higher awareness of such activities in Spain. Because of the lack of robust data on spend on these activities, it is not possible to assess whether there is a relationship between the higher recall in Spain and actual activity.

2.3.8 WORK PACKAGE 8: CONCLUSIONS REGARDING THE KEY FORMS OF ADVERTISING, PROMOTING AND SPONSORSHIP TO WHICH EU CITIZENS ARE EXPOSED

The evidence presented in this report suggests that, in general, tobacco advertising restrictions are well-enforced. There is little recorded advertising spend in traditional channels for tobacco in those areas where it is prohibited and citizens' recall of such activity is correspondingly low. There are however some gaps in the restrictions (outdoor advertising, CSR statements and sponsorship of local events), which means that citizens are still exposed to a certain level of tobacco marketing. In the absence of traditional advertising, product innovation including packaging also remains an important means to attract consumers.

The evidence presented in this report also suggests that the current extent of advertising, marketing and promotion of e-cigarettes varies very widely between Member States. There appears to be little or no such activity in some countries, while in others, e-cigarettes are widely advertised through print, internet, outdoor and TV and radio advertising.

3. BACKGROUND AND POLICY CONTEXT

Tobacco use remains the single largest cause of preventable disease and mortality in the European Union, with almost 700,000 people dying of tobacco-related causes every year [1].

The EU and the Member States have therefore placed a high priority on legislative action to regulate the tobacco industry and its supply chain, with a view to reducing tobacco consumption and the accompanying burden of tobacco-related disease and premature death. The EU and the Member States have also led global negotiations on tobacco control policy, through the World Health Organisation's Framework Convention on Tobacco Control.

Another important topic on the EU agenda has been e-cigarettes and their fast growing popularity. The revised Tobacco Products Directive introduces harmonised regulation of e-cigarettes at EU level. This includes specific rules on advertising and cross border distance sales.

Below we provide a synthesis of the relevant EU recommendations and legislation, international commitments and Member State implementation. The relevant texts are included for reference at Annex 1.

3.1 EU LEGISLATION

The EU Directive on the advertising and sponsorship of tobacco products (2003/33/EC) prohibits tobacco advertising with cross-border relevance, such as in press, radio or on the internet, as well as sponsorship of events of a cross border character (sports, concerts, festivals). The Directive does not apply to local or national advertising within Member States (for example on billboards). Member States can decide themselves how to regulate such advertising.

The Audiovisual Media Service Directive 2010/13/EU (AVMSD) (which replaced the Television Without Frontiers Directive 97/36/EC) bans the advertising of tobacco products on television and on-demand services. Product placement of tobacco in audiovisual media services is also prohibited.

The Tobacco Products Directive (2014/40/EU) regulates cross-border promotion of e-cigarettes in a similar manner to the Tobacco Advertising Directive and the AVMSD. Advertising in print, online and audiovisual media is prohibited, as well as sponsorship of events with a cross-border character. The transposition deadline of the Directive is May 2016.

The Council Recommendation on the prevention of smoking and on initiatives to improve tobacco control (2003/54/EC) recommended that Member States prevent tobacco sales to children and adolescents, by various means including removing tobacco products from self-service displays in retail outlets, and restricting access to tobacco vending machines to people of legal age to buy such products. Regarding advertising and promotion, it recommended that Member States prohibit the use of tobacco brand names on non-tobacco products or services; promotional items and tobacco samples; the use and communication of sales promotions, including discounts and free gifts; outdoor advertising (such as billboards and posters) and advertising in cinemas of tobacco products; and any other forms of advertising, sponsorship or promotion designed to promote tobacco products.

International Commitments

The European Union and its Member States are parties to the **World Health Organisation's Framework Convention on Tobacco Control (FCTC)** (adopted in 2003).

Article 13 of the FCTC covers the advertising, promotion and sponsorship of tobacco products. It requires Parties to implement a "comprehensive ban" on all tobacco advertising, promotion and sponsorship. These obligations are subject to the individual Party's "constitution or constitutional principles": where required prohibitions are not possible in a Party's jurisdiction for constitutional reasons, the FCTC requires "restrictions" on relevant activities.

"As a minimum" Parties must prohibit any "false, misleading or deceptive" tobacco advertising; require that any advertising that is permitted includes appropriate health and other warnings; and prohibit tobacco sponsorship of international events, activities, or participants in such events or activities.

Guidelines relating to FCTC Article 13 were adopted in 2008. The Guidelines state that tobacco advertising, promotion and sponsorship (TAPS) increase tobacco use whilst comprehensive bans on TAPS decrease tobacco use. Furthermore, a comprehensive ban on TAPS would apply to "all forms of commercial communication, recommendation or action and all forms of contribution to any event, activity or individual with the aim, effect, or likely effect of promoting a tobacco product or tobacco use either directly or indirectly."

The Guidelines also outline that contemporary marketing involves an integrated approach to advertising and promoting goods. Therefore, if Parties only ban or restrict certain specific forms of direct tobacco advertising, then the tobacco industry will simply shift to other creative advertising, promotion and sponsorship strategies, directed especially at young people. Moreover, the Guidelines recommend the prohibition of public education campaigns funded or directed by the tobacco industry (specifically mentioning "youth smoking prevention campaigns"), contributions by the tobacco companies to "socially responsible causes" as well as publicity given to "socially responsible business practices" by the tobacco industry.

3.2 NATIONAL LEGISLATION IN MEMBER STATES ON LOCAL TOBACCO ADVERTISING, PROMOTION AND SPONSORSHIP

According to the WHO Europe tobacco control database which provides regularly updated information on tobacco advertising, promotion and sponsorship in the WHO European Region:

- (1) 10 out of 28 EU Member States have a ban on tobacco advertising and promotion at point of sale
- (2) 18 out of 28 EU Member States have banned promotional discounts, and 24 out of 28 have banned product placement
- (3) 13 out of 28 EU Member States have banned tobacco vending machines
- (4) 25 out of 28 Member States have banned indirect tobacco advertising and promotion through the appearance of tobacco products in TV and/or films.
- (5) 4 out of the 28 Member States have Points of sale display bans (POSDB) Points of sale display bans (POSDB): Tobacco display bans are in place in 4 EU countries: Croatia (display

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of tobacco products banned from 1 July 2014), Ireland (first country in the EU to implement a display ban - came into effect on 1 July 2009), Finland (from 1 January 2012) and the United Kingdom (in England, the retail display ban for large shops (over 280 sq m) came into force on 6 April 2012 and for smaller shops on 6 April 2015; in Northern Ireland, the retail display ban for large shops (over 280 sq m) came into force on 31 October 2012 and for smaller shops on 6 April 2015; in Scotland, the retail display ban for large shops (over 280 sq m) came into force on 29 April 2013 and for smaller shops on 6 April 2015 and in Wales, the retail display ban for large shops (over 280 sq m) came into force on 3 December 2012 and for smaller shops on 6 April 2015). The implementation differs, but the ban in most jurisdictions mandates that shops and stores that sell tobacco products keep the products out of sight of customers, under the counter, or in special cabinets. Tobacco products can only be shown on request from customers.

3.3 CURRENT REGULATIONS CONCERNING THE MARKETING OF TOBACCO PRODUCTS IN THE EU

A summary of current Member State regulations of tobacco products is provided in table 3.3.1 below.

All Member States have introduced a ban on cross-border tobacco advertising and sponsorship in the media other than television in accordance with the Tobacco Advertising Directive (2003/33/EC). The ban covers print media, radio, internet and sponsorship of events, such as the Olympic Games and Formula One races; free distribution of tobacco should be banned in such events. The Audiovisual Media Service Directive (**2010/13/EU**) bans the advertising of tobacco products on television and on-demand services, and product placement. In addition, it is worth noting that the Tobacco Products Directive (2014/40/EU) lays down rules governing the marketing of e-cigarettes. This will mean that, by May 2016, e-cigarette manufacturers will have to comply with parallel rules on cross-border advertising.

Table 3.3.1: Local marketing of tobacco products outside shops and inside retail outlets²

Country	Billboard and outdoor advertising	Free samples and giveaways	Other types of promotions	Vending machines indoors and outdoors	Points of sale	
					Displays	Advertising
Austria	Banned [2]	Permitted [2]	Cross-branding (i.e. use of tobacco products brands on other products) are legal, and corporate social responsibility activities of tobacco industry are not restricted [2]	Permitted Sales in 2012 through vending machines accounted for about 10% of total cigarette volume sales (Euromonitor) [3]	No display ban	According to Euromonitor point-of-sale advertising has been the only way tobacco products can be advertised since 2007, and health warning has to be clearly displayed on these adverts [4]

² Information in this table was collected from a search of published sources (references to each source are given in the table). The information was correct to the best of the researchers' knowledge as of January 2015".

EUROPEAN COMMISSION

Country	Billboard and outdoor advertising	Free samples and giveaways	Other types of promotions	Vending machines indoors and outdoors	Points of sale	
					Displays	Advertising
Belgium	Banned [5]	Banned [5]	Product placement is banned, but brand stretching and appearance of tobacco in films/ TV is permitted. Corporate Social Responsibility (CSR) activities are banned [5]	Permitted [6]	No display ban	Advertising is permitted [5]
Bulgaria	Permitted [7]- brand names if it does not say that it is a cigarette brand [8]	Permitted [7]	There is ban on product placement but not on CSR or brand stretching [7]	Banned [7]	No display ban	Permitted [7]
Cyprus	Banned [9]	Banned [9]	Brand stretching is banned under general advertising restrictions although law does not explicitly refer to brand stretching. CSR activities are not banned [9]	Banned [9]	No display ban	Advertising at PoS is banned [9]

EUROPEAN COMMISSION

Country	Billboard and outdoor advertising	Free samples and giveaways	Other types of promotions	Vending machines indoors and outdoors	Points of sale	
					Displays	Advertising
Croatia	Banned [10]	Banned [10]	CSR activities are permitted; brand stretching does not allow use of tobacco brand names on non-tobacco products but not the other way around [10]	Permitted [10]	Banned [11]	PoS advertising is banned [10]
Czech Republic	Banned [12]	Banned [12]	Brand stretching and CSR activities are permitted [12]	Permitted [12]	No display ban	PoS advertising is permitted [12]
Denmark	Banned [13]	Banned [13]	CSR activities are permitted; brand stretching does not allow use of tobacco brand names on non-tobacco products but not the other way around [13]	Permitted only inside pubs, nightclubs, restaurants and hotels [14]	No display ban	PoS advertising is permitted [13]

EUROPEAN COMMISSION

Country	Billboard and outdoor advertising	Free samples and giveaways	Other types of promotions	Vending machines indoors and outdoors	Points of sale	
					Displays	Advertising
Estonia	Banned [15]	Banned [15]	Brand stretching and CSR activities are permitted; product placement and appearance in TV/films is permitted [15]	Banned [15]	No display ban	PoS advertising is permitted [15]
Finland	Banned [16]	Banned [16]	CSR activities are permitted; brand stretching does not allow use of tobacco brand names on non-tobacco products but not the other way around [16]	Banned [16]	Banned since 2012 [17]	PoS advertising is banned [16]
France	Banned [18]	Banned [18]	CSR activities are permitted; brand stretching is limited as tobacco brand names are not allowed on non-tobacco products. Product placement is banned [18]	Banned [19]	No display ban	Permitted [18] inside tobacconists or tobacco specialists and not visible from outside the shop [20]
Germany	Permitted [21]	Permitted [21]	No restrictions on brand stretching and CSR [21]	Permitted [21]	No display ban	Permitted [21]

EUROPEAN COMMISSION

Country	Billboard and outdoor advertising	Free samples and giveaways	Other types of promotions	Vending machines indoors and outdoors	Points of sale	
					Displays	Advertising
Greece	Banned [22]	Banned since 2009. However, companies are still permitted to distribute smoking paraphernalia at point of sale as a promotional activity [22 23]	CSR and brand stretching is permitted [22]	Banned [22]	According to Article 2 of LAW NUMBER 3730 on the Protection of minors from tobacco and alcoholic beverages and other provisions – 23 December 2008, the placement of tobacco products is prohibited in displays of shops, excluding duty free shops, kiosks and shops which sell exclusively tobacco products. However, according to key informants, tobacco products are place in such a way that they are still visible to customers even if placed behind the counter (mainly because the products are placed behind a window) [23].	Permitted [22]

EUROPEAN COMMISSION

Country	Billboard and outdoor advertising	Free samples and giveaways	Other types of promotions	Vending machines indoors and outdoors	Points of sale	
					Displays	Advertising
Hungary	Banned [24]	Banned [24]	CSR is permitted; brand stretching is banned [24]	Banned [24]	No display ban	Permitted [24] though some restrictions apply- adverts cannot be visible from outside, advertising can only display name and price of the product and its nicotine, tar and carbon monoxide content and 30% of the total surface must be covered by health warnings; it is illegal to portray young people or celebrities or depict anyone smoking; adverts must not contain sound effects or moving images, and must not give any kind of positive impression of smoking [25]

EUROPEAN COMMISSION

Country	Billboard and outdoor advertising	Free samples and giveaways	Other types of promotions	Vending machines indoors and outdoors	Points of sale	
					Displays	Advertising
Ireland	Banned [26]	Banned [26]	CSR and brand stretching is permitted [26]	Permitted [26]	Banned	Banned [26]
Italy	Banned [27]	Permitted [27]	CSR and brand stretching is permitted [27]	Permitted [27]	No display ban	Banned [27]
Latvia	Banned [28]	Permitted [28]	CSR and brand stretching is permitted [28]	Banned [28]	No display ban	Permitted [29]
Lithuania	Banned [30]	Banned [30]	CSR is permitted. It is banned to use tobacco brand names on non-tobacco products but not vice versa [30]	Banned [30]	No display ban	Permitted [30] though some restrictions apply as only brand names, words "We trade in", "We sell", nicotine tar and carbon monoxide yields and indication of price can be presented [31]

EUROPEAN COMMISSION

Country	Billboard and outdoor advertising	Free samples and giveaways	Other types of promotions	Vending machines indoors and outdoors	Points of sale	
					Displays	Advertising
Luxembourg	Permitted [32]	Banned [32]	CSR and brand stretching is permitted [32]	Permitted [32]	No display ban	Permitted [32]
Malta	Banned [33]	Permitted [33]	Brand stretching is banned; CSR is permitted [33]	Permitted [33]	No display ban	Banned [33]
Netherlands	Banned [34]	Banned [34]	Brand stretching and CSR is permitted [34]	Permitted [34]	No display ban	Permitted [34]- advertising is restricted to packaging of products and near place where tobacco products are placed [35]
Poland	Banned [36]	Banned [36]	Brand stretching and CSR is permitted [36]	Permitted only in duty free shops [36]	No display ban	Permitted [37]
Portugal	Banned [38]	Banned [38]	Brand stretching and CSR is permitted [38]	Permitted [38]	No display ban	Permitted- with mandatory health warning [39]

EUROPEAN COMMISSION

Country	Billboard and outdoor advertising	Free samples and giveaways	Other types of promotions	Vending machines indoors and outdoors	Points of sale	
					Displays	Advertising
Romania	Banned [40]	Permitted [40]	It is banned to use tobacco brand names on non-tobacco products but not vice versa. CSR is permitted [40]	Banned [40]	No display ban	Permitted [40]
Slovakia	Banned [41]	Banned [41]	CSR and brand stretching is permitted [41]	Banned [41]	No display ban	Permitted [41]
Slovenia	Banned [42]	Banned [42]	It is not permitted to use brand names of non-tobacco products on tobacco products but not vice versa; CSR is permitted [42]	Banned [42]	No display ban	Permitted [42]
Spain	Banned [43]	Banned [43]	Brand stretching is banned; CSR is permitted [43]	Permitted [43]	No display ban	Permitted inside shops [44]
Sweden	Banned [45]	Banned [45]	CSR and brand stretching is permitted [45]	Permitted [45]	No display ban	Permitted [45]

EUROPEAN COMMISSION

Country	Billboard and outdoor advertising	Free samples and giveaways	Other types of promotions	Vending machines indoors and outdoors	Points of sale	
					Displays	Advertising
UK	Banned [46]	Banned [46]	Brand stretching is banned; CSR is permitted [46]	Banned [46]	Banned (allowed in small shops until April 2015)	Banned (allowed in small shops until April 2015) [47]

3.4 INFORMATION SOURCES

The research undertaken in the context of this report mainly relates to the legal obligations in the EU, but is conducted from a global perspective and should be understood within a wider context of political commitment at national, EU and international level.

A particular challenge with this study was that no single measure of marketing exposure exists. Exposure is a complex and multi-faceted concept, which encompasses the amount of advertising activity in a given context, the reach of that advertising activity, whether consumers have an opportunity to see the advertising, and whether they recall doing so. In this study, we used two measures for which it was possible to obtain data:

- Secondary data on tobacco and e-cigarette advertising spend (the amount spent on advertising in a specific channel), which acts as a proxy measure of advertising activity. In order to compare the spend data meaningfully between countries with different population sizes and different media markets, we also calculated 'advertising share' – tobacco and e-cigarette advertising as a proportion of total advertising activity in each media channel and country.
- Primary data on citizens' reported recall of advertising of different types and in different channels. This gave us an insight into the salience of advertising in different channels in different countries: what citizens remember and think they have seen.

Both of these measures have some limitations, which we discuss in more detail in the Methodology section 4 below. They are complemented by a survey of national experts (key informants) and a review of secondary data. When taken in combination, they give us a multi-dimensional insight into exposure in the different channels and countries.

4. METHODOLOGY

4.1 OVERVIEW OF METHODS

The study adopts a mixed methods approach to examine how EU citizens, in particular young people, are exposed to tobacco and e-cigarette marketing. Four methods were used:

- A rapid literature review;
- Secondary analysis of marketing spend data in ten countries;
- A representative citizens' survey of roughly 500 adults (aged 18+) in ten countries;
- Key informants' survey of legislation, compliance, tobacco and e-cigarette marketing point of sale practices.

The secondary analysis of marketing spend data, the citizens' survey and the key informants' survey were each conducted in a sample of countries:

Bulgaria (not in the citizens' survey), Denmark, France, Germany, Greece, Hungary, Lithuania, Netherlands, Poland, Portugal (citizens' survey only), Spain and the United Kingdom.

These countries were selected on the basis of the following criteria:

- Suitable spread in terms of geographical and cultural location across Europe: Baltic, central, eastern, Nordic, southern and western European countries are all represented;
- Some of the biggest countries in Europe in terms of population size are represented (Germany, France, UK, Spain, Poland), aiding the extrapolation of results to the whole EU population;
- Clear variation with regard to their national policies on tobacco control and e-cigarettes, including different levels of restrictions on tobacco advertising and varied approaches to e-cigarette availability and promotion;
- Varied levels of smoking prevalence;
- Our team has links to networks in these countries to facilitate data collection.

Each method is described below in detail.

4.2 LITERATURE REVIEW

This comprised a rapid review of the literature on the nature and type of promotional activities undertaken to market tobacco and e-cigarettes in the EU. The review was intended to underpin and provide a context for work packages (WP) 2 to 7, which examined specific media channels in detail.

The rapid review comprised a desk-based search of a range of publication types covering the time period including January 2012 to 1 October 2014 for tobacco, and earlier (January 2010 to 1 October 2014) for e-cigarettes. The decision was taken to examine e-cigarette marketing from 2010 because these are new products and the marketing has evolved fairly rapidly. Because tobacco marketing strategies have remained relatively stable over the past few years it was decided only necessary to examine literature since 2012. The aim was to identify and describe elements of the 'marketing mix' (the marketing tools used by companies, typically involving product design, packaging, promotions, pricing and the distribution network) used to increase tobacco and e-cigarette sales and consumption.

The literature review contributed to:

- WP1 (Overview of industry marketing strategies, summary of Member States' (MS) legislation on marketing, and evidence of sales to minors);
- WP3 (Overview of main types of online marketing channels and messages used in MS);
- WP6 (Summary of available evidence on point of sale (PoS) displays in MS, how these are used for marketing purposes);
- WP7 (Descriptive overview of main types of sponsorship, Corporate Social Responsibility (CSR), brand stretching and imitation product activities in countries where such data are available).

Search methods

The resources and publication types searched included:

Academic databases and other academic sources: These include PubMed (a database of medical and public health academic literature); Business Source Premier (a business, management and economics database containing academic journals and trade publications); and the Web of Science Conference Proceedings Citation Indices (includes academic studies that may not be published in academic journals but have been presented at conferences). The journal *Tobacco Control* was also searched. Academic studies can provide description and analysis of marketing techniques and also evidence on the links between tobacco marketing approaches and techniques, and smoking behaviour and attitudes (particularly of young people).

Other online sources: Two global databases were searched:

WARC: World Advertising Research Center (provides articles and case studies on advertising, marketing, brands and campaigns);

Euromonitor International reports (provide data on recent global trends and innovations). The UK Centre for Tobacco and Alcohol Studies, of which the University of Stirling is a network member, holds a subscription to Euromonitor.

Published reports and 'grey' (unpublished) literature: These included reports such as 'The marketing of the Electronic Cigarettes in the UK' (de Andrade et al., 2013), the 'Rapport et avis d'experts sur l'e-cigarette' (Office français de prévention du tabagisme, 2013), and other relevant reports identified during searches.

Industry websites: Sources included annual reports and presentations from the major tobacco companies' websites (Philip Morris International, Japan Tobacco, Imperial Tobacco, British American Tobacco), and major e-cigarette companies websites.

In-country trade media: These are periodicals produced for the tobacco and e-cigarette manufacturing industries; for retailers of tobacco and e-cigarettes such as newsagents, convenience stores and petrol/gas stations; and for marketing and PR agencies engaged by manufacturers to promote them. They give an insight into both the ways in which tobacco and e-cigarettes are promoted and incentivised to retailers to stock in their stores, and the ways the products are promoted to the consumers. Relevant industry sectors were searched in the Nexis® database (a searchable database of news articles).

The table below summarises the searches conducted in each category and the results of the searches.

Table 4.2.1. Summary of literature review searches and results

Type of information	Sources	Results to assess
Academic databases and other academic sources	PubMed (a database of medical literature)	125 titles/abstracts for papers published 2010-2014 were identified as potentially addressing tobacco and e-cigarette marketing techniques in all current EU Member States, and were assessed for relevant data
	Business Source Premier (a business, management and economics database containing academic journals and trade publications)	396 titles/abstracts were evaluated (as above) for relevant data
	Web of Science Conference Proceedings Citation Indices (includes academic studies that may not be published in academic journals but have been presented at conferences)	37 titles/abstracts were evaluated (as above) for relevant data
	Tobacco Control (produced by the publishers of the <i>British</i>	38 'News Analysis' sections were

Type of information	Sources	Results to assess
	<i>Medical Journal</i>): search of its 'News analysis' sections and its blog on the website http://tobaccocontrol.bmj.com	evaluated (as above) for relevant data
Other online sources	WARC: World Advertising Research Center (provides articles and case studies on advertising, marketing, brands and campaigns)	All content under Topic 'Tobacco' published 2010-2014 (17 hits) was evaluated (as above) for relevant data (please note this includes e-cigarettes).
	Reports by Euromonitor International Ltd , a business intelligence company whose purpose is to provide market research, business intelligence reports and data to industry	145 documents were evaluated (as above) for relevant data
Published reports	A targeted search for data on individual marketing strategies from WPs 3, 6 and 7 using Google's search engine to identify any published and grey literature from each European country (sample search: "brand stretching" "e-cigarette" Bulgaria OR Denmark OR France OR Germany OR Hungary OR Lithuania OR Netherlands OR Poland OR Spain OR UK OR "United Kingdom")	The first 50 hits (sorted by relevance) for each search were scanned for relevant reports
	A search of in-house files for relevant literature and scanning of bibliographies of the reports and literature already collected for further relevant items	Four relevant reports were identified. WHO country reports were also used for information on legislation
	Annual reports and presentations from the major tobacco companies' websites (Philip Morris International, Japan Tobacco, Imperial Tobacco, British American Tobacco)	49 documents were retrieved from the four websites

Type of information	Sources	Results to assess
Industry websites	Retail magazines published in the UK	Hand-searches of four UK retail magazines (<i>The Grocer</i> , <i>Forecourt Trader</i> , <i>Convenience Store</i> , <i>Off Licence News</i>) for articles summarising the tobacco and e-cigarette categories for retailers over the last 5 years. ('Focus on...' category articles were generally produced between 1 and 4 times per year in each publication) Online search of retail news site <i>TalkingRetail.com</i> for relevant news items
In-country trade media	A hand-search of paper issues of three trade periodicals produced by/for the tobacco and e-cigarette manufacturing industries	A sample of 3 issues from each year (2010-2014) of the monthly <i>Tobacco Reporter</i> and bimonthly <i>Tobacco Journal International</i> , and 3 issues of <i>Vapor Voice</i> (issue one of this periodical was first published in 2014) were hand-searched for relevant articles
	A targeted search for trade press for electronic cigarettes in the Nexis® database : limited to Europe, Jan 2010-Oct 2014, in the following industries: Arts & Entertainment Computing & Information Technology Information Services Internet & WWW Marketing & Advertising Media & Publishing Retail & Wholesale Sports & Recreation	Number of results returned: English 263, German 3, Italian 11, Spanish 23, French 81 and Portuguese 1, were identified as potentially relevant to e-cigarette marketing techniques in all current EU Member States, and were assessed for relevant data
	A targeted search for data on underage access to tobacco and e-cigarettes in the Nexis®	183 results (all in English) were evaluated for relevant data on underage

Type of information	Sources	Results to assess
	database: limited to European News, all Languages, last 5 years file (sample search: ((test w/1 purchase*) AND (tobacco OR cigarette\$) AND (underage OR minor* OR child*)))	access to tobacco and e-cigarettes

Notes to table: there were multiple duplications across searches within the same category. Some searches were not intended to be comprehensive, but to be selective, to attempt to find data where there were gaps (e.g. the Google searches and the Nexis e-cigarettes searches).

Analysis and synthesis

Findings were analysed and presented in a thematic narrative synthesis.

4.3 SECONDARY ANALYSIS OF ADVERTISING SPEND DATA

Overview and aims

The aim of this strand of the study was to collect and analyse data which would provide a quantifiable measure of citizens' potential exposure to advertising for tobacco and e-cigarettes, in media channels relevant to the work packages.

Advertising expenditure data record what advertising has been purchased in particular product categories and media channels over a given time period, and the cost of that advertising. Such data can be purchased from advertising and media monitoring agencies.

Selection of data for purchase

The consortium contacted a range of organisations to identify what data were potentially available on the extent and nature of tobacco and e-cigarette marketing in the EU. Each organisation was sent a list of key questions relating to the tender specifications, focusing particularly on marketing spend data and on whether information was available on the audiences exposed to the advertising.

On the basis of our enquiries, the organisation which we judged mostly likely to be able to provide relevant data was Kantar Media. Kantar collect and/or receive data on marketing spend on tobacco and e-cigarette advertising and promotion, including information on the companies, brands, product categories, products, and type of media used for promotion (i.e. print, internet, outdoor, TV & radio), the month and year in which advertising was purchased, and the 'Rate Card' cost of each advertisement. The 'Rate Card' cost is the publically available official cost of the advertisement, without taking into consideration any specific discounts that would be offered to a specific advertiser or agency (such discounts are confidential, and not recorded in the data). Kantar reported that they had data for both tobacco advertising media spend (in the categories where this was allowed, i.e. on billboards in Germany) and e-cigarette advertising media spend.

Kantar also collect and/or receive data, where available, on ‘media vehicle’ – i.e. the publication title, website or TV/radio station on which advertising was purchased. Through discussion with the Commission, it was decided that media vehicle data would be useful as this would potentially allow us to assess the types of audiences exposed to the advertising. Kantar also collect and/or receive actual examples of the advertising placed (for example, copies of billboard posters and print ads). Again, it was felt in discussion with the Commission that it would be useful to purchase a selection of these examples, as this would enable us where relevant to describe the nature of the advertising to which citizens are exposed.

A detailed specification outlining the data to be purchased from Kantar was drawn up. In summary this specified:

General parameters:

- Time period: Advertising spend data for the period Jul 2013-Jun 2014.
- Product categories: Tobacco products and e-cigarettes.
- Countries: Bulgaria, Denmark, France, Germany, Greece, Lithuania, Poland, Spain, UK.

Media channels and breakdowns:

- Print: All available advertising spend data.
- The data broken down by media vehicle (i.e. the publication in which the ad was placed) for all the countries and product categories where there is data for print advertising, and where the data on media vehicle was available.
- All available creatives (copies of actual ads) for print advertising for tobacco-related products for Spain and Greece, plus a sample of creatives for other countries, for both tobacco and e-cigarettes.
- Internet: All available advertising spend data.
- The data broken down by media vehicle (i.e. the website on which the ad was placed) for all the countries and product categories where there is data for internet advertising, and where data on media vehicle was available.
- All available creative (examples of actual ads) for internet advertising for tobacco-related products for Spain and Greece.
- Outdoor: All available advertising spend data.
- TV and radio: All available advertising spend data.

Description of the data received

The advertising spend data received from Kantar comprised Excel spreadsheets, one per country, listing the 'rate card' price of all advertisements purchased, for both tobacco and e-cigarette products where relevant, in the four media channels where relevant.

For Hungary and the Netherlands³, advertising on tobacco or tobacco related products was not permitted during the relevant period, therefore no data was available for these countries..

Regarding the data for the other nine countries, several important points should be made:

- Kantar monitoring did not cover every media channel in every country. Internet advertising was not monitored in Bulgaria or Greece, and no advertising activity for tobacco or tobacco related products was available for outdoor in Greece.
- Data were not provided on e-cigarette advertising in any channel in Germany as Kantar said they had not recorded any activity in this category. Enquiries made by the academic team suggested that there may have been some isolated instances of e-cigarette advertising on the internet during the study period.
- Attempts were made by Kantar and by the academic team to locate additional monitoring data where it was suspected that some advertising activity might have occurred which was not monitored or recorded by Kantar, but we were not able to find relevant information.
- Kantar noted that print advertising activity was recorded in Greece for e-cigarettes but not during the period of interest to the study.
- Media vehicle information was only purchased for Print and Internet.

³ Other information sources indicate that e-cigarette advertising was allowed in the Netherlands in 2013.

The tables below summarise the categories in which data were available for each country.

Table 4.3.1: Available spend data by country: tobacco advertising spend

Country	Print	Internet	Outdoor	TV & Radio
Bulgaria	<i>No activity recorded</i>	<i>Spend data not monitored</i>	Yes	<i>No activity recorded</i>
Denmark	<i>No activity recorded</i>	<i>No activity recorded</i>	<i>No activity recorded</i>	<i>No activity recorded</i>
France	<i>No activity recorded</i>	<i>No activity recorded</i>	<i>No activity recorded</i>	<i>No activity recorded</i>
Germany	Yes Including publication title	<i>No activity recorded</i>	Yes	<i>No activity recorded</i>
Greece	Yes Including publication title	<i>Spend data not monitored</i>	<i>Spend data not monitored</i>	Yes Including name of radio channel
Hungary	No monitoring permitted			
Lithuania	Yes Including publication title	<i>No activity recorded</i>	<i>No activity recorded</i>	<i>No activity recorded</i>
Netherlands	No monitoring permitted ⁴			
Poland	Yes Including publication title	<i>No activity recorded</i>	<i>No activity recorded</i>	<i>No activity recorded</i>
Spain	Yes Including publication title	<i>No activity recorded</i>	<i>No activity recorded</i>	<i>No activity recorded</i>
UK	<i>No activity recorded</i>	<i>No activity recorded</i>	<i>No activity recorded</i>	<i>No activity recorded</i>

⁴ Other information sources indicate that e-cigarette advertising was allowed in the Netherlands in 2013.

Table 4.3.2: Available spend data by country: e-cigarette advertising spend

Country	Print	Internet	Outdoor	TV & Radio
Bulgaria	<i>No activity recorded</i>	<i>Spend data not monitored</i>	<i>No activity recorded</i>	Yes
Denmark	Yes Including publication title	Yes Including name of website	Yes	Yes
France	Yes Including publication title	Yes Including name of website	Yes	Yes
Germany	<i>No activity recorded</i>	<i>No activity recorded</i>	<i>No activity recorded</i>	<i>No activity recorded</i>
Greece	<i>No advertising spend recorded in the specific period, but it was noted that advertising did occur outside the period</i>	<i>Spend data not monitored</i>	<i>Spend data not monitored by Kantar</i>	<i>No activity recorded</i>
Hungary	Not monitored by Kantar because not permitted			
Lithuania	Yes Including publication title	Yes Including name of website	<i>No activity recorded</i>	Yes
Netherlands	Not monitored by Kantar because not permitted ⁵			
Poland	Yes Including publication title	Yes Including name of website	Yes	Yes Including name of radio channel
Spain	Yes Including publication title	<i>No activity recorded</i>	Yes	Yes
UK	Yes Including publication title	Yes Including name of website	Yes	Yes

In addition to the advertising spend data, Kantar supplied a database of 'creative samples' (copies of print ads, stills from internet video ads) for both tobacco and e-cigarette advertising for Denmark, France, Germany, Greece, Lithuania, Poland, Spain and UK. This did not necessarily represent all the advertising material over the study period, but did enable us to describe the different types of advertising found in the countries concerned.

⁵ Other information sources indicate that e-cigarette advertising was allowed in the Netherlands in 2013.

Data processing and analysis

The data processing and analysis involved the following steps:

1. *Re-categorisation.* How the advertising spend data were categorised in the original spreadsheets varied from country to country. For example, in Bulgaria, both tobacco products and e-cigarettes were categorised in the original spreadsheet as 'Tobacco', while in the Polish data, some items were categorised neither as tobacco nor e-cigarettes, but under generic labels such as 'wholesalers and shops' or 'product range' or 'other'. These inconsistencies in categorisation meant that it was not immediately possible to identify which advertising related to tobacco and which to e-cigarettes. The first step was therefore to search for information on the advertiser and the product being advertised to identify the nature of the product, and to re-categorise accordingly. This was done for each country where there was any ambiguity about the nature of the products described.

2. *Analysis of media vehicle information.* As described above, the advertising spend spreadsheets provided information on where the advertising was placed: the name of the print publication title, the name of the website, and, to a limited extent, the name of the radio channel. The next step in the analysis was to generate a short descriptor for each media vehicle listed. We were interested in three dimensions:

- (a) whether the media vehicle was one to which the general public could be exposed, or whether it was one to which only retailers/trade representatives would be exposed. Tobacco advertising is permitted in publications which are aimed at retailers/trade (for example, magazines for grocery store owners), and, while it is not impossible that general public might see such advertising, in general it is likely that general public exposure to such advertising is very low;
- (b) the nature of the media vehicle (the type of magazine, newspaper, website or broadcast channel);
- (c) for all print publications, websites and radio channels to which the general public were exposed, the likely nature of that audience: whether it was likely to be a mostly adult audience, a mostly youth audience, or a 'mixed' audience (i.e. both adults and youth). For this assessment, 'mostly adult' was defined as over 25 years of age, 'mostly youth' as up to 25 years of age, and 'mixed' was defined as having both an adult and youth audience.

The process for assessing these dimensions was as follows:

- A member of the research team with relevant language skills for each country looked for information on each publication title, website or radio channel. For example, for print publications, this would include visiting the website of the print publication (if there was one), and checking if there was a Wikipedia entry describing the print publication; for websites it would involve visiting the website itself to assess its nature and content. In some cases we were already familiar with the item in question (for example, well-known national newspapers). We then generated a short descriptor of its nature and content based on this information: for example, 'national tabloid newspaper', 'TV/entertainment magazine', 'computer games website', 'local radio station'.
- The potential audience for each print publication was assessed by a member of the research team with relevant language skills making an expert judgment based on a set of criteria relating to the content, imagery, the types of people featured in the publication and other

indicators of likely readership. In some cases, supplementary information was available from secondary sources: for example, the Wikipedia entry for print publications sometimes includes information on a publication's readership profile.

- For websites, we investigated the potential to use website analytics programmes to generate information on the demographics of each website's user profile. We conducted a small pilot using four of the most widely available analytics programmes. This pilot indicated that demographic information was unlikely to be available for the sorts of websites we were interested in, and/or was not available for free. We therefore adopted the same process as for print publications, expert judgement using a set of standard criteria relevant to websites.
- To give an example of the results of this assessment process, newspapers were generally categorised as having a 'mostly adult' readership, unless additional information indicated that their readership included students, in which case they were assessed as having a 'mixed' audience'. Magazines and websites focusing on activities involving major expenditure (holidays, cars, property) and on job recruitment were generally categorised as 'mostly adult'; magazines and websites about fashion, sport, entertainment or humour could be categorised as 'mostly adult', 'mixed' or 'mostly youth' depending on the imagery, style and general tone of the publication or website. Computer gaming, music and social media websites were generally categorised as either 'mixed' or 'mostly youth', again depending on the imagery, style and general tone. Local news and music radio stations were categorised as having 'mixed' audiences.

Once each item had been assessed, a series of short descriptors was added to each item in the spreadsheet indicating whether the advertising had been placed in a publication/website/radio channel aimed at the general public or retail/trade, the nature of the publication/website/radio channel, and whether it was aimed at a 'mostly adult', 'mostly youth' or 'mixed' audience.

3. Assessment of creative samples. Members of the research team with relevant language skills examined the creative samples of tobacco advertising and provided a short description for each indicating:

- the company which had placed the advertising;
- (if known) the publication/website in which the advertising had been placed;
- the content/message of the advertising;
- whether it was advertising a particular brand or product;
- whether it mentioned or depicted smoking or tobacco products.

This exercise was particularly helpful where the advertising expenditure data indicated that there was advertising activity in a medium and country in which it should have been banned (for example, the data indicated that there was tobacco advertising in print in Spain and Greece during the study period). Through this exercise we could identify that this advertising was unlikely to have been brand or product advertising, but instead comprised other types of advertising (e.g. professional recruitment, CSR statements).

4. Calculation of tobacco and e-cigarette advertising expenditure. Figures were then calculated, for each country, product category and media channel, to show:

- the total amount of advertising spend;
- the total amount of advertising spend in media aimed at the general public;
- the total amount of advertising spend in media aimed at a 'mostly adult' general public audience;
- the total amount of advertising spend in media aimed at a 'mostly youth' general public audience;
- the total amount of advertising spend in media aimed at a 'mixed' general public audience.

5. Calculation of advertising expenditure as a percentage of total advertising expenditure. It is difficult to compare the tobacco and e-cigarette advertising expenditure figures between different countries in a meaningful way when they are considered in isolation. For example, the figure for e-cigarette print advertising may be higher in the UK than in Lithuania, but the countries differ substantially in population size, size of the media market, the costs of buying advertising, the amount of advertising for other products and so on. This makes it difficult to assess whether UK citizens are exposed to relatively more e-cigarette advertising than those in Lithuania.

In order to make this sort of assessment, advertising share needs to be examined: of all the advertising in a country, for all products, how much of it is for tobacco and e-cigarettes? Calculating this gives a figure which can be meaningfully compared between countries with very different population sizes and media markets.

Data were obtained from WARC (World Advertising Research Centre) on total advertising expenditure for all products in the four media channels (print, internet, outdoor, TV and Radio) for 2013. It should be noted that while the advertising expenditure data covered the period mid-2013 to mid-2014, the total advertising expenditure data was for the whole of 2013 (data for 2014 were not yet available), so the periods are not fully comparable. There is some minor year on year fluctuation in total advertising expenditure as recorded by WARC.

Advertising share for tobacco and e-cigarettes was then calculated; that is, how much of the overall spend on print advertising in each country was made up of tobacco and e-cigarette advertising. *Because the amount of tobacco and e-cigarette advertising spend was generally very low in relation to the total spend (in most cases, less than 1% of the total spend),* the following calculation was performed: for every million euros spent on total advertising in 2013, how many euros were spent on tobacco advertising and on e-cigarette advertising? This generated more easily comprehensible figures which could be compared between countries.

Data not held by Kantar

The data held by Kantar enabled us to make an assessment of advertising activity for print, internet, outdoor and TV & Radio, which cover work packages 2-5. Kantar did not hold data on advertising at point of sale (work package 6), and did not routinely monitor sponsorship deals (included in work package 7), although they did gather ad hoc examples of sponsorship. In order to assess exposure at point of sale, a detailed series of questions was included in the key informants' survey (see section 4.5). For sponsorship, we reached an agreement with Kantar that they would supply us with descriptive data on any examples on which they had information during the study period, although it was noted that the data would not be presented in the same form as the other categories of marketing spend outlined above.

Limitations of the advertising spend data analysis

Kantar's monitoring methods are confidential and commercially sensitive. The data they collect is "as is" and without warranty of any kind. Further information about Kantar can be found at <http://www.kantarmedia.com/global>.

It is not certain that all relevant advertising activity was detected through the monitoring, or that the methods for capturing activity were similar from country to country. A caveat must therefore be applied to all the advertising spend data, that the completeness of coverage and comparability of data between countries are unknown.

4.4 CITIZENS' SURVEY

The aim of the citizens' survey was to complement the advertising spend data with respondents' recall of seeing advertising for tobacco and e-cigarettes across a range of different media. Thus, the citizens' survey is a crucial input to the measurement of exposure to tobacco and e-cigarette marketing and its drivers.

To ensure a high quality market research service and to have certainty regarding sampling, robustness and number of responses, the survey was carried out by a professional survey and market research firm (GFK) with extensive experience in carrying out pan-EU market research including for DG SANTE.

Specifically, the citizens' survey collected the following broad types of information for each type of media covered in the project.

1. Level of usage of the media by the respondent;
2. Specific recall of tobacco advertising in these media over the past year;
3. General perceived frequency of tobacco / e-cigarette advertising in these media;
4. Where relevant, specific recall of tobacco advertising aimed at young people.

Sampling

In order to provide a robust sample size, the survey - carried out using GFK's online consumer panel - aimed to interview at least 5,500 members of the general public, spread across 11 countries. The following table summarises the actual number of interviews achieved per country.

Table 4.4.1: number of interviews per country

	Number of interviews
Denmark	504
France	501
Germany	501
Greece	507
Hungary	500
Lithuania	503
Netherlands	506
Poland	502
Portugal	500
Spain	501
United Kingdom	501
TOTAL	5,526

A sampling strategy was adopted to ensure that there is socio-demographic national representativeness in terms of age, gender, education level and income level based on the most recent available census data.

It was also agreed to include young people starting at age 15 and not to oversample any age group.

Questionnaire Design, Translation and Scripting

The questionnaire was developed in collaboration between VVA Europe, Stirling and GfK. The final questionnaire (see Annex 2) was submitted to the Commission for approval before launch. Following approval of the English version, the questionnaire was translated into the national languages of all countries surveyed in order to maximise respondent engagement and understanding.

Following translation, GfK converted the questionnaire for all languages into an online script using the ConfirmIt software. A specialised GfK testing team then checked the questionnaire programming via a two-way approach: by conducting test interviews and by producing and checking a simulation dataset.

Fieldwork

At the start of fieldwork, GfK Belgium conducted a 'soft launch' first in all 11 countries. During the soft launch, the first 10% of the interviews were conducted in each country to be surveyed using the same methodology as in the main stage (thus, 50 soft launch interviews per country). Since no changes were required following the soft launch, the fieldwork proper was launched at end February 2015.

Data Processing and Delivery

Following the fieldwork, data were checked for quality and delivered to the research team in Excel format for analysis on March 21, 2015.

Data analysis

The data analysis process consisted of creating diagrams and tables for each question in the survey to identify the key patterns in the data. The next step was to complete the descriptive analysis and carry out a more in-depth analysis using cross-tabs to investigate particularly interesting patterns in the data. Mean frequencies of use of media were calculated in each country surveyed by ranking frequencies from 1= 'Daily' to 7= 'Never' (1= 'Daily' ; 2= '2-3 times a week' ; 3= 'Weekly' ; 4= 'Once every two weeks' ; 5= 'Monthly' ; 6= 'Less than monthly' ; 7= 'Never') and averaging them. Frequencies of recall of advertising were ranked on a four-point scale as follows: 1= 'Often' ; 2= 'Occasionally' ; 3= 'Very rarely' ; 4= 'Never', and then averaged by country to obtain the mean frequency of recall. Full notes are provided under each table and diagram to describe any operations on the data (e.g. where response categories were combined to facilitate analysis and presentation). Mean intervals of equal range were selected as follows for the translation of the means into frequencies. Mean frequencies of recall between 1.00 and 1.35 were considered as 'Often', means between 1.36 and 1.65 translated into a frequency 'between often and occasionally', and frequency means between 1.66 and 2.35 were considered as 'Occasionally'. Means of 2.36 to 2.65 could be translated into 'between occasionally and very rarely', while means contained in the 2.66 to 3.35 interval translated as 'Very Rarely'. Finally, means between 3.36 and 3.65 translated as 'between very rarely and never' while means between 3.66 and 4.00 were translated as 'Never'. Intervals for "Often" and "Never" were shorter than for the other frequencies (0.35 instead of 0.70) as they represented the extremes of the possible range, and were therefore considered as strong statements in the context of the study. These intervals were also used for the translation of means into use frequencies.

Please note that the whole sample was used in the calculation of reported recall means and percentages, including those individuals who reported not using the media in question, as the aim of the survey was to give a picture of the overall tobacco and e-cigarette advertising recall in the general population (and not simply the subset that consumed specific media types). It was considered that respondents who did not use a specific media type could not, therefore recall, seeing any advertising in that media type and were counted as having a recall of 'Never'. The mean reported recall for each media type from the subset of respondents who reported using it is also presented in the report.

The analysis for each work package (type of media) is divided into 5 steps:

1. **Reported use of the media.** For each relevant media type, this includes a tabular analysis of mean reported use of the type of media across countries in the sample, broken down into different sub-categories within each media type.
2. **Reported recall of tobacco advertising.** For each type of media, this includes a summary presentation of mean reported recall across the sample, by country and by sub-category of media within each broad media category (e.g. domestic newspapers within the broad category of print media – see also the survey Questionnaire in Annex 2 for all categories that were considered). It also includes a distinction between reported recall rates for smokers/non-smokers and among young adults (15-24) and adults (25+).

3. **Reported recall of tobacco advertising in at least one category within the media type** (print, online, retail, etc). This is based on a graphical analysis of the share of the sample which report that they recall tobacco advertising occasionally or often in at least one sub-category within each media type. This type of analysis provides a different perspective on the responses, which is valuable in particular where respondents are unable to distinguish clearly between the different sub-categories within one type of media. For instance, a respondent may recall having seen advertising in a print medium but they may not remember whether this was in an international or local newspaper.
4. **Reported recall of e-cigarette advertising.** For each type of media, this mirrors the analysis of reported tobacco advertising recall in point 2 above.
5. **Reported recall of e-cigarette advertising in at least one type of media.** This mirrors the equivalent analysis for tobacco advertising described in point 3 above.

The main value of the citizen's survey is to provide a description of key patterns in the data and to identify differences across types of media, countries, smokers (vapers)/non-smokers (non-users), and young adults/adults. Statistical significance of differences in reported means across media types and countries was evaluated using ANOVAs with a 95% confidence interval. The corresponding F values are cited in the main body of the text where relevant. In addition, statistical significance of differences in reported means between categories (young adults/adults, smokers/non-smokers, vapers/non-users) was evaluated using t-tests with a 95% confidence interval. The corresponding p-values are cited in the main body of the text where relevant. Furthermore, correlation between reported use and recall was calculated where relevant.

The main objective of this research is to describe exposure to advertising in the population across media types. There are however a number of additional relationships that could not be investigated within the scope of this descriptive analysis but which could inform future research. For instance, differences in reported use of media between smokers (users) and non-smokers (non-users) were not addressed in this study because there is no indication to suggest that tobacco/e-cigarette use affects the frequency of media use, except for those media that are aimed specifically at smokers or e-cigarette users (e.g. online retailers of tobacco or e-cigarettes, specialised tobacconists or e-cigarette shop and tobacco vending machines). Furthermore, the scope of this study did not allow for a multivariate analysis, (e.g. investigating reported recall by age, controlling for media usage). However, such multivariate analysis could be considered in future research.

The following caveats need to be kept in mind:

- There is a risk that reported recall in the citizens' survey may lead to overstatement because recall can be more a measure of salience than of actual advertising activity, and people's memories do not necessarily keep within the 12-month timeframe indicated in the survey questionnaire.
- Recall can relate to a picture of a tobacco or e-cigarette product in print media that has been misinterpreted as advertising, or the recall of advertising from another country. This is particularly true of recall in countries where advertising is not permitted (e.g. Denmark and Hungary).

4.5 KEY INFORMANTS' SURVEY

Overview and aims

This strand of the study comprised an email questionnaire survey of tobacco control experts in eleven Member States. The aim of the key informants' survey was to gather information on marketing activity in channels where spend data were not available or where additional detail was required.

Methods

A questionnaire (Annex 3) was developed by the academic team covering the following areas:

- questions on current controls on marketing activity in different channels, and perceived level of compliance with those controls (to inform WP1)
- questions on tobacco and e-cigarette marketing and related content on social media (to inform WP3). Key informants were also asked to identify and describe examples of tobacco and e-cigarette advertising found online. Informants were asked to select the four most popular local language social networking sites in their country, and for each social networking site, to provide a brief overview of any cigarette and tobacco related advertising and brand related messages they observed, including links to any examples. To guide them in selecting the social networking sites, informants were instructed to consult independent national data on usage of social media, if they exist. In the absence of national data, it was suggested to use the 'Social Media Guide' (<http://businessculture.org>). Informants were also asked to report how they made the selection.
- questions on specific promotional activities, including distribution of free samples and free gifts, prize draws and sponsorship (to inform WP6). For any examples they had seen or read about, they were asked to describe the nature of the activity, the brand(s) involved, the location, and the nature of any samples, gifts or prizes.
- questions on the availability and display of tobacco and e-cigarettes in different types of retail outlet (to inform WP6). For these questions, informants were asked a series of questions on the visibility of products and advertising in a wide range of retail outlet types. They were instructed: "To provide a more reliable profile of point of sale marketing activity it will be necessary to visit retail outlets before completing these questions, or to seek wider opinion on these issues from people who frequent these types of outlet".

How were the key informants selected and recruited?

Based on the network that had already been established by SFP in prior collaborations with national tobacco control experts, SFP identified 11 key informants, each based in one of the 11 target research countries (listed at Annex 3).

The key informants were selected based on the following criteria:

1. Extensive knowledge of tobacco control laws and regulations at national level
2. Assessment of their reliability based on previous experiences developed during previous projects
3. Research skills
4. Willingness

Emails and telephone calls were used to ensure participation, mainly due to the easy use of these communication methods, but also due to the limited timeframe. All the informants that were approached agreed to complete the survey and confirmed their participation through a Memorandum of Understanding.

Survey Delivery and Return: Process and Achievement

After receiving the surveys, it transpired that organisational capacity varied between countries. Some informants, notably from Denmark and Hungary, gathered the information individually while informants from the UK and France were able to utilise the existing knowledge of their organisation. In Lithuania and Denmark, national government departments or bodies were consulted to provide additional compliance data and confirmation of factual details such as the introduction date of legislation. The availability of additional information such as reports and research results to complement the survey varied across countries and is arguably due to different levels of tobacco control funding nationally.

Following submission to the analysis team via email, there were some outstanding questions and clarifications for some of the informants. Therefore, SFP contacted the respective informants and posed the clarifying questions and where necessary, asked them to complete some of the unanswered questions. All of these informants responded quickly. Where appropriate, the University of Stirling team conducted additional online searches for additional examples or for further information.

Analysis

Completed surveys (one from each country) were sent to the academic team for analysis. The University of Stirling team verified the content of all links provided by key informants by checking all links and translating relevant content. Where possible and relevant, data were summarised in basic descriptive tables to enable comparison between countries. Textual data – for example, on social media content - were analysed in a narrative synthesis with illustrative examples.

5. FINDINGS

5.1 WORK PACKAGE 1: LITERATURE REVIEW

The aim of Work package 1 was to provide a literature review on industry marketing strategies for tobacco products (since 2012) and e-cigarettes (since 2010) in the EU.

5.1.1 AN OVERVIEW OF MARKETING STRATEGIES

This report provides information on marketing strategies for tobacco used by the tobacco industry in the European Union since 2012, based on a desk-based search of a range of publication types covering the time period including January 2012 to 1 October 2014 for tobacco. It also outlines evidence on the marketing of e-cigarettes across EU Member States since 2010, based on a desk-based search of a range of publication types from January 2010 to 1 October 2014.

According to the American Association of Marketing, marketing can be defined as *'the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners and society at large'* [48]. In short, marketing is the set of activities a company does to increase consumption and sales of its products. Marketing is often described by four main tools: promotion, place, price and product (the 4Ps). 'Promotion' is the way a company communicates to customers. Promotion includes paid advertising through traditional channels (print, TV, outdoor and so on) as well as communication through newer forms of media, including social media, as well as communication with stakeholders and policymakers through lobbying and corporate social responsibility activities. 'Place' refers to the marketing strategies and actions relating to availability and distribution – where a customer can buy a product. Marketers seek to make the place and means of purchase appropriate, convenient and appealing for customers. 'Price' refers to how products are priced, what customers are prepared to pay and how products are priced in relation to market competitors, and includes price promotions and price discounts. 'Product' refers to the design of the product, and includes product innovations, new variants, and packaging [49].

The Tobacco Advertising Directive (2003/33/EC) prohibits advertising and promotion of tobacco products in printed publications, on the radio, in information society services, and related sponsorship with cross-border relevance. However, within this report we do not just consider advertising as defined by the Tobacco Advertising Directive, but identify and describe marketing activities that are beyond the scope of that Directive and that have been used over recent years in the EU.

5.1.2 TOBACCO MARKETING: OVERVIEW OF STRATEGIES AND ACTIVITY

The findings in this section are largely based on data and information for investors found on four main tobacco companies' websites, on Euromonitor reports on trends in the tobacco market, and on articles published in the trade press. We have also used evidence from scientific papers and reports to provide contextual information for the findings. All literature sources used are included in the reference list in Annex 4.

In the past, the tobacco industry used a wide range of popular marketing channels such as printed media, advertising on billboards and posters or other types of outdoor advertising, TV and radio adverts, promotion and advertising of tobacco products at point-of-sale, as well as sponsoring various events and groups. When the Tobacco Advertising Directive entered into force, advertising of tobacco products in print media, radio and on-line services and sponsorship of cross-border events were banned. Many EU governments have, in line with FCTC and Council Recommendations, since then implemented further restrictions on promotion of tobacco products (for example, visible point-of-sale displays have been banned in Ireland and the UK, and Finland). As further restrictions are likely to be implemented in the future, the tobacco industry is constantly faced with the need for new marketing approaches to deal with a challenging regulatory environment. As advertising and direct marketing regulations are becoming more restricted, the tobacco industry has started to use wider strategies such as corporate social responsibility, which focuses on creating the reputation of a socially responsible company; brand stretching; or imitation products to market its products. Although some forms of tobacco marketing have been banned in most EU Member States, such as billboard advertising, the nature and extent of other marketing restrictions, such as marketing at point-of-sale, vary greatly between Member States.

In general, the European Union is one of the most challenging environments for tobacco product marketing. However, some major differences between Member States have been observed since the marketing restrictions included in the Tobacco Advertising Directive and FCTC have been implemented: while some countries have opted for only basic requirements, other have gone far beyond mandatory requirements and have decided to implement point-of-sale display bans or plain packaging legislation in the near future, leaving even fewer opportunities for the industry to market its products.

In 2014, at the Deutsche Bank Global Consumer Conference, Imperial Tobacco highlighted that the main drivers for strong performance in the EU were: no change to the regulatory environment, total tobacco portfolio initiatives, pricing and cost savings [50]. For them, marketing is about providing maximum benefits to consumers, selling as high as possible and having returning customers; their marketing is “*consumer inspired, brand centred*” [51].

As product preferences differ between smokers, the industry continues to mainly focus on providing a range of tobacco products that meet these consumer needs. The most commonly used approach for all major tobacco companies has been product innovation, including new or refreshed brand variants, and changes in packaging of tobacco products (discussed in the section ‘Product innovations’ below).

Marketing strategies are now described in more detail, under five headings:

- Advertising, promotion and sponsorship
- Product innovations
- Pricing
- Corporate social responsibility

1. Advertising, promotion and sponsorship

Overview of regulations

Detailed information on national legislation is provided in the 'Background and Policy context' section of the report (section 3). Most forms of direct advertising – for example, outdoor advertising, advertising in print media, advertising on TV and radio - as well as sponsorship are banned in the majority of EU countries.

Point of sale

In many countries advertising at point-of-sale is still permitted and used extensively by the tobacco industry. A study conducted in Greece in 2007 clearly identified a large number of tobacco points of sale within close distance of schools, and in the majority of these shops tobacco advertising was located below child's height. As suggested by previous research, point-of-sale displays play a crucial role in creating and enforcing brand imagery [52]. However, following an outdoor tobacco advertising ban in Greece in 2009, there was a reduction in advertising observed near schools [53].

Some changes in tobacco control legislation have been observed in some of the Member States since 2012. Tobacco point-of-sale displays have been banned in Finland since January 2012. In the UK in April, 2012, the ban on open point-of-sale (PoS) displays was implemented in large shops (2013 in Scotland), and in April 2015 was implemented in all remaining shops across the whole of the UK. To prepare for this display ban, research suggests that tobacco companies encouraged cigarette and tobacco retailers to pay attention to market trends and stock their selection of products according to customer needs; to shape displays by thinking carefully which brands and products should be placed on shelves; and to ensure that their staff were knowledgeable about products [54]. There are also indications that some small stores received funding from the tobacco industry to adapt their gantries for the PoS display changes, or had their gantry adaptation managed and funded by tobacco industry representatives directly [55]. Sweden is also currently considering implementation of a ban on tobacco PoS displays [56]. Further details on restrictions on PoS advertising are included in Table 8.

Prize draws and other promotions

From the academic literature, an example was reported in the journal Tobacco Control of a Marlboro promotion, printed in inflight magazines, connected to the 'Miles and More' frequent flyer programme run by a number of different airlines [57]. On a number of inter-European and long haul flights operated by airlines that participated within the 'Miles and More' programme, 18,000 reward miles could be exchanged for a carton of 200 Marlboro sticks and a saving of 2,000 miles per carton could be obtained for a double carton. An example of the advertising in a Lufthansa inflight magazine was shown [57].

Sponsorship

A few examples of sponsorship were found. These are examined in the Kantar advertising expenditure data in Work package 2 and the key informants' survey in Work package 7.

2. Product innovations

In 2012, British American Tobacco (BAT) reported at the Consumer Analyst Group Europe conference that their vision was *'leadership in earnings and value'* and that *'developing and rolling out innovations which exceed customer needs'* was essential to achieve sustainable leadership [58]. Companies state in their documents for investors that their strengths are strong brand portfolios and innovations. For example, BAT reported that growth in 2012 in certain markets for their brand *Kent* was explained by product innovations. In some markets, companies use specific strategies to achieve their goals; for example, BAT refers to Romania as *'a fantastic business story'*, and cites as main reasons for its success its ability to deliver innovations that meet consumer needs and expectations, and its *'outstanding marketing capabilities'* [59]. However, BAT also acknowledges that Western Europe is a tough battleground [59]. It is also quite clear that the main target group for its marketing activities is young smokers, as the company often refers to *'adult smokers under 30'*, abbreviated to *'ASU 30'*. BAT's long term strategy in Germany includes a strong portfolio based on product innovation and relevance to the ASU 30 group. Its innovation strategy remained unchanged in 2014, when BAT stated that *'differentiated taste and flavour will become increasingly popular'* [60].

Similarly, Imperial Tobacco (IT) has a very consumer-centred approach, which is based on understanding consumers' expectations and needs, then meeting them. In 2012, sales growth drivers were portfolio management, innovations, customer engagement and pricing [61].

According to Philip Morris International (PMI), current key emerging tobacco product trends include lighter and smoother tasting products, slimmer diameters, fresher aftertaste, and the ability to vary the nature and taste intensity of a smoking experience. Therefore innovations are mainly focused on delivering *'taste smoothness'* and *'fresh taste'*, on cigarettes that are *'ego-social friendly'* (meaning that they minimise unpleasant smoke odour and are easy to stub out), and on *'eco'* products which are additive-free, use environmentally friendly materials in their manufacture, deliver an *'authentic tobacco taste'*, and are *'sustainable'* [62].

No publicly available information from Japan Tobacco International was found relating to product innovations.

Key product innovations identified in the literature search, including Euromonitor reports, industry presentations and reports and trades press, could be grouped into various categories:

- pack size, type and design (e.g. automation, hybrid pack materials and tactile finishes);
- slim and superslim cigarettes;
- capsule technology;
- new brands or brand variants; and
- additive-free cigarettes [63-65].

Each of these is discussed in more detail below

Packaging innovation

Evidence on the importance of graphical design (colours, fonts and so on) in tobacco packaging has been available for decades, and the tobacco industry has recognised its importance. The primary function of packaging design is to make it look appealing to customers and make it stand out among other products of a similar type. Previous research suggests that changes in packaging help to create brand image, and various changes in logos, symbols, colours and fonts have a significant impact on cigarette sales [66]. According to Euromonitor International reports, packaging innovation is a quick way of adding value to brands [65]. Three main recent packaging innovations include automation (pressing or pushing an area of the pack to open it), hybrids (combination of different materials), and finishing, for example adding a tactile finish to the pack [65]. Packaging innovations can be visible on actual cigarette packs, and can also be communicated to consumers in advance, either with cellophane overwrap or pack inserts. For example, for the *Silk Cut* brand in the UK produced by JTI, a new textured pack design was shown as a spotlight on the cellophane overwrap ('*feel the new Silk Cut*') [65].

Another type of packaging innovation is structural innovation, which includes changes in pack shape or pack opening. Structured design changes help to differentiate products and stimulate consumer interest in these products. At the same time they are an important tool to revitalise brands, by adding value and appeal, and help to increase sales of a particular product [66]. For example, one of Imperial Tobacco's biggest innovation success stories has been Glide Tec technology; an innovative packaging opening mechanism. It was used for the *Lambert and Butler* brand (suggesting on the pack '*Easy to open, one hand, one glide*') and was reported by Imperial Tobacco as having been highly successful in the UK in terms of growth in market share [61]. It has also been used extensively for their *John Player Special (JPS)* brand and launched in other countries, for example, in Germany.

In 2013, according to Imperial Tobacco data, *JPS* packaging was rated considerably higher than standard packaging among customers. The perception score vs. market average was 1.8 in the UK, 3.8 in Spain, 2.2 in Slovenia, 2.1 in Germany, 6.0 in France, and 0.8 in Austria [67].

In 2014, Philip Morris International launched new *Marlboro Red* claiming that it had a new 'touch and feel' pack design, a firmer filter which eases stubbing out the cigarette and a 'round' taste. New *Marlboro Red* was reported as having received positive feedback from consumers in test markets, including France, Germany and Italy [62].

Packaging design is changing not merely for cigarettes but also for roll-your-own tobacco. For example, in the UK, the *JPS* roll-your-own tobacco pack was redesigned from a traditional landscape format into a portrait pack format [55]. The sleek, new-look packs were intended to make price marking more visible and merchandising easier.

Slim and superslim technologies

Scientific evidence suggest that slimmer packs are mainly targeted at women and used as a fashion statement [66]. For slim and superslim cigarettes, the latest product innovation trends include replacing the feminine pastel colours and floral patterns with unisex designs, as this product is increasingly popular among men and women in larger markets. Other innovations in this sector include king size and demi-/semi-slim cigarettes, lower price options and cigarette brand crossovers,

as many of the large international cigarette brands are now available in slim or superslim variants (see also below) [65].

Capsule technology

In 2012, BAT reported that one of the most popular product innovations, which is a crucial element of the marketing mix, has been the development of capsule technology (through which a smoker can change the taste of a cigarette by crushing a flavoured capsule inside the filter). One of the factors that make this products appealing to consumers is the option to 'individualise smoke' [68]. Capsule technology has contributed to the growth of the *Lucky Strike* brand in some markets, including Western Europe [58]. Similarly, a year later in 2013, again in Western Europe, growth in the innovation segment was based on leadership in capsule technology development. Capsule cigarettes are described as particularly popular among men and women in their mid-twenties who are reportedly keen on the novelty factor [55].

New brands or brand variants

JPS is one of Imperial Tobacco's most successful brands: according to the company, it offers consumers an international brand for a reasonable price without compromising on quality and style. *JPS* is targeted according to Imperial Tobacco at consumers who want '*to act and look smart with a brand that provides style and elegance*'. There is a large range of brand variants available (with more planned), including fine-cut loose tobacco, and recently *JPS Duo* cigarettes with crushball (capsule technology) and an additive free version of *JPS* cigarettes [69 70]. Similarly, the *Gauloises* brand range has been extended by offering additive free cigarettes and a fine cut loose tobacco variant [70]. As before 2012, brands have also been extended with menthol variants, for example BAT's brand Rothman [71]. Tobacco products with a characterising flavour will be prohibited by the Tobacco Products Directive. However, new product development has been observed, for example a 'flavour strip' that allows flavour to be transferred to cigarettes by inserting the strip in a cigarette pack and leaving it for 10-15 minutes. Available flavours include menthol, vanilla, apple and watermelon, and the strip can be used for products other than tobacco [72].

Another example of developing a brand to meet a particular consumer need, and one focusing on strong brand identity, is the luxury *Davidoff* brand. As mentioned in one of the investor presentations on the Imperial Tobacco website, *Davidoff* is the brand that is '*able to generate a strong almost irrational emotional link well beyond functional benefits*'. The marketing for this luxurious brand encourages consumers to demonstrate their success to others by smoking *Davidoff*. Along with many other brands, *Davidoff* has developed several brand variants, including a classic range, a *Black & White* range, *Davidoff iD*, and also ultra slim *Davidoff Boudoir* (the latter in the Russian market). According to Imperial Tobacco, these multiple brand variants were designed to '*extend the brand across more consumers and more occasions*' [69].

Imperial Tobacco has also used a 'brand migration' approach, where some of the local or regional brands in a country are migrated into so-called 'growth brands' (high quality brands with well-established global market positions, and often available in total tobacco offerings, i.e. cigarettes and fine cut loose tobacco). Brand migration is a marketing strategy that takes place in several stages, with products undergoing gradual changes in packaging and brand identity [70 73]. Brand migration is carried out for companies to better focus their effort, for example innovations, on a smaller number of brands ("*fewer, bigger, better*"). In addition, brand migration creates value and leads to revenue growth [74].

Similarly, Philip Morris International is also focused on using its strong brand portfolio for the highest benefit. In 2014 in the EU region, the new brand variant *Marlboro Red* was increasingly popular among young smokers (18-24 year olds) and female adult smokers. *Marlboro* has also been a leader in innovations. In 2013, *Marlboro Micro Beyond* (superslim cigarettes with a mint capsule) was launched in France, and *Marlboro Fuse Beyond* (regular cigarette with two capsules in the filter to provide different taste options) was launched in the Czech Republic and the Netherlands. In 2013, Philip Morris International also experienced a growth in fine cut loose tobacco, largely driven by brands that were cigarette brand extensions [75].

Another trend in the market has been the introduction of different size cigarettes. Queen size cigarettes have been launched as a new format – they are equal in length to king size cigarettes, but 1mm narrower in width [76] – and are available for several brands including *Davidoff Shape* cigarettes, the *Gauloises* brand [70] and some *Marlboro* brand variants. Shorter cigarettes have also been developed for compact and pocket packs, for *Marlboro* and *Pall Mall*.

In addition, there have been launches of new brand variants in the roll-your-own tobacco sector: for example, Japan Tobacco International extended their Amber Leaf brand with Amber Leaf Blond, which comes in paler packaging and is said to offer smokers a smoother taste. The product is available in a 12.5g crashbox with rolling paper included and also in price marked packs [77].

Additive free cigarettes

As in previous years, additive free cigarettes are becoming more popular among smokers. For example in the UK, the Scandinavian Tobacco Group UK extended its *Natural American Spirit* brand with new brand variant *Orange* cigarettes [55].

Product innovations in smokeless tobacco

The placing on the market of oral tobacco products is banned in all Member States, except Sweden [78], which has a derogation from the ban in its Accession Treaty. In Sweden, the market is largely dominated by Swedish Match. One of the strategies used by the company to increase market share in 2013 was the launch of a new brand extension - General Tailored. According to Euromonitor, the company claims that 'the pouches' fit under the lip better due to a patent pending Swedish Match technology called NatuFibe, which is an innovation based on natural plant fibre. This product was sold in smaller 16g cans with lower tax [79]. Apart from smaller pack size, other innovations in smokeless tobacco market include larger pack size (offers value), stronger taste with high nicotine content (Nordic Breeze in Norway), and new flavours for existing brands (innovations refer to global smokeless tobacco products market) [80]. The Tobacco Tactics database contains some evidence on Swedish Match online marketing, including activities in social media and direct contribution to online consumer forums [81].

3. Pricing

Price, one of the marketing 'four Ps', is a main driver of innovations and frequently used in conjunction with product innovation to add value to brands and to prevent downtrading. Pricing strategies vary between countries. For example, in Germany the main focus is on additive-free products and maxi packs (28s, 29s, 30s), while in the UK smaller packs (10s, 14s, 19s) have been one of the popular pricing strategies [63]. According to Euromonitor International, *'new product development is becoming increasingly regarded as a vital element in maintaining consumer perceptions of international brands and persuading cash strapped smokers not to trade down to cheaper brands, give up or switch to illicit trade'* [65]. Due to price increases and also difficult economic times, manufactured cigarettes have become too expensive for many smokers. Therefore tobacco manufacturers have developed a wide range of adjacent products (quite often under cigarette brand names, see 'New brands or brand variants' above) either through roll-your-own (RYO) or part-assembled RYO-type products such as tobacco rods [82].

Due to the increasing prices of tobacco products, smaller packs have become increasingly popular, and the tobacco industry is responding to this demand by providing RYO (loose) tobacco in smaller packages. For example, Imperial Tobacco launched *Gold Leaf* in a 9 gram-pack [83]. In the UK, for example, manufactured cigarettes in packs of 19 cigarettes have become increasingly popular due to their lower price. Also, as identified previously in the 2012 report, price-marked packs are popular among price-sensitive smokers [55]. In 2014, Imperial Tobacco also launched Lambert & Butler Blue available in king size 19-packs and also in smooth variant as a low price option. Similarly, JTI launched Benson & Hedges Blue which was also available in king size 19s and smooth flavour variants, and was slightly cheaper on the UK market [71]. Other small packs, such as 10s or 14s, are also designed to appeal to smokers with limited income. However, the new Tobacco Products Directive prohibits packs containing fewer than 20 cigarettes [78].

As for manufactured cigarettes, smaller formats of roll-your-own tobacco products have also been launched: for example, for less than £3 in the UK, Imperial Tobacco launched a 9g Gold Leaf pack

which could equate to approximately 22 cigarettes. Another recent trend has been 'combo packs' which contain papers and filter tips, such as Imperial Tobacco's Golden Virginia 8g packs with tips and filters included [68].

Marlboro's growth may partly be explained by the use of 'price-banded' variants. These products are aimed at consumers who want to use premium brands but cannot yet afford to do so. Examples include *Marlboro Touch* (slightly slimmer cigarettes) in Italy and Spain, *Marlboro Pocket* (shorter version) in Portugal and *Marlboro Maxi* packs in Germany and the Netherlands. In 2013, these price-banded variants accounted for almost 20% of total *Marlboro* share. Philip Morris International's most popular below-premium brand is *L&M*, which experienced growth in 2013, with its equity being strengthened through innovations (e.g. capsules and additive free variants) [75].

4. Corporate social responsibility

Another continuing trend is the tobacco industry's efforts to make positive societal contributions and focus on corporate social responsibility, a marketing strategy intended to create the reputation of a socially responsible company [84], and used not merely by the tobacco industry. This approach is used by Japan Tobacco International, for example, who have stated that they are working towards promoting 'better smoking manners' and a more favourable smoking environment (e.g. setting up smoking areas, organising community clean-up events). The company's social commitments include promoting literacy in France, supporting a large art museum in the Netherlands, supporting art initiatives in Poland, support of elderly people in the Czech Republic, supporting a food bank in Spain and provision of various types of support for local and regional projects [85 86].

In Poland, in recent years the tobacco industry has supported government initiatives such as the Don't Smuggle Campaign (2011), to increase social awareness about negative consequences of smuggling and including leaflets, posters, billboards and education activities in schools [87].

5.1.3 MARKETING OF ELECTRONIC CIGARETTES SINCE 2010: STRATEGIES AND APPROACHES

Overview

Electronic cigarettes (e-cigarettes) were invented in 2004 by a company called Ruyan, and since then have become increasingly popular in Europe and elsewhere. While tobacco industry marketing has evolved over several decades, the marketing of e-cigarettes is a relatively recent phenomenon and evidence on this marketing is limited and still emerging. E-cigarette marketing is generally not regulated in the EU, but will be regulated from 2016 under the Tobacco Products Directive. This section is based on published reviews and industry trade press, and aims to summarise marketing strategies used by e-cigarette manufacturers.

As electronic cigarettes have become increasingly popular in some EU countries, there have been a wide range of marketing strategies used, aimed at consumers, retailers and also policy makers. National legislation on e-cigarettes currently varies between Member States. However, as of May 2016, the TPD will harmonise MS legislation in a number of areas, including restrictions on marketing with cross-border relevance.

Unlike the tobacco market, the e-cigarette market includes large tobacco companies, international e-cigarette brands that are independent of the tobacco industry, and many small local or national companies, all competing for customers using all possible marketing strategies (depending on restrictions in each country).

Advertising

An academic report in 2013 for Cancer Research UK on e-cigarette marketing in the UK found a wide range of strategies being used, including paid advertising in different media, promotional pieces in newspapers such as competitions, survey results, and television adverts (mainly for those who were trying to quit smoking) [88]. The report suggested that e-cigarette advertising could be designed to appeal both to existing smokers, as well as to young people [88]. According to the report, e-cigarette marketing aimed at smokers focused on communicating information on the potential benefits of using e-cigarettes instead of conventional tobacco cigarettes. E-cigarettes were marketed as: a safer and healthier source of nicotine compared to tobacco; beneficial for those who wanted to cut down on smoking or quit smoking; a product to be used in situations when smoking was not permitted; a cheaper alternative to tobacco smoking; and as a cleaner alternative for smokers offering a similar experience (taste and looks) to smoking conventional cigarettes [88].

Strategies for marketing e-cigarettes which might appeal particularly to both young people and adults (particularly adult smokers) were found in the Cancer Research UK report to include innovative packaging and attractive design, offering a range of flavours, and price incentives and promotional discounts (see also Product Innovation and Pricing Strategies below) [88]. Other strategies used in marketing include online promotions (contests, discount vouchers), sponsorship of sports events and teams [89], and the sale of certain products at exclusive events, popular venues and specialist shops [88].

In Germany, a study investigating the online marketing of e-cigarettes between December 2013 and March 2014 found that e-cigarettes were advertised as lifestyle products, with advertisements emphasising the variety of flavours, modern design, premium quality, and reduced costs compared to tobacco smoking. On about 85% of investigated websites, e-cigarettes were marketed as less harmful

than tobacco products, and the majority also highlighted the benefits of using these products in social situations i.e. no smell and no passive exposure to vapour. The study found that 19 out of 20 e-cigarette websites investigated in the study were accessible without age restrictions [90].

Celebrity endorsement has also been used to promote e-cigarettes: for example, one study found that e-cigarettes were used in some of the most popular music videos on a video-streaming site [91]. There are also examples of celebrities being involved in advertising or promotional activities of electronic cigarettes: for example, actress Mischa Barton was chosen to be the face of The Style Icon campaign by the Vapestick brand inviting adult smokers or vapers to enter a competition by submitting a picture of themselves 'striking a stylish pose with their favourite Vapestick' product [92] and Courtney Love has starred in an NJOY e-cigarette advert [93].

Electronic cigarettes are widely available and promoted in various types of retail outlet (see Work package 6 for detailed information on e-cigarette visibility at point of sale in different retail outlets). It has been suggested that when the PoS ban for tobacco products comes into force in small shops in the UK, there may be more retail space that could be used for merchandising e-cigarettes and their accessories; some manufacturers have described how they have used eye-catching packaging design to attract customer attention at PoS [94].

E-cigarette advertising online and on TV and radio has contributed considerably to growth of sales [95]. For example in the UK, *E-lites* have been advertised on TV, featuring a father who misses his baby's first steps because he went outside to smoke a cigarette, showing that this would not happen if he were to use an e-cigarette in the home [96].

In addition, some of the e-cigarette manufacturers have extensive social media presence, for example, the e-cigarette brand Blu has thousands of followers on Twitter and Facebook and the brand has set up an online electronic music series [97]. E-cigarettes are intensively marketed in the trade press (periodicals for retailers such as newsagents, convenience stores and petrol/gas stations), informing retailers about available product ranges, recent developments and market trends, and explaining the benefits of selling e-cigarettes.

The key informants' survey identified information on other forms of promotion of e-cigarettes, such as offers of free trial products (see Work package 6).

Product innovation

E-cigarette manufacturers continue to devise innovations that are aimed to make their products stand out in the market, via the marketing 'Ps' of product design and positioning. For example, *NJOY* was the first manufacturer to offer an e-cigarette that directly resembled the look, taste and feel of a tobacco cigarette, though without the smell of tobacco smoke [98]. As there have been some concerns expressed in certain quarters about the safety of the products due to fire risk (some fires have occurred due to using incorrect chargers), Blu UK have introduced specific chargers for each device [99]. Another e-cigarette brand *e-Karma* markets itself as using a '*realistic, lightweight American design and its stylish looks give disposable e-Karma the feel of a product made on a tobacco line*' [100], aiming to appeal to smokers and encourage them to switch.

The TPD classifies e-cigarettes as 'refillable', 'rechargeable' and 'disposable'. Some manufacturers have carefully selected products that would provide a smooth transition from 'beginner' to 'expert' vaper [the term for an e-cigarette user] status. For example, *Vapestick* offer *V2* disposable e-

cigarettes for first time users, the *XL Starter Kit* (pre-filled cartomisers), or the *Max Refillable Starter Kit* to use with e-liquids in various flavours [94].

The brand *JAC Vapour* in the UK has developed a product that does not emit vapour when exhaled, has a wide range of flavours and has a variable voltage product to control the vaping process. However, innovations in e-cigarettes are not just focused on new e-cigarette product developments. They also extend to offering smokers opportunities to use various related apps for mobile phones or tablets; for example, an app has been developed that allows e-cigarette users to monitor their consumption [101]. The French company Smokio has developed an electronic cigarette that is connected with a mobile app that gives smokers precise information about their consumption including number of puffs, an estimated cigarette equivalent, savings made, a map of where the owner uses the device, as well as health indicators such as blood oxygen levels, cardiac incident risk and estimated number of days of life expectancy gained [102].

Several packaging design innovations offer various benefits. For example, *NJOY King* e-cigarettes come in a flip-top pack to keep the product clean and safe [98]. There is also, unsurprisingly, promotion aimed at different groups. For example items with a '*sleek and elegant design*' or that offer additional complementary accessories are developed to attract more female vapers [101].

E-cigarettes and liquids used for refillable cartridges are available in a vast range of different flavours and nicotine strengths. For example, the *NJOY* brand is available in Bold, Gold and Menthol flavours [98], and flavours are key to market development [94]. *Nicocigs* are available in classic tobacco, golden tobacco, menthol breeze, cinnamon apple, fruit fusion, pineapple rocks, apricot peach, red wings, citrus fruit, berry blast, and cappuccino cream flavours. *Truvape's* e-liquids are available in 28 different flavours including fruit, mint and tobacco flavours [94].

In terms of nicotine strength, for *Matchless* e-cigarettes for example, the choices include *Matchless Red* (full nicotine strengths (24mg) tobacco flavour), *Blue* (medium strengths (18mg) tobacco flavour), *Mint* (low nicotine strength (12mg) tobacco flavour), and *Zero* (contains no nicotine) [96].

In 2014, Japan Tobacco International launched a product called Ploom which sits between tobacco and e-cigarettes. It consists of a vaporiser and small aluminium capsules (similar to coffee capsules) known as Vapods that contain compressed tobacco which is heated not burnt. The product is available in some well-known cigarette brands such as Silk Cut, Camel, Benson & Hedges as well as in other brands such as Lugano or Dragon [103]. Another e-cigarette product development has been the launch of a Cuban-inspired electronic cigar in the Nicolites range [104].

Pricing strategies

As there is great variety in the e-cigarette brands and products available [94], the price of these products has been decreasing. E-cigarette product innovations are key to providing the 'added value' that users would be prepared to pay for. According to the Head of Nicoventures, '*Most brands are priced around the everyday low price proposition, but innovations and quality will segment the market*' [105].

E-cigarette manufacturers market their products as cheaper alternatives to smoking, suggesting that using e-cigarettes can be up to 70% cheaper than tobacco smoking, with all the additional benefits such as no smell, no second-hand smoke and a great choice of flavours [106].

Pricing strategies are also used to market e-cigarettes to retailers. E-cigarettes are promoted as beneficial for convenience stores because they can offer much higher margins than tobacco products, in many cases up to 40%. They have been described as '*a high margin product that takes up hardly any space - it's like the perfect product*' [96].

Corporate social responsibility and lobbying

E-cigarette manufacturers often promote their products as harm reduction products with benefits to public health when communicating with politicians, public health experts and others involved in developing policies relevant to e-cigarette marketing and use. [88].

5.2 WORK PACKAGE 2: PRINTED MEDIA

The aim of this work package was to provide an accurate and reliable overview of the amount of commercial communications for tobacco and related products, including e-cigarettes, to which EU citizens are exposed **through printed media** (periodical and occasional, sold or freely distributed) in the countries chosen.

Two methods were used to provide information on citizens' exposure in printed media:

- Analysis of advertising spend data
- Citizens' Survey

As outlined in the Methodology section, Kantar stated that it did not monitor tobacco or e-cigarette advertising in any channel in Hungary or the Netherlands⁶ because no advertising was permitted. Hungary and the Netherlands are therefore not included in the advertising spend tables in this section.

5.2.1 ANALYSIS OF ADVERTISING SPEND DATA

Amount of advertising spend

Data on advertising spend in printed media were provided by Kantar for **tobacco** (France, Germany, Greece, Lithuania, Poland, Spain) and for **e-cigarettes** (Denmark, France, Poland, Spain, UK, Lithuania). Kantar informed us that some print advertising for e-cigarettes had been recorded in Greece, but not during the period of interest, mid 2013 to mid 2014. Table 5.2.1.1 provides the overall totals for advertising spend categorised as relating to tobacco and e-cigarettes.

Table 5.2.1.1: Total spend mid 2013-mid 2014, print media advertising, tobacco and e-cigarettes, euros

Country	Tobacco	E-cigarettes
Bulgaria	None	None
Denmark	None	100,228
France	39,650	2,460,803
Germany	881,146	None
Greece	871,676	None
Lithuania	612	96
Poland	239,658	869,891
Spain	364,199	1,075,521
UK	None	5,954,563

Data/figures/information provided by Kantar Media - All rights reserved

Note: in the UK there was a separate category of Media Type for 'Door Drop'. 22,911 euros were spent on advertising E-Cigarettes in this way.

⁶ Other information sources indicate that e-cigarette advertising was allowed in the Netherlands in 2013.

As described in the Methods section above, we first of all assessed whether the advertising was placed in **print publications to which the general public was potentially exposed**, or in publications aimed at non-general-public audiences (retailers/trade). Tables 5.2.1.2 and 5.2.1.3 show how much of the advertising spend in each country was in the two types of publication. All of the print advertising spend for tobacco in France and most of the print advertising spend in Germany for tobacco was in publications aimed at retailers, while in Greece, Spain and Lithuania, all of the tobacco print advertising spend was in publications aimed at the general public (Table 5.2.1.2). In Poland, the advertising spend was divided between the two types of publication.

Table 5.2.1.2: Print advertising spend, mid 2013-mid 2014, TOBACCO, broken down by general public and retail media, euros

Country	Total	General public media	Retail media
Bulgaria	None	-	-
Denmark	None	-	-
France	39,650	0	39,650
Germany	881,146	3188	877,958
Greece	871,676	871,676	0
Lithuania	612	612	0
Poland	239,658	104,257	135,402
Spain	364,199	364,199	0
UK	None	-	-

Data/figures/information provided by Kantar Media - All rights reserved

Most of the print advertising spend for e-cigarettes was in publications aimed at the general public (Table 5.2.1.3).

Table 5.2.1.3: Print advertising spend, mid 2013-mid 2014, E-CIGARETTES, broken down by general public and retail media, euros

Country	Total	General public media	Retail media
Bulgaria	None	-	-
Denmark	100,228	87,598*	12,630*
France	2,460,803	1,732,251*	0*
Germany	None	-	-
Greece	None	-	-
Lithuania	96	96	0
Poland	869,891	869,891	0
Spain	1,075,521	1,075,521	0
UK	5,954,563	5,869,060	85,503

Data/figures/information provided by Kantar Media - All rights reserved * Data not available on all print titles

It should be noted that Kantar do not monitor many 'business to business' publications, therefore the data on advertising spend in retail publications do not reflect all the activity in this type of publication.

Types of tobacco advertising found in print media

For some countries, the Kantar data included samples of the actual tobacco advertising which had been placed in print media. These samples were analysed and described by our expert native speaker collaborators. This analysis suggested that brand and product advertising for tobacco products was found only in publications aimed at retailers.

In the publications aimed at the general public, the tobacco advertising fell into the following categories:

- Messages relating to counterfeit and smuggled tobacco (e.g. a statement highlighting the toxic substances found in counterfeit tobacco and calling for stronger action, an announcement about a 'technical conference' on the illicit tobacco trace)
- Professional recruitment ads (e.g. an advertisement for job opportunities for MBA students)
- Corporate social responsibility statements (e.g. a statement supporting good practice in tobacco growing)
- Sponsorship of cultural events

In the samples analysed, there were no instances of brand logos or packs being shown in any of the above types of advertising. However, company names and logos did appear in the advertisements.

Because the creative samples provided were only a sub-set of the total amount of print advertising recorded in the data, it was not possible to calculate spend figures for each of these different types of tobacco advertising (i.e. to calculate how much was spent on messages about counterfeit tobacco, professional recruitment and so on).

Potential exposure of young people to print advertising

The type of readership of the publications was assessed by focusing on the advertising spend in print publications aimed at the general public, in order to assess the extent to which young people were potentially exposed to the advertising.

As described in the Methods section above, this was done by assessing each publication title against a set of criteria, and by making an expert assessment as to whether the readership was likely to be '*mostly adult*', '*mostly youth*', or '*mixed*'. We defined 'youth' as aged 16-25. It should be noted that '*mostly adult*' publications may still be seen by young people (for example, picking up their parents' newspaper at home).

The spend data were then broken down by these categories to illustrate the extent of spend in print publications aimed at mostly adult, mostly youth and mixed readership. Information on publication title supplied by Kantar was incomplete for Denmark and France (although the information was supplied for the majority of the spend), meaning that the assessment was incomplete for these two countries.

The majority of print publications in which advertising had been placed, for both tobacco and e-cigarettes, were assessed as '*mostly adult*', with a small proportion defined as having a '*mixed*' audience, i.e. likely to appeal to and be seen by both young people and adults. None of the tobacco-related advertising was found in publications aimed at a '*mostly youth*' readership (Table 5.2.1.4), and only a small proportion of the e-cigarette advertising (Table 5.2.1.5).

Table 5.2.1.4: Print advertising spend, mid 2013 - mid 2014, TOBACCO, general public media, broken down by readership

Country	Total, general public media	Mostly adult	Mixed	Mostly youth
Bulgaria	None	-	-	-
Denmark	None	-	-	-
France	None	-	-	-
Germany	3188	3188	0	0
Greece	871,676	625,630	246,046	0
Lithuania	612	612	0	0
Poland	104,257	104,257	0	0
Spain	364,199	364,199	0	0
UK	None	-	--	-

Data/figures/information provided by Kantar Media - All rights reserved

Table 5.2.1.5: Print advertising spend, mid 2013 - mid 2014, E- CIGARETTES, general public media, broken down by readership

Country	Total, general public media	Mostly adult	Mixed	Mostly youth
Bulgaria	None			
Denmark	87,598*	58,885*	15,194*	0*
France	1,732,251*	1,455,192*	277,059*	0*
Germany	None			
Greece	None			
Lithuania	96	96	0	0
Poland	869,891	652,219	181,503	36,170
Spain	1,075,521	1,075,521	0	0
UK	5,869,060	5,838,263	30,797	0

*Data/figures/information provided by Kantar Media - All rights reserved * Data not available for all print titles*

Print advertising in 'cross-border' media

The Kantar data did not provide any information on advertising in 'cross-border' titles such as airline magazines.

Tobacco and e-cigarette print advertising share: a comparative assessment of countries⁷

Data on all advertising spend in 2013 were available from WARC, the World Advertising Research Centre. The data for print advertising are presented below in Table 5.2.1.6. The highest total spend on print advertising, for all products, was in Germany, followed by the UK, France and the Netherlands.

⁷ Tobacco and e-cigarette print advertising share was calculated for all eleven countries, including Hungary and the Netherlands.

Table 5.2.1.6: Total print advertising spend, 2013, by country

Country	Total spend in EUR (millions): Print advertising
Bulgaria	45.9
Denmark	598.6
France	3277
Germany	7622.9
Greece	336.9
Hungary	136.7
Lithuania	25
Netherlands	1232.9
Poland	229.1
Spain	955.5
UK	3781

Date Created: 17 March 2015 12:15 © Warc (www.warc.com), 2015. Please refer to notes on spend data for further detail and source information. <http://www.warc.com/NotesOnAdspendData>

Advertising share for tobacco and e-cigarettes was then calculated. The amount of tobacco and e-cigarette advertising spend was generally very low in relation to the total spend (in most cases, less than 1% of the total spend). In order to make the data easier to compare, the following calculation for each media channel in each country was made:

For every million euros spent on total advertising in 2013, how many euros were spent on tobacco advertising and on e-cigarette advertising?

It should be noted that while the WARC data on total advertising spend related to the full year 2013, the Kantar data related to mid-2013 to mid-2014.

Table 5.2.1.7: For every million euros spent on total PRINT advertising in 2013, how many euros were spent (mid 2013 - mid 2014) on (a) tobacco advertising, and (b) e-cigarette advertising, in general public media? ⁸

Country	Tobacco advertising	E-cigarette advertising
Bulgaria	0	0
Denmark	0	146
France	0	529
Germany	<1	0
Greece	2587	0
Hungary	0	0
Lithuania	24	4
Netherlands	0	0
Poland	455	3797
Spain	381	1126
UK	0	1552

Source: WARC and Kantar

WARC: Date Created: 17 March 2015 12:15

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<http://www.warc.com/NotesOnAdspendData>

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We can see that the *highest relative exposure of the general public to print advertising linked to tobacco was in Greece*, with over 2,500 euros per million euros of advertising spend. There was lower exposure in Poland and Spain, with a negligible amount of exposure in Lithuania and Germany. As we note earlier in this section, as far as we could establish, the advertising linked to tobacco mostly comprised statements about smuggling and illicit tobacco, CSR statements, professional recruitment and sponsorship of cultural events.

The *highest relative exposure of the general public to e-cigarette advertising in print media was in Poland*, with nearly 3,800 euros per million euros of advertising spend, followed by the UK and Spain, with much smaller amounts in France and Denmark and a negligible amount in Lithuania.

⁸ The spend is shown as 0 for Hungary and the Netherlands because Kantar had no data on spend in those two countries, as outlined in Section 4.3.

5.2.2 CITIZENS' SURVEY

In the survey, 5,526 individuals from eleven EU countries were asked how frequently they used four different types of print media: national and local newspapers & magazines, international newspapers & magazines, magazines produced for airplanes, ships and other means of transport, and print media aimed primarily at young people (<age of 18). Responses were recorded on a seven point scale: 'Daily'; '2-3 times a week'; 'Weekly'; 'Once every two weeks'; 'Monthly'; 'Less than monthly'; and 'Never' (ranked on a scale of 1 to 7). For those media which they used they were then asked how frequently they noticed tobacco advertising and e-cigarette advertising in each type of media. Responses were recorded separately for tobacco advertising and e-cigarette advertising on a four point scale: 'Often', 'Occasionally', 'Very rarely' or 'Never' (ranked from 1 to 4).

The tables in the following section present the mean values for the frequency of reading each of the four print media and mean values for the frequencies of recalling tobacco advertising and recalling e-cigarette advertising in the same media.

5.2.2.1 REPORTED USE OF PRINT MEDIA

Table 5.2.2.1: Print media use profile – Mean frequency of use

	Total sample (5526)	Age		Member State										
		Young adults (15-24) (1485)	Adults (25+) (4041)	DE (501)	DK (504)	EL (507)	ES (501)	FR (501)	HU (500)	LT (503)	NL (506)	PL (502)	PT (500)	UK (501)
National and local newspapers & magazines	3.37	3.76	3.23***	3.35	3.71	3.67	2.88	3.66	3.55	3.24	3.35	3.57	2.90	3.18###
International newspapers & magazines	5.08	4.67	5.23***	5.16	5.42	4.82	4.42	4.87	4.91	5.89	5.48	5.34	4.79	4.78###
Magazines produced for airplanes, ships and other means of transport	5.93	5.72	6.00***	5.90	5.96	5.83	5.50	5.83	5.95	6.48	6.19	6.12	6.00	5.44###
Print media aimed primarily at young people (<age of 18)	5.68	5.24	5.84***	5.66	5.91	5.29	5.19	5.79	5.54	5.83	6.06	5.72	5.75	5.73###

Mean score (0.00): 1= 'Daily'; 2= '2-3 times a week'; 3= 'Weekly'; 4= 'Once every two weeks'; 5= 'Monthly'; 6= 'Less than monthly'; 7= 'Never'

Base number (xxxx): number of people surveyed in the sample considered

t-tests for differences by age: * p<0.05; ** p<0.01; *** p<0.001

ANOVA's for differences by country: # p<0.05; ## p<0.01; ### p<0.001. Significant results indicate that not all countries are equal.

Table 5.2.2.1 presents mean frequency of reported use of print media in the eleven countries surveyed. On average, respondents read national and local newspapers and magazines on a weekly / fortnightly basis ($M=3.37$) while international newspapers and magazines were read monthly ($M=5.08$) and magazines produced for transport ($M=5.93$) and print media aimed at young people ($M=5.68$) were, on average, read less than monthly.

The results also showed that young adults (15-24) reported reading all types of print media, except for national and local magazines, significantly more frequently than adults (25+). Indeed, for national and local newspapers and magazines, the frequency of reported use for young adults overall was fortnightly ($M=3.76$) compared to weekly ($M=3.23$) for adults ($t(2615)= 8.58, p< 0.001$). However, for international newspapers and magazines the frequency for young adults was between fortnightly and monthly ($M=4.67$) compared to monthly ($M=5.23$) for adults ($t(2535)= -9.37, p< 0.001$), for magazines produced for airplanes, ships and other means of transport it was respectively almost less than monthly ($M=5.72$) against less than monthly ($M=6.00$) ($t(2293)= -5.68, p< 0.001$), and finally for print media primarily aimed at young people (<age of 18) the mean for young adults was monthly ($M=5.24$) while it was less than monthly ($M=5.84$) for adults ($t(2318)= -10.54, p< 0.001$).

Frequency of using each type of media differed across countries (National and local newspapers and magazines $F(10, 5515)= 10.85, p< 0.001$; International newspapers and magazines $F(10, 5515)= 23.80, p< 0.001$; Magazines produced for airplanes, ships and other means of transport $F(10, 5515)=18.81, p< 0.001$; print media primarily aimed at young people (<age of 18) $F(10, 5515)=10.90, p< 0.001$).

5.2.2.2 REPORTED RECALL OF TOBACCO ADVERTISING IN PRINT MEDIA

The following section presents the reported recall of tobacco advertising in the four types of print media considered. It should be noted that, for each media type, the frequencies of use and recall of tobacco advertising are not strongly correlated. Indeed, for national and international newspapers and magazines, the correlation between the means of reported use and recall was 0.178 and 0.0703 respectively, while it was 0.109 for magazines produced for airplanes, ships and other means of transport and 0.00385 for print media aimed at young people (<18) across all countries surveyed.

Across the four types of print media considered, participants, on average, reported recalling tobacco advertising “very rarely” or “never” with means ranging from 3.07 to 3.49.

Table (5.2.2.2) shows the reported recall in the four types of print media by country.

Table 5.2.2.2: Reported recall of tobacco advertising in print media by Member State

	All countries (5526)	DE (501)	DK (504)	EL (507)	ES (501)	FR (501)	HU (500)	LT (503)	NL (506)	PL (502)	PT (500)	UK (501)
National and local newspapers & magazines	3.07	3.06	3.37	2.60	2.70	3.10	3.16	3.43	3.33	2.95	2.98	3.06 ^{###}
International newspapers & magazines	3.25	3.19	3.43	2.85	2.97	3.25	3.24	3.60	3.54	3.25	3.23	3.20 ^{###}
Magazines produced for airplanes, ships and other means of transport	3.43	3.37	3.42	3.23	3.21	3.45	3.54	3.76	3.58	3.51	3.49	3.21 ^{###}
Print media aimed primarily at young people (<age of 18)	3.49	3.43	3.61	3.19	3.28	3.49	3.50	3.72	3.68	3.50	3.54	3.49 ^{###}

Mean score (0.00): 1= 'Often' ; 2= 'Occasionally' ; 3= 'Very rarely' ; 4= 'Never'

Base number (xxxx): number of people surveyed in the sample considered

ANOVA's for differences by country: # p<0.05; ## p<0.01; ### p<0.001. Significant results indicate that not all countries are equal.

Reported recall of tobacco advertising in national and local newspapers and magazines

As shown in table 5.2.2.2, people surveyed recalled tobacco advertising in national and local newspapers and magazines on average very rarely ($M=3.07$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 4,967 people surveyed who reported using the media was $M=2.96$, indicating that, on average, those who used this print media very rarely recalled tobacco advertising.

The frequency of recall of tobacco advertising in this print media differed by country ($F(10, 5515)=33.7$, $p<0.001$). The mean frequency of reported recall was 2.60 in Greece and 2.70 in Spain, therefore on average it was seen between occasionally and very rarely. However, the mean frequencies in Lithuania, Denmark and the Netherlands were 3.43, 3.37 and 3.33 respectively, indicating that advertising was seen between very rarely and never on average.

In addition, overall, young adults (15 to 24 years old) recalled more frequent ($M=3.02$) tobacco advertising in national and local newspapers and magazines than adults (over 25) ($M=3.08$) ($t(2613)=-2.07$, $p<0.05$).

Moreover, across all countries smokers recalled tobacco advertising more frequently ($M=3.01$) than non-smokers ($M=3.10$) ($t(3843)=3.08$, $p<0.01$).

Reported recall of tobacco advertising in international newspapers and magazines

As shown in table 5.2.2.2, people surveyed recalled tobacco advertising in international newspapers and magazines on average very rarely ($M=3.25$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 3,721 people surveyed who reported using the media was of 2.89 indicating that, on average, those who used this print media very rarely recalled tobacco advertising.

The frequency of recall of tobacco advertising in this print media channel differed by country ($F(10, 5515)=27.1$, $p<0.001$). The mean recall frequencies in Greece and Spain were $M=2.85$ and $M=2.97$ respectively, therefore advertising was very rarely seen on average, while it was $M=3.60$ in Lithuania, indicating that it was either very rarely or never seen.

In addition, overall, young adults recalled more frequent ($M=3.16$) tobacco advertising in international newspapers and magazines than adults ($M=3.28$) ($t(2539)=-4.25$, $p<0.001$). Moreover, across all countries, smokers recalled more frequent ($M=3.16$) tobacco advertising than non-smokers ($M=3.30$) ($t(3743)=4.80$, $p<0.001$).

Reported recall of tobacco advertising in magazines produced for airplanes, ships and other means of transport

As shown in table 5.2.2.2, people surveyed recalled tobacco advertising in magazines produced for airplanes, ships and other means of transport on average between very rarely and never ($M=3.43$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 2,841 people surveyed who reported using the media was of 2.89 indicating that, on average, those who used this print media very rarely recalled tobacco advertising.

The frequency of recall of tobacco advertising in this print media differed by country ($F(10, 5515)=18.7, p< 0.001$). The mean reported recall was $M=3.21$ in the UK and Spain, as well as $M=3.23$ in Greece, indicating that advertising was very rarely seen in these countries. However, it was $M=3.76$ in Lithuania, therefore advertising was almost never seen in this country.

There was no difference, by age, in the frequency of recalling advertising in magazines produced for airplanes, ships and other means of transport ($t(2536)= -1.47, p> 0.05$).

Moreover, across all countries, smokers recalled tobacco advertising more frequently ($M= 3.38$) than non-smokers ($M= 3.46$) ($t(3792)= 2.89, p< 0.01$).

Reported recall of tobacco advertising in print media aimed primarily at young people (<age of 18)

As shown in table 5.2.2.2, overall, people surveyed recalled tobacco advertising in print media primarily aimed at young people (<age of 18) on average between very rarely and never ($M=3.49$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 2,923 people surveyed who reported using the media was of 3.04 indicating that, on average, those who used this print media very rarely recalled tobacco advertising.

The frequency of recall of tobacco advertising for this type of print media differed by country ($F(10, 5515)= 16.5, p< 0.001$). The mean frequency of reported recall was $M=3.19$ in Greece, therefore advertising was very rarely seen, while it was almost never seen in Lithuania ($M=3.72$).

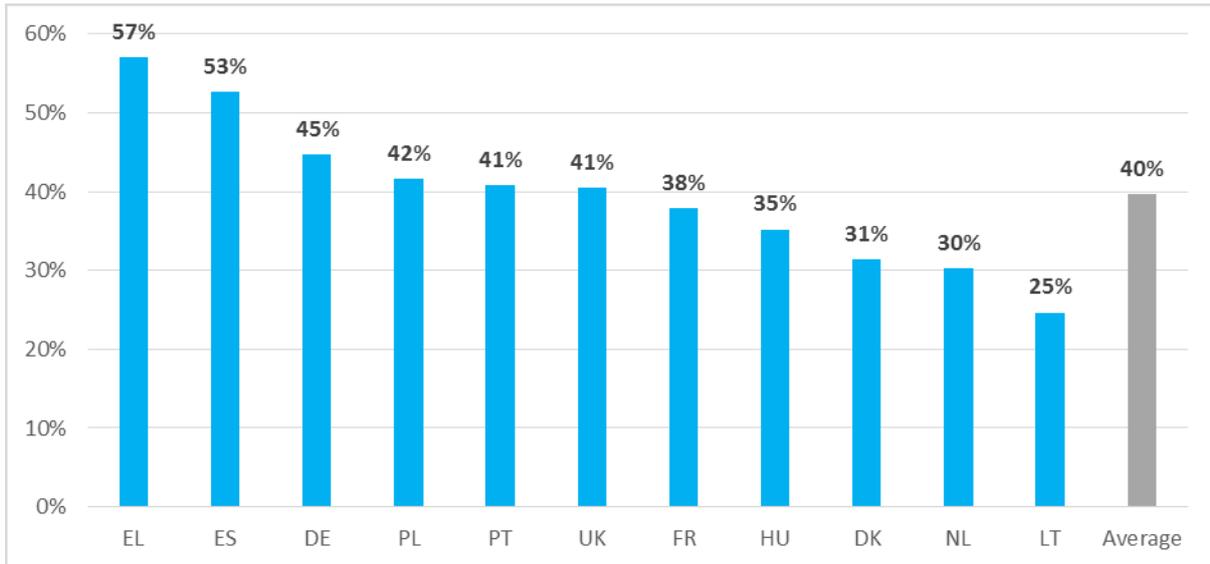
Young adults recalled more frequent ($M=3.35$) tobacco advertising in print media primarily aimed at young people (<age of 18) than adults ($M=3.55$) ($t(2319)= -6.97, p< 0.001$).

Moreover, across all countries, smokers recalled tobacco advertising more frequently ($M= 3.44$) than non-smokers ($M= 3.52$) ($t(3764)= 3.00, p< 0.05$).

5.2.2.3 REPORTED RECALL OF TOBACCO ADVERTISING IN AT LEAST ONE TYPE OF PRINT MEDIA

Although recall was low on average across the sample (cf. means in table 5.2.2.2), a significant portion of respondents reported recalling tobacco advertising either “often” or “occasionally” in at least one type of print media.

Figure 5.2.2.3: Reported recall of any form of tobacco advertising in at least one type of print media (% share of respondents who said often or occasionally for at least one print media, per country)



The chart shows the percentage of people in each country who responded “Often” or “Occasionally” for recall in at least one type of print media. The types of print media enquired about were: national and local newspapers & magazines, international newspapers & magazines, magazines produced for airplanes, ships and other means of transport, and print media aimed primarily at young people (<age of 18). All 5,526 individuals surveyed were taken into account in these values, not only the ones who reported using the print media.

As shown in figure 5.2.2.3, on average 40% of all those surveyed reported to have often or occasionally observed tobacco advertising in *at least one* of the four types of print media. These percentage rates for reported recall of tobacco advertising differed by country ($\chi^2(10)= 191.2, p< 0.001$). This figure was of 57% in Greece and 53% in Spain. It is interesting to note that in Lithuania, at the lower end of the scale, still one out of four people surveyed still reported to recall seeing tobacco advertising in at least one type of print media at least occasionally.

Indeed, even though the average reported recall figures were low across all types of print media (cf. table 5.2.2.2) this does not mean that a considerable proportion of the population did not report recalling tobacco advertising in print media.

Comparisons between countries identified as having tobacco advertising expenditure (Greece, Spain, Poland and Germany)⁹ and those with no tobacco advertising expenditure indicated that recall of tobacco advertising was higher in countries with tobacco advertising expenditure (49 %) compared

⁹ Lithuania was excluded from this analysis as the advertising expenditure in Lithuania was negligible.

with countries having no tobacco expenditure (40 %) ($\chi^2(1)= 84.65$, $p < 0.001$). Furthermore, when comparing Greece and Spain combined (countries with the two seemingly highest percentage rates of recall) to Poland and Germany combined, the groups' recall percentage rates also differed ($\chi^2(1)= 27.49$, $p < 0.001$). Recall did not differ significantly between Greece and Spain ($\chi^2(1)= 1.89$, $p > 0.05$).

5.2.2.4 REPORTED RECALL OF E-CIGARETTE ADVERTISING IN PRINT MEDIA

The following section presents the reported recall of e-cigarette advertising in the four types of print media considered. It should be noted that the frequencies of reported use and recall are not strongly correlated. Indeed, for national and international newspapers and magazines, the correlation between the means of reported use and recall was 0.277 and 0.169 respectively, while it was of 0.166 for magazines produced for airplanes, ships and other means of transport and 0.0702 for print media aimed at young people (<18) across all countries surveyed.

On average and across the four types print media considered, the people surveyed reported to recall e-cigarette advertising between "very rarely" and "never". The mean recall frequency for national and local newspapers and magazines was $M=3.09$ (i.e. very rarely), and $M=3.30$ (i.e. very rarely) for international newspapers and magazines (cf. table 5.2.2.4). Furthermore, mean reported recall was $M=3.51$ (i.e. between very rarely and never) in magazines produced for airplanes, ships and other means of transport, and $M=3.52$ (i.e. between very rarely and never) in print media aimed at young people (<18).

Table 5.2.2.4: Reported recall of e-cigarette advertising in print media by Member State

	All countries (5526)	DE (501)	DK (504)	EL (507)	ES (501)	FR (501)	HU (500)	LT (503)	NL (506)	PL (502)	PT (500)	UK (501)
National and local newspapers & magazines	3.09	3.30	3.40	2.84	2.75	3.05	3.20	3.50	3.22	2.91	2.98	2.89 ^{###}
International newspapers & magazines	3.30	3.39	3.53	3.03	3.01	3.21	3.30	3.69	3.52	3.27	3.25	3.13 ^{###}
Magazines produced for airplanes, ships and other means of transport	3.51	3.54	3.64	3.36	3.27	3.43	3.54	3.82	3.69	3.55	3.57	3.24 ^{###}
Print media aimed primarily at young people (<age of 18)	3.52	3.53	3.63	3.30	3.30	3.50	3.52	3.74	3.68	3.49	3.56	3.46 ^{###}

Mean score (0.00): 1= 'Often'; 2= 'Occasionally'; 3= 'Very rarely'; 4= 'Never'

Base number (xxxx): number of people surveyed in the sample considered

ANOVA's for differences by country: # $p < 0.05$; ## $p < 0.01$; ### $p < 0.001$. Significant results indicate that not all countries are equal.

Reported recall of e-cigarette advertising in national and local newspapers and magazines

As shown in table 5.2.2.4, people surveyed recalled e-cigarette advertising in national and local newspapers and magazines on average very rarely ($M=3.09$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 4,967 people surveyed who reported using the media was of 2.99, indicating that, on average, those who used this print media very rarely recalled e-cigarette advertising.

The frequency of recall of tobacco advertising for this type of print media differed by country ($F(10, 5515)= 32.2, p < 0.001$). The mean frequency of reported recall was between occasionally and very rarely in Spain ($M= 2.75$), while in Lithuania, people surveyed responded on average between very rarely and never ($M= 3.50$).

In addition, young adults (15 to 24 years old) recalled more frequent ($M= 3.03$) e-cigarette advertising in national and local newspapers and magazines than adults (over 25) ($M= 3.12$) ($t(2562)= -2.64, p < 0.01$).

Moreover, e-cigarette users recalled more frequent ($M= 2.58$) e-cigarette advertising in this print media than non-users overall ($M= 3.13$) ($t(359)= 8.97, p < 0.001$).

Reported recall of e-cigarette advertising in international newspapers and magazines

As shown in table 5.2.2.4, people surveyed recalled e-cigarette advertising in international newspapers and magazines on average very rarely ($M= 3.30$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 3,721 people surveyed who reported using the media was 2.97, indicating that, on average, even from the subset of those who used this print media very rarely recalled e-cigarette advertising.

The frequency of recall of tobacco advertising for this type of print media differed by country ($F(10, 5515)= 27.4, p < 0.001$). It was of $M=3.01$ in both Spain and Greece, as well as $M=3.13$ in the UK, indicating that advertising was very rarely seen in these countries. However, it was $M=3.69$ in Lithuania, $M=3.52$ in the Netherlands and $M=3.53$ in Denmark, therefore it was either very rarely or never seen in these countries.

In addition, young adults recalled more frequent ($M=3.18$) e-cigarette advertising in international newspapers and magazines than adults ($M=3.35$) ($t(2471)= -5.84, p < 0.001$).

Reported recall of e-cigarette advertising in magazines produced for airplanes, ships and other means of transport

As shown in table 5.2.2.4, people surveyed recalled e-cigarette advertising in magazines produced for airplanes, ships and other means of transport on average between very rarely and never ($M= 3.51$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 2,841 people surveyed who reported using the media was 3.05, indicating that, on average, even those who used this print media very rarely recalled e-cigarette advertising.

The frequency of recall of tobacco advertising for this type of print media differed by country ($F(10, 5515) = 23.2, p < 0.001$). The mean frequency was of $M=3.24$ in the UK, therefore advertising was very rarely seen, while the mean was $M=3.82$ in Lithuania, indicating that it was almost never seen in this country on average.

In addition, young adults recalled more frequent ($M=3.45$) e-cigarette advertising in magazines produced for airplanes, ships and other means of transport than adults ($M= 3.53$) ($t(2431) = -3.01, p < 0.01$).

Moreover, e-cigarette users recalled more frequent ($M= 3.06$) e-cigarette advertising in this print media than non-users overall ($M= 3.54$) ($t(348) = 7.76, p < 0.001$).

Reported recall of e-cigarette advertising in print media aimed primarily at young people (<age of 18)

As shown in table 5.2.2.4, people surveyed recalled e-cigarette advertising in print media aimed primarily at young people (<age of 18) on average between very rarely and never ($M= 3.52$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 2,923 people surveyed who reported using the media was of 3.09, indicating that, on average, those who used this print media very rarely recalled e-cigarette advertising.

The frequency of recall of tobacco advertising for this type of print media differed by country ($F(10, 5515) = 13.3, p < 0.001$). The mean frequency of reported recall was $M=3.30$ in both Greece and Spain, therefore advertising was on average very rarely seen, while it was almost never seen in Lithuania ($M=3.74$).

In addition, young adults recalled more frequent ($M= 3.41$) e-cigarette advertising in print media aimed primarily at young people (<age of 18) than adults ($M= 3.56$) ($t(2376) = -5.63, p < 0.001$).

Moreover, e-cigarette users recalled more frequent ($M= 3.14$) e-cigarette advertising in this print media than non-users overall ($M= 3.54$) ($t(350) = 6.62, p < 0.001$).

5.2.2.5 REPORTED RECALL OF E-CIGARETTE ADVERTISING IN AT LEAST ONE TYPE OF PRINT MEDIA

The figure below (5.2.2.5) shows the percentage of respondents per country who reported to recall e-cigarette advertising at least occasionally in at least one type of print media out of all people surveyed.

Figure 5.2.2.5: Reported recall of any form of e-cigarette advertising in at least one type of print media (% share of respondents who said often or occasionally for at least one print media, per country)

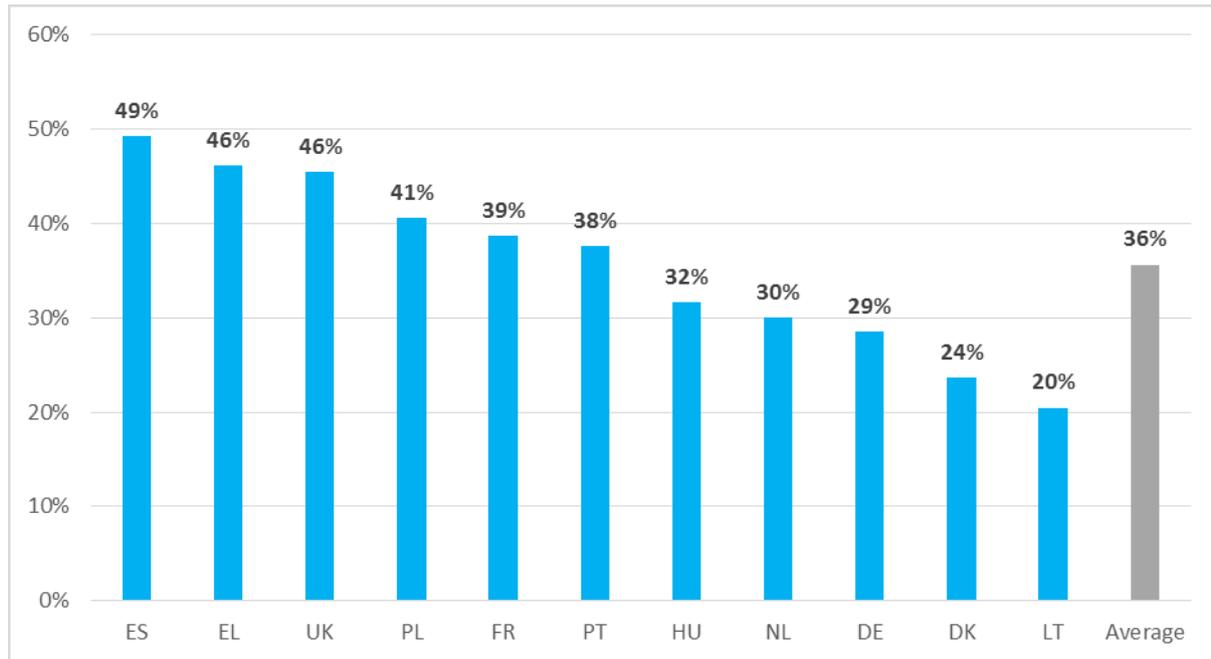


Chart shows the percentage of people in each country who responded “Often” or “Occasionally” to at least one type of print media. The types of print media enquired about were: national and local newspapers & magazines, international newspapers & magazines, magazines produced for airplanes, ships and other means of transport, and print media aimed primarily at young people (<age of 18). All 5,526 individuals surveyed were taken into account in these values, not only the ones who reported using the print media.

Figure 5.2.2.5 represents the percentage of people surveyed who reported to have “often” or “occasionally” recalled e-cigarette advertising in at least on type of print media. These percentage rates for reported recall of e-cigarette advertising differed by country ($\chi^2(10)= 198.5, p< 0.001$).

Overall, the percentage of reported recall in at least one type of print media was slightly lower for e-cigarette than for tobacco advertising. 49% of respondents in Spain reported recall of e-cigarette advertising in at least one type of print media, while the percentage rates were both 46% in Greece and the UK. However, Denmark and Lithuania reported recall rates of 24% and 20% respectively.

Overall, although reported recall of e-cigarette advertising across all print media was not frequent, it at least one person out of four in all countries reported to recall seeing it either often or occasionally in at least one type of print media.

Comparisons between countries identified as having e-cigarette advertising expenditure (Poland, the UK, Spain, France and Denmark)¹⁰ and those with no such spend indicated that recall was higher in countries with e-cigarette advertising spend (40 %) compared with 35 % in countries with no e-cigarette advertising spend ($\chi^2(1)= 12.04, p< 0.001$).

5.2.3 SUMMARY AND SYNTHESIS

Advertising spend data

The Kantar data showed that print advertising by tobacco companies had been purchased in France, Germany, Greece, Lithuania, Poland, and Spain, and that print advertising for e-cigarettes had been purchased in Denmark, France, Lithuania, Poland, Spain and the UK between 2013 and 2014.

All of the tobacco-related print advertising in France and most of the tobacco-related print advertising in Germany was in publications aimed at tobacco retailers/the tobacco trade, while in Greece, Spain and Lithuania, all of the tobacco-related print advertising was in publications aimed at the general public. In Poland, the tobacco-related print advertising was divided between the two types of publication.

In the publications aimed at the general public, the tobacco-related advertising fell into the following categories:

- Messages relating to counterfeit and smuggled tobacco
- Professional recruitment ads
- Corporate social responsibility (CSR) statements
- Sponsorship of cultural events.

The vast majority of the e-cigarette related marketing was in publications aimed at the general public. Because information was provided on the publication titles, we made an expert assessment as to whether the audience was 'mostly adult', 'mostly youth', or 'mixed'. We defined 'mostly youth' as aged 16-25. The majority of print publications in which advertising had been placed, for both tobacco and e-cigarettes, were assessed as having a 'mostly adult' readership, with a small proportion defined as having a 'mixed' readership, i.e. likely to appeal to and be seen by both young people and adults. In one country, Poland, a small proportion of the e-cigarette advertising was assessed as having been placed in publications with a 'mostly youth' readership.

The Kantar data did not provide any information on advertising spend in 'cross-border' titles such as airline magazines.

¹⁰ Lithuania was excluded from the analysis as it had negligible expenditure on e-cigarette advertising.

When print advertising share was examined (the proportion of all print advertising spend in each country which was related to tobacco and e-cigarettes), the highest relative exposure of the general public to print advertising linked to tobacco was in Greece, with over 2,500 euros per million euros of advertising spend. There was lower exposure in Poland and Spain, with a negligible amount of exposure in Lithuania and Germany. As we note earlier in this section, as far as we could establish, the advertising linked to tobacco mostly comprised statements about smuggling and illicit tobacco, CSR statements, professional recruitment and sponsorship of cultural events.

The highest relative exposure of the general public to e-cigarette advertising in print media was in Poland, with nearly 3,800 euros per million euros of advertising spend, followed by the UK and Spain, with much smaller amounts in France and Denmark and a negligible amount in Lithuania.

Citizens' survey data

Citizens reported consuming national and local newspapers and magazines between weekly and fortnightly, and international newspapers and magazines on a monthly basis. Magazines produced for airplanes, ships and other means of transport were read on average less than monthly, while print media aimed primarily at young people (<age of 18) was overall read between monthly and less than monthly. Young adults reported slightly more frequent print media consumption than adults in all types of print media considered. However, there was no correlation between the use and recall of advertising for any of the four types of print media.

There was low claimed recall of tobacco advertising in print media overall, with citizens reporting that on average they recalled seeing it between 'very rarely' and 'never'. Overall, young adults reported recalling more frequent advertising in print media than adults, except regarding magazines produced for airplanes, ships and other means of transport. Furthermore, overall, smokers recalled more frequent tobacco advertising in print media than non-smokers. When asked if they recalled seeing tobacco advertising in specific kinds of print media, 40% of citizens claimed to recall seeing tobacco advertising at least 'occasionally' in at least one type of print media.

There was low claimed recall of e-cigarette advertising in print media overall, with citizens reporting that on average they recalled seeing it between 'very rarely' and 'never'. Overall, young adults reported recalling more frequent advertising in all four types of print media than adults. Furthermore, overall, e-cigarette users recalled more frequent e-cigarette advertising in print media than non-users. When asked if they recalled seeing e-cigarette advertising in specific kinds of print media, 36% of citizens claimed to recall seeing tobacco advertising at least 'occasionally' in at least one type of print media.

Synthesis of findings

Tobacco advertising exposure

Actual print advertising by tobacco companies (as indicated by advertising spend data) in publications aimed at the general public was found in Greece, Spain, Poland, Germany and Lithuania (the amount of advertising in Lithuania was negligible); as stated in the methodology section, Hungary and the Netherlands were not included in the Kantar data. This advertising did not comprise brand/product advertising, but instead comprised information and messages relating to counterfeit and smuggled tobacco, corporate social responsibility statements, professional recruitment ads and sponsorship of cultural events. When print advertising share was examined (the proportion of all print advertising spend in each country which was related to tobacco), the highest relative exposure of the general

public to print advertising linked to tobacco was in Greece, with over 2,500 euros per million euros of total advertising spend. There was lower exposure in Poland and Spain, with a negligible amount of exposure in Lithuania and Germany.

In the citizens' survey, respondents claimed to recall seeing tobacco advertising 'very rarely' or 'never' in print media in general, which is consistent with the advertising spend data and with the legislative situation. However, when asked if they recalled seeing tobacco advertising in specific types of print media, 40% claimed to recall seeing it at least occasionally in at least one type of print media. As noted above, this may reflect recall of an image or message which has been mistaken for advertising, or it may reflect recall of advertising from several years previously (even though respondents were asked about recall in the past 12 months). Despite this caveat, the citizens' survey data show some consistent patterning by country, with claimed recall in at least one specific type of print media being higher in countries with tobacco advertising expenditure (Greece, Spain, Germany and Poland¹¹) compared with countries having no tobacco advertising expenditure. This suggests that although the citizens' recall data do not on their own reflect actual exposure to tobacco advertising, the citizens' recall data taken together with the advertising spend data can help to provide a triangulated picture of both what advertising is being purchased and the extent to which it appears to stick in citizens' minds in different countries.

When we look at the advertising share data (the proportion of all advertising in a country which is related to tobacco), the highest relative exposure of the general public to print advertising linked to tobacco was in Greece, with over 2,500 euros per million euros of total advertising spend. This is consistent with citizens in Greece claiming the highest rates of recall of tobacco advertising in print media.

Overall, then, there is some consistency in relation to print advertising between the advertising spend data, the advertising share analysis and the citizens' survey data on claimed recall, in terms of how the countries compare, with certain countries tending to score more highly on all three sets of measure. As we note above, the print advertising purchased by tobacco companies did not comprise brand/product advertising, but instead comprised information and messages relating to counterfeit and smuggled tobacco, corporate social responsibility statements, professional recruitment ads and sponsorship of cultural events. The data taken together here suggest that this may be being confused in citizens' minds with advertising of tobacco in general.

The citizens' survey data suggest that young people tended to have higher claimed recall of tobacco advertising in print media. The advertising spend data analysis suggested that the print publications in which advertising had been placed by tobacco companies were aimed at a '*mostly adult*' readership (e.g. national and local newspapers) or, in some cases, at a '*mixed*' readership (i.e. likely to appeal to and be seen by both young people and adults), with none of the tobacco-related advertising being found in publications aimed at a '*mostly youth*' readership. However, according to the citizens' survey data, young people were more likely to read newspapers and magazines than to read print media primarily aimed at young people. It is therefore difficult to assess whether young people's exposure to this type of advertising is a particular source of concern.

¹¹ Lithuania was excluded from this analysis, as tobacco advertising expenditure in Lithuania was negligible

E-cigarette advertising exposure

Actual print advertising for e-cigarettes (as indicated by advertising spend data) in publications aimed at the general public was found in Denmark, France, Lithuania, Poland, Spain and the UK. When print advertising share was examined (the proportion of all print advertising spend in each country which was related to e-cigarettes), the *highest relative exposure of the general public to e-cigarette advertising in print media was in Poland*, with nearly 3,800 euros per million euros of advertising spend, followed by the UK and Spain, with much smaller amounts in France and Denmark and a negligible amount in Lithuania.

In the citizens' survey, respondents claimed to recall seeing e-cigarette advertising 'rarely' or 'never' in print media in general, which is perhaps consistent with the emerging nature of this market. However, when asked if they recalled seeing e-cigarette advertising in specific types of print media, 36% claimed to recall seeing it at least occasionally in at least one type of print media. As with the claimed tobacco advertising recall data, we cannot rule out the possibility that citizens may be thinking of other types of image or message when they claim that they recall seeing e-cigarette advertising. The fact that citizens in Greece – where no advertising spend on e-cigarettes was recorded by Kantar during the period of interest – had among the highest levels of claimed recall of e-cigarette advertising in the citizens' survey suggests that there have been some confusion in citizens' minds with tobacco advertising or other types of advertising and messages, or that citizens may have been recalling advertising which they had seen outside of the past 12 months, or that some advertising occurred which was not detected in the monitoring. Citizens in Germany, Hungary and the Netherlands (where no advertising spend data were recorded) also reported recalling e-cigarette advertising.

The highest level of exposure (in terms of advertising share) to e-cigarette advertising was found in Poland, followed by the UK and Spain. Citizens' recall to some extent reflected this, with citizens in the UK and Spain also having relatively high levels of claimed recall of e-cigarette advertising in at least one type of print media. As noted above, the e-cigarette market is still evolving, and recall of advertising for new products may take longer to filter through into public consciousness.

As with tobacco, young people tended to have higher claimed recall of e-cigarette advertising in print media than did adults. Again, as with tobacco advertising, the majority of the print publications in which advertising had been placed were aimed at a '*mostly adult*' readership (e.g. national and local newspapers) or at a '*mixed*' readership (i.e. likely to appeal to and be seen by both young people and adults). Only in Poland was some of the e-cigarette advertising found to have been placed in publications aimed at a '*mostly youth*' readership, although this was a small proportion of the overall e-cigarette advertising in Polish print media. It is therefore difficult to assess whether young people's exposure to this type of advertising is a particular source of concern.

5.3 WORK PACKAGE 3: INTERNET AND MOBILE APPLICATIONS

The aim of this work package was to describe and assess exposure to commercial communications for tobacco and e-cigarettes online (including mobile applications) in the selected countries. The study was interested in a wide range of types of content, including paid advertising and brand-related content on social media.

Three methods were used to provide information on exposure to tobacco and e-cigarette marketing content online:

- Analysis of advertising spend data
- Citizens' Survey
- Key informants' survey

As outlined in the Methods section, Kantar stated that it did not monitor tobacco or e-cigarette advertising in any channel in Hungary or the Netherlands because no advertising was permitted. Hungary and the Netherlands are therefore not included in the advertising spend tables in this section.

5.3.1 ANALYSIS OF ADVERTISING SPEND DATA

Amount of advertising spend

Data on advertising spend in internet media were provided by Kantar for **e-cigarettes** (Denmark, France, Lithuania, Poland, Spain, UK). There was no **tobacco** advertising spend in internet media recorded in the Kantar data. Kantar did not monitor internet advertising in Bulgaria and Greece, therefore we cannot conclude from the data whether any internet advertising activity occurred for either product category in those two countries. Kantar stated that it had not recorded any internet advertising activity for e-cigarettes in Germany, although enquiries made by the academic team suggested that some isolated instances of e-cigarette advertising online may have occurred during the period of interest.

Table 5.3.1.1 provides the overall totals for advertising spend in internet media.

Table 5.3.1.1: Total spend, mid 2013-mid 2014, internet advertising, tobacco and e-cigarettes, euros

Country	Tobacco	E-cigarettes
Bulgaria	Not monitored	Not monitored
Denmark	None	82,186
France	None	261,603
Germany	None	None
Greece	Not monitored	Not monitored
Lithuania	None	6,068
Poland	None	1,134,341
Spain	None	None
UK	None	470,495

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It is worth noting that although Kantar reported that it did not monitor e-cigarette advertising on the internet in the Netherlands and Hungary because advertising was said to not be permitted, several examples of e-cigarette advertising in Dutch were found on YouTube, as well as various online promotions (see Sections 5.3.3 and 5.6.2 below).

Following the approach adopted for print media, we examined whether we could distinguish, in the data, advertising on websites aimed at **the general public** from advertising on websites aimed at **retail/trade**. Although some of the websites contained information of particular interest to businesses (for example, information on local businesses, professional career opportunities etc.), all the websites were able to be accessed by the research team (i.e. they were *not restricted*) and contained information which would be of *potential interest to the general public*. All internet advertising was therefore judged to be **aimed at the general public**.

Potential exposure of young people to internet advertising

We then attempted to assess the **type of user profile** of the websites on which advertising had been placed, in order to assess the extent to which young people were potentially exposed to advertising.

As described in the Methods section above, this was done by assessing each website title against a set of criteria, and by making an expert assessment as to whether the user profile for the website was '*mostly adult*', '*mostly youth*', or '*mixed*'. We defined 'youth' as aged 16-25.

The spend data were then broken down by these categories to illustrate the extent of spend in internet websites for '*mostly adult*', '*mostly youth*' and '*mixed*' user profiles (Table 5.3.1.2; there is no equivalent table for tobacco advertising as no tobacco advertising in internet media was recorded in the Kantar data). The table shows that all or most of the internet advertising for e-cigarettes in Denmark, France and the UK was placed on websites with 'mostly adult' or 'mixed' user profiles. In Poland, however, most of the e-cigarette advertising was placed on websites categorised as having 'mostly youth' user profiles. Websites which were categorised in this way included video game sites, cartoon/comic sites, and music sites.

Table 5.3.1.2: Total spend, internet advertising, E-CIGS, broken down by website user profile

Country	Total, general public media	Mostly adult	Mixed	Mostly youth
Bulgaria	Not monitored	-	-	-
Denmark	82,186	73,662	8,524	0
France	261,603	21,396*	118,961*	18,467*
Germany	None	-	-	-
Greece	Not monitored	-	-	-
Lithuania	6,068	6,068	0	0
Poland	1,134,341	40,820	176,265	917,257
Spain	None	-	-	-
UK	470,495	409,090	41,434	19,971

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* Data not available for all websites

Tobacco and e-cigarette internet advertising share: a comparative assessment of countries¹²

Data on all advertising spend in 2013 were available from WARC, the World Advertising Research Centre. The data for internet advertising are presented below in Table 5.3.1.3. As can be seen, the highest total spend on internet advertising, for all products, was in the UK, followed by Germany, France and the Netherlands.

¹² Tobacco and e-cigarette print advertising share was calculated for all eleven countries, including Hungary and the Netherlands.

Table 5.3.1.3: Total internet advertising spend, 2013, by country

Country	Total spend in EUR (millions): Internet advertising
Bulgaria	25.3
Denmark	628.3
France	3494.0
Germany	4676.2
Greece	129.0
Hungary	135.8
Lithuania	11.3
Netherlands	1311.8
Poland	549.1
Spain	901.0
UK	7324.6

Date Created: 17 March 2015 12:15

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<http://www.warc.com/NotesOnAdspendData>

We then calculated the **advertising share for tobacco and e-cigarettes**; that is, how much of the overall spend on internet advertising in each country was made up of tobacco and e-cigarette advertising. *The amount of tobacco and e-cigarette advertising spend was generally very low in relation to the total spend (in most cases, less than 1% of the total spend)*. In order to make the data easier to compare, we therefore made the following calculation for each media channel in each country:

For every million euros spent on total advertising in 2013, how many euros were spent on tobacco advertising and on e-cigarette advertising?

It should be noted that while the WARC data on total advertising spend related to the full year 2013, the Kantar data related to mid-2013 to mid-2014.

Table 5.3.1.4 presents the advertising share data for internet advertising. We can see that the *highest relative exposure of the general public to internet advertising for e-cigarettes was in Poland*, with just over 2,000 euros per million euros of advertising spend, followed by Lithuania with over 500 euros per million euros of advertising spend. Denmark, France and the UK had much smaller amounts. As we note above, internet advertising in Bulgaria and Greece was not monitored by Kantar, and therefore this calculation could not be made for those countries.

Table 5.3.1.4: For every million euros spent on internet advertising in 2013, how many euros were spent (mid 2013-mid 2014) on (a) tobacco advertising, and (b) e-cigarette advertising?¹³

Country	Tobacco advertising	E-cigarette advertising
Bulgaria	Not monitored	Not monitored
Denmark	0	131
France	0	75
Germany	0	0
Greece	Not monitored	Not monitored
Hungary	0	0
Lithuania	0	537
Netherlands	0	0
Poland	0	2066
Spain	0	0
UK	0	64

Source: WARC and Kantar

WARC: Date Created: 17 March 2015 12:15

© Warc (www.warc.com), 2015. Please refer to notes on adspend data for further detail and source information.

<http://www.warc.com/NotesOnAdspendData>

KANTAR: Data/figures/information provided by Kantar Media - All rights reserved

5.3.2 CITIZENS' SURVEY

In the survey, 5,526 individuals from eleven EU countries were asked how frequently they used in eight different types of internet and mobile applications: e-commerce websites (Amazon, shops, etc.), online retailers of tobacco and related products, online retailers of electronic cigarettes and related products, online search engines (Google, Yahoo, etc.), social media (Facebook/Twitter, etc.), websites that stream online video clips (YouTube, etc.), online games, and appstore or apps downloaded from appstores for mobile devices (e.g. smartphones). Responses were recorded on a seven point scale: 'Daily'; '2-3 times a week'; 'Weekly'; 'Once every two weeks'; 'Monthly'; 'Less than monthly'; and 'Never' (ranked on a scale of 1 to 7). For those media which they used they were then asked how frequently they noticed tobacco advertising and e-cigarette advertising in each type of media. Responses were recorded separately for tobacco advertising and e-cigarette advertising on a four point scale: 'Often', 'Occasionally', 'Very rarely' or 'Never' (ranked from 1 to 4).

The tables in the following section present the mean values for the frequency of using each of the eight internet and mobile application media and mean values for the frequencies of recalling tobacco advertising and recalling e-cigarette advertising in the same media.

¹³ The spend is shown as 0 for Hungary and the Netherlands because Kantar had no data on spend in those two countries, as outlined in section 4.2

5.3.2.1 REPORTED USE OF INTERNET AND MOBILE APPLICATION MEDIA

Table 5.3.2.1: Internet and mobile application media use profile – Mean frequency of use

	Total sample (5526)	Age		Member State										
		Young adults (15-24) (1485)	Adults (25+) (4041)	DE (501)	DK (504)	EL (507)	ES (501)	FR (501)	HU (500)	LT (503)	NL (506)	PL (502)	PT (500)	UK (501)
E-commerce websites (Amazon, shops, etc)	4.19	3.86	4.32***	3.79	4.39	3.97	3.49	3.94	4.40	5.68	4.77	3.95	4.39	3.37###
Online retailers of tobacco and related products	6.17	6.02	6.23***	6.04	6.47	5.84	5.60	6.16	6.07	6.69	6.56	6.18	6.48	5.83###
Online retailers of electronic cigarettes and related products	6.15	6.04	6.20**	6.07	6.43	5.92	5.64	6.08	6.10	6.64	6.56	6.08	6.44	5.74###
Online search engines (Google, Yahoo, etc)	1.85	1.81	1.87	2.13	1.98	1.48	1.80	2.18	1.83	2.01	1.98	1.62	1.56	1.81###
Social media (Facebook/Twitter, etc)	2.38	1.94	2.55***	3.04	2.49	1.91	2.20	2.99	2.07	2.40	2.41	2.36	1.84	2.52###
Websites that stream online video clips (YouTube, etc)	2.96	2.21	3.24***	3.46	3.36	2.20	2.65	3.42	2.59	3.11	3.61	2.68	2.57	2.92###
Online games	4.18	3.79	4.32***	4.36	4.69	3.67	3.78	4.46	3.43	4.84	4.57	4.10	3.83	4.21###
Appstore or apps downloaded from appstores for mobile devices (e.g. smartphones)	4.48	3.64	4.80***	4.57	4.52	4.11	3.82	4.75	4.64	5.34	4.40	4.51	4.47	4.19###

Mean score (0.00): 1= 'Daily'; 2= '2-3 times a week'; 3= 'Weekly'; 4= 'Once every two weeks'; 5= 'Monthly'; 6= 'Less than monthly'; 7= 'Never'

Base number (xxxx): number of people surveyed in the sample considered t-tests for differences by age: * $p < 0.05$; ** $p < 0.01$; *** $p < 0.001$

ANOVA's for differences by country: # $p < 0.05$; ## $p < 0.01$; ### $p < 0.001$. Significant results indicate that not all countries are equal.

Table 5.3.2.1 presents mean frequency of reported use of internet and mobile application media in the eleven countries surveyed. On average, respondents used e-commerce websites on a fortnightly basis ($M=4.19$), while online retailers of tobacco and related products and online retailers of electronic cigarettes and related products were used on average less than monthly ($M=6.17$ and $M=6.15$ respectively). In addition, online search engines were reportedly used more than 2-3 times a week on average ($M=1.85$), social media between 2-3 times a week and weekly ($M=2.38$), and websites that stream online video clips were used on average weekly ($M=2.96$). Furthermore, online games and appstore or apps downloaded from appstores for mobile devices were reportedly used between once every two weeks and monthly ($M=4.18$ and $M=4.48$ respectively).

The results also showed that young adults (15-24) reported reading all types of internet and mobile application media, except for online search engines, significantly more frequently than adults (25+). Indeed, for online search engines, the difference between the means of reported use in the two age groups were not significantly different ($t(2672) = -1.10$, $p > 0.05$). However, for e.g. e-commerce websites (Amazon, shops, etc.) the mean for young adults was more than fortnightly ($M=3.86$) compared to less than fortnightly ($M=4.32$) for adults ($t(2678) = -7.67$, $p < 0.001$), for social media it was respectively more than 2-3 times a week on average ($M=1.94$) against between 2-3 times a week and weekly ($M=2.55$) ($t(3281) = -10.59$, $p < 0.001$), and for websites than stream online video clips the mean for young adults was close to 2-3 times a week ($M=2.21$) while it was over weekly ($M=3.24$) for adults ($t(3125) = -18.39$, $p < 0.001$) (cf. Table 5.3.2.1 for all types of media).

Frequency of using each type of media differed across countries (e-commerce websites $F(10, 5515) = 57.79$, $p < 0.001$; online retailers of tobacco and related products $F(10, 5515) = 24.66$, $p < 0.001$; online retailers of electronic cigarettes and related products $F(10, 5515) = 21.87$, $p < 0.001$; online search engines $F(10, 5515) = 9.82$, $p < 0.001$; social media $F(10, 5515) = 16.95$, $p < 0.001$; websites that stream online video clips $F(10, 5515) = 26.65$, $p < 0.001$; online games $F(10, 5515) = 19.00$, $p < 0.001$; and appstore or apps downloaded from appstores for mobile devices $F(10, 5515) = 16.60$, $p < 0.001$).

5.3.2.2 REPORTED RECALL OF TOBACCO ADVERTISING IN INTERNET AND MOBILE APPLICATION MEDIA

The following section presents the reported recall of tobacco advertising in the eight types of internet and mobile application media considered. It should be noted that, for e-commerce websites, online retailers of tobacco and related products, online retailers of electronic cigarettes and related products, and websites that stream online video clips, the frequencies of use and recall of tobacco advertising are strongly correlated (correlations of 0.817, 0.981, 0.973 and 0.843 respectively). Furthermore, a correlation between the frequency means of reported use and recall was also found for appstore or apps downloaded from appstores for mobile devices (0.749). Finally, there was a moderate correlation between use and recall for online search engines (0.579), social media (0.573) and online games (0.666).

Across the eight types of internet and mobile application media considered, participants, on average, reported recalling tobacco advertising “very rarely” or “never” with means ranging from 3.19 for social media to 3.55 for online retailers of tobacco and related products.

Table (5.3.2.2) shows the reported recall in the eight types of internet and mobile application media by country.

Table 5.3.2.2: Reported recall of tobacco advertising in internet and mobile application media by Member State

	Total sample (5526)	DE (501)	DK (504)	EL (507)	ES (501)	FR (501)	HU (500)	LT (503)	NL (506)	PL (502)	PT (500)	UK (501)
E-commerce websites (Amazon, shops, etc)	3.34	3.37	3.59	3.10	3.08	3.27	3.29	3.70	3.64	3.15	3.37	3.22 ^{###}
Online retailers of tobacco and related products	3.55	3.46	3.73	3.34	3.28	3.55	3.44	3.82	3.76	3.54	3.68	3.44 ^{###}
Online retailers of electronic cigarettes and related products	3.54	3.48	3.71	3.35	3.25	3.50	3.46	3.80	3.79	3.51	3.65	3.40 ^{###}
Online search engines (Google, Yahoo, etc)	3.22	3.29	3.50	2.92	2.94	3.17	3.21	3.43	3.46	3.08	3.24	3.15 ^{###}
Social media (Facebook/Twitter, etc)	3.19	3.30	3.46	2.89	3.00	3.25	3.15	3.30	3.48	3.11	3.05	3.14 ^{###}
Websites that stream online video clips (YouTube, etc)	3.27	3.39	3.53	3.04	3.03	3.26	3.23	3.35	3.55	3.17	3.23	3.22 ^{###}
Online games	3.49	3.49	3.67	3.39	3.25	3.42	3.47	3.68	3.619	3.42	3.53	3.39 ^{###}
Appstore or apps downloaded from appstores for mobile devices (e.g. smartphones)	3.52	3.58	3.66	3.39	3.26	3.50	3.53	3.77	3.72	3.38	3.53	3.41 ^{###}

Mean score (0.00): 1= 'Often'; 2= 'Occasionally'; 3= 'Very rarely'; 4= 'Never'

Base number (xxxx): number of people surveyed in the sample considered

ANOVA's for differences by country: # $p < 0.05$; ## $p < 0.01$; ### $p < 0.001$. Significant results indicate that not all countries are equal.

Reported recall of tobacco advertising in e-commerce websites (Amazon, shops, etc.)

As shown in table 5.3.2.2, people surveyed recalled tobacco advertising in e-commerce websites on average very rarely ($M=3.34$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 4,604 people surveyed who reported using the media was $M=3.21$, indicating that, on average, those who used this media also very rarely recalled tobacco advertising.

The frequency of recall of tobacco advertising in this media differed by country ($F(10, 5515)= 27.82$, $p < 0.001$). The mean frequency of reported recall was $M=3.10$ in Greece and $M=3.08$ in Spain. However, the mean frequencies in Lithuania and the Netherlands were 3.70 and 3.64 respectively, indicating that it was seen close to never in these countries. This can be partly explained by the use and recall correlation, and the fact that this media was reported to be used between weekly and fortnightly in Spain ($M=3.49$) and fortnightly in Greece ($M=3.97$) on average, while in Lithuania it was reportedly used close to less than monthly ($M=5.68$) and between fortnightly and monthly in the Netherlands ($M=4.77$) (cf. Table 5.3.2.1).

In addition, overall, young adults (15 to 24 years old) recalled more frequent ($M= 3.23$) tobacco advertising in e-commerce websites than adults (over 25) ($M= 3.38$) ($t(2613)= -5.19$, $p < 0.001$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the media more than monthly ($M=3.86$) while adults reported using it significantly less ($M=4.32$, i.e. between monthly and less than monthly) on average ($t(2678)= -7.67$, $p < 0.001$, cf. Table 5.3.2.1).

Moreover, across all countries smokers recalled tobacco advertising more frequently ($M=3.19$) than non-smokers ($M=3.42$) ($t(3577)= 8.40$, $p < 0.001$).

Reported recall of tobacco advertising in online retailers of tobacco and related products

As shown in table 5.3.2.2, those surveyed recalled tobacco advertising in online retailers of tobacco and related products on average between very rarely and never ($M=3.55$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 1,594 people surveyed who reported using the media was $M=2.44$, indicating that, on average, those who used this media on average either occasionally or very rarely recalled tobacco advertising.

The frequency of recall of tobacco advertising in this media differed by country ($F(10, 5515)= 21.11$, $p < 0.001$). The mean frequency of reported recall was $M=3.28$ in Spain and $M=3.34$ in Greece. However, the mean frequency in Lithuania was 3.82, indicating that it was seen almost never on average in this country. This can be partly explained by the use and recall correlation, and the fact that this media was reported to be used between monthly and less than monthly in Spain ($M=5.60$) and less than monthly in Greece ($M=5.84$) on average, while in Lithuania it was reportedly almost never used ($M=6.69$) (cf. Table 5.3.2.1).

In addition, overall, young adults recalled more frequent ($M=3.48$) tobacco advertising in online retailers of tobacco and related products than adults ($M=3.57$) ($t(2402)= -3.25$, $p < 0.01$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the media less than monthly ($M=6.02$) while adults reported using it significantly less ($M=6.23$, i.e. between less than monthly and never) on average ($t(2678)= -3.98$, $p < 0.001$, cf. Table 5.3.2.1).

Moreover, across all countries smokers recalled tobacco advertising more frequently ($M=3.32$) than non-smokers ($M=3.67$) ($t(3176)= 13.18$, $p < 0.001$).

Reported recall of tobacco advertising in online retailers of electronic cigarettes and related products

As shown in table 5.3.2.2, people surveyed recalled tobacco advertising in online retailers of electronic cigarettes and related products on average between very rarely and never ($M=3.54$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 1,685 people surveyed who reported using the media was $M=2.48$, indicating that, on average, those who used this media on average either occasionally or very rarely recalled tobacco advertising.

The frequency of recall of tobacco advertising in this media differed by country ($F(10, 5515)= 21.04$, $p < 0.001$). The mean frequency of reported recall was $M=3.25$ in Spain. However, the mean frequencies in Lithuania and the Netherlands were 3.80 and 3.79 respectively, indicating that it was seen almost never in these countries. This can be partly explained by the use and recall correlation for this media, and the fact that it was reported to be used between monthly and less than monthly on average in Spain ($M=5.64$), while in Lithuania and the Netherlands it was reportedly used between less than monthly and never ($M=6.64$ and $M=6.56$ respectively) (cf. Table 5.3.2.1).

In addition, overall, young adults recalled more frequent ($M=3.48$) tobacco advertising in online retailers of electronic cigarettes and related products than adults ($M=3.56$) ($t(2451)= -2.61$, $p < 0.01$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the media less than monthly ($M=6.04$) while adults reported using it significantly less ($M=6.20$, i.e. between less than monthly and never) on average ($t(2441)= -3.18$, $p < 0.01$, cf. Table 5.3.2.1).

Moreover, across all countries smokers recalled tobacco advertising more frequently ($M=3.29$) than non-smokers ($M=3.67$) ($t(3118)= 14.25$, $p < 0.001$).

Reported recall of tobacco advertising in online search engines (Google, Yahoo, etc.)

As shown in table 5.3.2.2, people surveyed recalled tobacco advertising in online search engines on average very rarely ($M=3.22$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 5,235 people surveyed who reported using the media was $M=3.17$, indicating that, on average, those who used this media also very rarely recalled tobacco advertising.

The frequency of recall of tobacco advertising in this media differed by country ($F(10, 5515)= 18.00$, $p < 0.001$). The mean frequency of reported recall was $M=2.92$ in Greece and $M=2.94$ in Spain, therefore tobacco advertising was reportedly recalled very rarely on average. However, the mean frequencies in Denmark, the Netherlands and Lithuania were $M=3.50$, $M=3.46$ and $M=3.43$ respectively, indicating that it was seen between very rarely and never in these countries on average. Given the fairly strong use and recall correlation observed for this media (0.579), these results may be partially explained by the frequency of use of the media in these countries (cf. Table 5.3.2.1).

In addition, overall, young adults recalled more frequent ($M=3.11$) tobacco advertising in online search engines than adults ($M= 3.26$) ($t(2534)= -4.48$, $p < 0.001$).

Moreover, across all countries smokers recalled tobacco advertising more frequently ($M=3.06$) than non-smokers ($M=3.30$) ($t(3643)= 7.82$, $p < 0.001$).

Reported recall of tobacco advertising in social media (Facebook/Twitter, etc.)

As shown in table 5.3.2.2, people surveyed recalled tobacco advertising in social media on average very rarely ($M=3.19$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 4,862 people surveyed who reported using the media was $M=3.08$, indicating that, on average, those who used this media also very rarely recalled tobacco advertising.

The frequency of recall of tobacco advertising in this media differed by country ($F(10, 5515)= 15.94$, $p< 0.001$). The mean frequency of reported recall was $M=2.89$ in Greece, therefore tobacco advertising in this media was recalled at a higher frequency than “very rarely” on average in this country. However, the mean frequencies in the Netherlands and Denmark were $M=3.48$ and $M=3.46$ respectively, indicating that tobacco advertising was recalled between very rarely and never in these countries on average. Given the fairly strong use and recall correlation observed for this media (0.573), these results may be partially explained by the frequency of use of the media in these countries (cf. Table 5.3.2.1).

In addition, overall, young adults recalled more frequent ($M= 2.95$) tobacco advertising in social media than adults ($M= 3.28$) ($t(2464)= -10.17$, $p< 0.001$).

Moreover, across all countries smokers recalled tobacco advertising more frequently ($M=3.07$) than non-smokers ($M=3.26$) ($t(3728)= 6.38$, $p< 0.001$).

Reported recall of tobacco advertising in websites that stream online video clips (YouTube, etc.)

As shown in table 5.3.2.2, people surveyed recalled tobacco advertising in websites that stream online video clips on average very rarely ($M=3.27$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 4,959 people surveyed who reported using the media was $M=3.19$, indicating that, on average, those who used this media also very rarely recalled tobacco advertising.

The frequency of recall of tobacco advertising in this media differed by country ($F(10, 5515)= 15.46$, $p< 0.001$). The mean frequency of reported recall was $M=3.03$ in Spain and $M=3.04$ in Greece, therefore advertising was very rarely recalled on average in these countries. However, the mean frequencies in the Netherlands and Denmark were $M=3.55$ and $M=3.53$ respectively, indicating that tobacco advertising was recalled between very rarely and never in these countries. This can be partly explained by the use and recall correlation, and the fact that this media was reported to be used between 2-3 times a week and weekly in Spain ($M=2.65$) and almost 2-3 times a week in Greece ($M=2.20$) on average, while in the Netherlands and Denmark it was reportedly used between weekly and fortnightly ($M=3.61$ and $M=3.36$ respectively) (cf. Table 5.3.2.1).

In addition, overall, young adults recalled more frequent ($M=3.10$) tobacco advertising in websites that stream online video clips than adults ($M=3.33$) ($t(2405)= -7.31$, $p< 0.001$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the media 2-3 times a week ($M=2.21$) while adults reported using it significantly less ($M=3.24$, i.e. weekly) on average ($t(3125)= -18.39$, $p< 0.001$, cf. Table 5.3.2.1).

Moreover, across all countries smokers recalled tobacco advertising more frequently ($M=3.15$) than non-smokers ($M=3.34$) ($t(3726)= 6.40$, $p< 0.001$).

Reported recall of tobacco advertising in online games

As shown in table 5.3.2.2, people surveyed recalled tobacco advertising in online games on average between very rarely and never ($M=3.49$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 3,985 people surveyed who reported using the media was $M=3.29$, indicating that, on average, those who used this media very rarely recalled tobacco advertising.

The frequency of recall of tobacco advertising in this media differed by country ($F(10, 5515)= 12.24$, $p< 0.001$). The mean frequency of reported recall was $M=3.25$ in Spain. However, the mean frequencies in the Netherlands, Lithuania and Denmark were $M=3.69$, $M=3.68$ and $M=3.67$ respectively, indicating that it was seen close to never in these countries. Given the fairly strong use and recall correlation observed for this media (0.666), these results may be partially explained by the frequency of use of the media in these countries (cf. Table 5.3.2.1).

In addition, overall, young adults recalled more frequent ($M=3.36$) tobacco advertising in online games than adults ($M= 3.54$) ($t(2380)= -5.93$, $p< 0.001$).

Moreover, across all countries smokers recalled tobacco advertising more frequently ($M=3.37$) than non-smokers ($M=3.55$) ($t(3488)= 6.83$, $p< 0.001$).

Reported recall of tobacco advertising in appstore or apps downloaded from appstores for mobile devices (e.g. smartphones)

As shown in table 5.3.2.2, people surveyed recalled tobacco advertising in appstore or apps downloaded from appstores for mobile devices on average between very rarely and never ($M=3.52$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 4,009 people surveyed who reported using the media was $M=3.34$, indicating that, on average, those who used this media very rarely recalled tobacco advertising.

The frequency of recall of tobacco advertising in this media differed by country ($F(10, 5515)= 16.97$, $p< 0.001$). The mean frequency of reported recall was $M=3.26$ in Spain. However, the mean frequencies in Lithuania and the Netherlands were $M=3.77$ and $M=3.72$ respectively, indicating that tobacco advertising was almost never recalled in these countries. This can be partly explained by the use and recall correlation for this media, and the fact that this media was reported to be used more than fortnightly in Spain ($M=3.82$) on average, while in Lithuania it was reportedly used between monthly and less than monthly ($M=5.34$). Meanwhile, it was reportedly used between fortnightly and monthly in the Netherlands ($M=4.40$) (cf. Table 5.3.2.1).

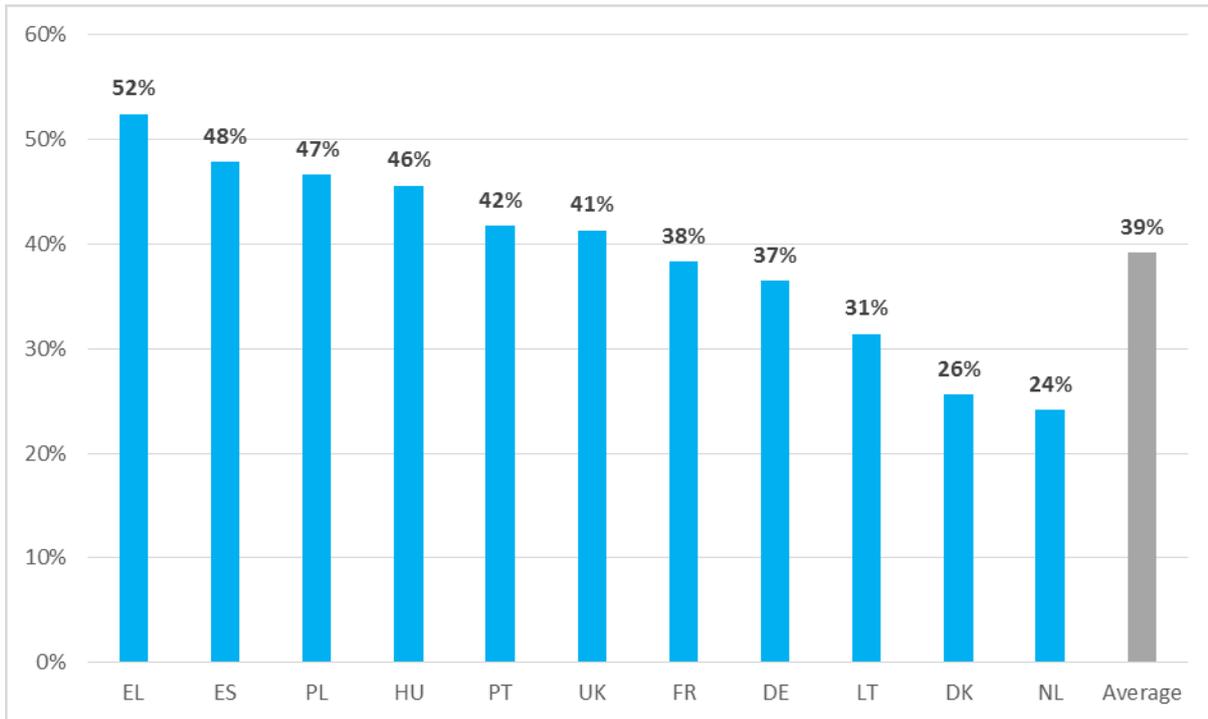
In addition, overall, young adults recalled more frequent ($M=3.41$) tobacco advertising in appstore or apps downloaded from appstores for mobile devices than adults ($M=3.56$) ($t(2394)= -5.49$, $p< 0.001$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the media between weekly and fortnightly ($M=3.64$) while adults reported using it significantly less ($M=4.80$, i.e. monthly) on average ($t(2651)= -18.20$, $p< 0.001$, cf. Table 5.3.2.1).

Moreover, across all countries smokers recalled tobacco advertising more frequently ($M=3.40$) than non-smokers ($M=3.59$) ($t(3459)= 7.42$, $p< 0.001$).

5.3.2.3 REPORTED RECALL OF TOBACCO ADVERTISING IN AT LEAST ONE TYPE OF INTERNET AND MOBILE APPLICATION MEDIA

Although recall was low on average across the sample (cf. means in table 5.3.2.2), a significant portion of respondents reported recalling tobacco advertising either “often” or “occasionally” in at least one type of internet and mobile application media.

Figure 5.3.2.3: Reported recall of any form of tobacco advertising in at least one type of internet and mobile application media (% share of respondents who said often or occasionally for at least one internet and mobile application media, per country)



The chart shows the percentage of people in each country who responded “Often” or “Occasionally” for recall in at least one type of internet and mobile application media. The types of internet and mobile application media enquired about were: e-commerce websites (Amazon, shops, etc.), online retailers of tobacco and related products, online retailers of electronic cigarettes and related products, online search engines (Google, Yahoo, etc.), social media (Facebook/Twitter, etc.), websites that stream online video clips (YouTube, etc.), online games, and appstore or apps downloaded from appstores for mobile devices (e.g. smartphones). All 5,526 individuals surveyed were taken into account in these values, not only the ones who reported using the internet and mobile application media.

As shown in figure 5.3.2.3, on average 39% of all those surveyed reported to have often or occasionally observed tobacco advertising in *at least one* of the eight types of internet and mobile application media. These percentage rates for reported recall of tobacco advertising differed by country ($\chi^2(10)= 177.8, p< 0.001$). This figure was of 52% in Greece and 48% in Spain. It is interesting to note that in Denmark and the Netherlands, at the lower end of the scale, still one out of four people surveyed still reported to recall seeing tobacco advertising in at least one type of internet and mobile application media at least occasionally.

Indeed, even though the average reported recall figures were low across all types of internet and mobile application media (cf. table 5.3.2.2) a considerable proportion of the population could recall tobacco advertising in internet and mobile application.

5.3.2.4 REPORTED RECALL OF E-CIGARETTE ADVERTISING IN INTERNET AND MOBILE APPLICATION MEDIA

The following section presents the reported recall of e-cigarette advertising in the eight types of internet and mobile application media considered. It should be noted that, for e-commerce websites, online retailers of tobacco and related products, online retailers of electronic cigarettes and related products, and websites that stream online video clips, the frequencies of use and recall of tobacco advertising are strongly correlated (correlations of 0.774, 0.989, 0.967 and 0.808 respectively). Furthermore, a moderate correlation between the frequency means of reported use and recall was also found for online search engines (0.565), social media (0.585), online games (0.693) and appstore or apps downloaded from appstores for mobile devices (0.676).

Across the eight types of internet and mobile application media considered, participants, on average, reported recalling e-cigarette advertising “very rarely” or “never” with means ranging from 3.23 for social media to 3.56 for online retailers of tobacco and related products.

Table (5.3.2.4) shows the reported recall in the eight types of internet and mobile application media by country.

Table 5.3.2.4: Reported recall of e-cigarette advertising in internet and mobile application media by Member State

	Total sample (5526)	DE (501)	DK (504)	EL (507)	ES (501)	FR (501)	HU (500)	LT (503)	NL (506)	PL (502)	PT (500)	UK (501)
E-commerce websites (Amazon, shops, etc)	3.33	3.42	3.53	3.13	3.04	3.24	3.20	3.67	3.66	3.15	3.39	3.23 ^{###}
Online retailers of tobacco and related products	3.56	3.51	3.73	3.36	3.29	3.54	3.46	3.83	3.79	3.56	3.72	3.43 ^{###}
Online retailers of electronic cigarettes and related products	3.52	3.50	3.65	3.39	3.26	3.46	3.38	3.79	3.80	3.46	3.64	3.34 ^{###}
Online search engines (Google, Yahoo, etc)	3.27	3.38	3.49	3.01	3.03	3.23	3.14	3.49	3.56	3.13	3.33	3.18 ^{###}
Social media (Facebook/Twitter, etc)	3.23	3.40	3.43	2.98	3.01	3.26	3.15	3.38	3.49	3.13	3.13	3.16 ^{###}
Websites that stream online video clips (YouTube, etc)	3.35	3.51	3.58	3.13	3.13	3.30	3.27	3.48	3.62	3.23	3.36	3.24 ^{###}
Online games	3.53	3.55	3.68	3.41	3.31	3.48	3.51	3.76	3.76	3.44	3.56	3.41 ^{###}
Appstore or apps downloaded from appstores for mobile devices (e.g. smartphones)	3.55	3.59	3.70	3.44	3.32	3.51	3.53	3.77	3.76	3.40	3.55	3.44 ^{###}

Mean score (0.00): 1= 'Often' ; 2= 'Occasionally' ; 3= 'Very rarely' ; 4= 'Never'

Base number (xxxx): number of people surveyed in the sample considered

ANOVA's for differences by country: # p<0.05; ### p<0.01; #### p<0.001. Significant results indicate that not all countries are equal.

Reported recall of e-cigarette advertising in e-commerce websites (Amazon, shops, etc.)

As shown in table 5.3.2.4, people surveyed recalled e-cigarette advertising in e-commerce websites on average very rarely ($M=3.33$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 4,604 people surveyed who reported using the media was $M=3.20$, indicating that, on average, those who used this media also very rarely recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this media differed by country ($F(10, 5515)=27.73$, $p< 0.001$). The mean frequency of reported recall was $M=3.04$ in Spain. However, the mean frequencies in Lithuania and the Netherlands were $M=3.67$ and $M=3.66$ respectively, indicating that e-cigarette advertising was recalled either very rarely or never on average in these countries. This can be partly explained by the use and recall correlation, and the fact that this media was reported to be used between weekly and fortnightly in Spain ($M=3.49$) on average, while in Lithuania it was reportedly used close to less than monthly ($M=5.68$) and between fortnightly and monthly in the Netherlands ($M=4.77$) (cf. Table 5.3.2.1).

In addition, overall, young adults (15 to 24 years old) recalled more frequent ($M= 3.20$) e-cigarette advertising in e-commerce websites than adults (over 25) ($M= 3.38$) ($t(2478)= -6.15$, $p< 0.001$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the media more than monthly ($M=3.86$) while adults reported using it significantly less ($M=4.32$, i.e. between monthly and less than monthly) on average ($t(2678)= -7.67$, $p< 0.001$, cf. Table 5.3.2.1).

Moreover, across all countries users recalled e-cigarette advertising more frequently ($M=2.71$) than non-users ($M=3.37$) ($t(355)= 10.77$, $p< 0.001$).

Reported recall of e-cigarette advertising in online retailers of tobacco and related products

As shown in table 5.3.2.4, people surveyed recalled e-cigarette advertising in online retailers of tobacco and related products on average between very rarely and never ($M=3.56$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 1,594 people surveyed who reported using the media was $M=2.49$, indicating that, on average, those who used this media on average either occasionally or very rarely recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this media differed by country ($F(10, 5515)=22.15$, $p< 0.001$). The mean frequency of reported recall was $M=3.29$ in Spain. However, the mean frequency in Lithuania was $M=3.83$ and $M=3.79$ in the Netherlands, indicating that e-cigarette advertising was almost never recalled on average in these countries. This can be partly explained by the use and recall correlation, and the fact that this media was reported to be used between monthly and less than monthly in Spain ($M=5.60$) on average, while in Lithuania and the Netherlands it was reportedly almost never used ($M=6.69$ and $M=6.56$ respectively) (cf. Table 5.3.2.1).

In addition, overall, young adults recalled more frequent ($M=3.51$) e-cigarette advertising in online retailers of e-cigarette and related products than adults ($M=3.58$) ($t(2503)= -2.62$, $p< 0.01$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the media less than monthly ($M=6.02$) while adults reported using it significantly less ($M=6.23$, i.e. between less than monthly and never) on average ($t(2678)= -3.98$, $p< 0.001$, cf. Table 5.3.2.1).

Moreover, across all countries users recalled e-cigarette advertising more frequently ($M=2.85$) than non-users ($M=3.61$) ($t(345)= 11.53$, $p< 0.001$).

Reported recall of e-cigarette advertising in online retailers of electronic cigarettes and related products

As shown in table 5.3.2.4, people surveyed recalled e-cigarette advertising in online retailers of electronic cigarettes and related products on average between very rarely and never ($M=3.52$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 1,685 people surveyed who reported using the media was $M=2.42$, indicating that, on average, those who used this media on average either occasionally or very rarely recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this media differed by country ($F(10, 5515)= 20.42$, $p< 0.001$). The mean frequency of reported recall was $M=3.26$ in Spain. However, the mean frequencies in Lithuania and the Netherlands were 3.79 and 3.80 respectively, indicating that e-cigarette advertising was almost never recalled in these countries. This can be partly explained by the use and recall correlation for this media, and the fact that it was reported to be used between monthly and less than monthly on average in Spain ($M=5.64$), while in Lithuania and the Netherlands it was reportedly used between less than monthly and never ($M=6.64$ and $M=6.56$ respectively) (cf. Table 5.3.2.1).

In addition, overall, young adults recalled more frequent ($M=3.46$) e-cigarette advertising in online retailers of electronic cigarettes and related products than adults ($M=3.54$) ($t(2469)= -2.81$, $p< 0.01$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the media less than monthly ($M=6.04$) while adults reported using it significantly less ($M=6.20$, i.e. between less than monthly and never) on average ($t(2441)= -3.18$, $p< 0.01$, cf. Table 5.3.2.1).

Moreover, across all countries users recalled e-cigarette advertising more frequently ($M=2.48$) than non-users ($M=3.58$) ($t(349)= 17.25$, $p< 0.001$).

Reported recall of e-cigarette advertising in online search engines (Google, Yahoo, etc.)

As shown in table 5.3.2.4, people surveyed recalled e-cigarette advertising in online search engines on average very rarely ($M=3.27$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 5,235 people surveyed who reported using the media was $M=3.23$, indicating that, on average, those who used this media also very rarely recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this media differed by country ($F(10, 5515)= 19.61$, $p< 0.001$). The mean frequencies of reported recall were $M=3.01$ in Greece and $M=3.03$ in Spain, therefore e-cigarette advertising was reportedly recalled very rarely on average. However, the mean frequency in the Netherlands was $M=3.56$, indicating that e-cigarette advertising was recalled either very rarely or never in this country on average. Given the fairly strong use and recall correlation observed for this media (0.565), these results may be partially explained by the frequency of use of the media in these countries (cf. Table 5.3.2.1).

In addition, overall, young adults recalled more frequent ($M=3.16$) e-cigarette advertising in online search engines than adults ($M= 3.31$) ($t(2495)= -4.89$, $p< 0.001$).

Moreover, across all countries users recalled e-cigarette advertising more frequently ($M=2.63$) than non-users ($M=3.31$) ($t(356)= 10.76$, $p < 0.001$).

Reported recall of e-cigarette advertising in social media (Facebook/Twitter, etc.)

As shown in table 5.3.2.4, people surveyed recalled e-cigarette advertising in social media on average very rarely ($M=3.23$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 4,862 people surveyed who reported using the media was $M=3.12$, indicating that, on average, those who used this media also very rarely recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this media differed by country ($F(10, 5515)= 15.73$, $p < 0.001$). The mean frequencies of reported recall were $M=2.98$ in Greece and $M=3.01$ in Spain, therefore e-cigarette advertising in this media was very rarely recalled on average in this country. However, the mean frequency in the Netherlands was $M=3.49$, indicating that e-cigarette advertising was recalled between very rarely and never in this country on average. Given the fairly strong use and recall correlation observed for this media (0.585), these results may be partially explained by the frequency of use of the media in these countries (cf. Table 5.3.2.1).

In addition, overall, young adults recalled more frequent ($M= 2.99$) e-cigarette advertising in social media than adults ($M= 3.32$) ($t(2425)= -10.51$, $p < 0.001$).

Moreover, across all countries users recalled e-cigarette advertising more frequently ($M=2.67$) than non-users ($M=3.26$) ($t(358)= 9.45$, $p < 0.001$).

Reported recall of e-cigarette advertising in websites that stream online video clips (YouTube, etc.)

As shown in table 5.3.2.4, people surveyed recalled e-cigarette advertising in websites that stream online video clips on average very rarely ($M=3.35$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 4,959 people surveyed who reported using the media was $M=3.27$, indicating that, on average, those who used this media also very rarely recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this media differed by country ($F(10, 5515)= 17.91$, $p < 0.001$). The mean frequency of reported recall was $M=3.13$ in both Spain and Greece, therefore e-cigarette advertising was very rarely recalled on average in these countries. However, the mean frequencies in the Netherlands and Denmark were $M=3.62$ and $M=3.58$ respectively, indicating that e-cigarette advertising was recalled between very rarely and never in these countries. This can be partly explained by the use and recall correlation, and the fact that this media was reported to be used between 2-3 times a week and weekly in Spain ($M=2.65$) and almost 2-3 times a week in Greece ($M=2.20$) on average, while in the Netherlands and Denmark it was reportedly used between weekly and fortnightly ($M=3.61$ and $M=3.36$ respectively) (cf. Table 5.3.2.1).

In addition, overall, young adults recalled more frequent ($M=3.21$) e-cigarette advertising in websites that stream online video clips than adults ($M=3.40$) ($t(2431)= -6.65$, $p < 0.001$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the media 2-3 times a week ($M=2.21$) while adults reported using it significantly less ($M=3.24$, i.e. weekly) on average ($t(3125)= -18.39$, $p < 0.001$, cf. Table 5.3.2.1).

Moreover, across all countries users recalled e-cigarette advertising more frequently ($M=2.87$) than non-users ($M=3.38$) ($t(356)= 8.44$, $p< 0.001$).

Reported recall of e-cigarette advertising in online games

As shown in table 5.3.2.4, people surveyed recalled e-cigarette advertising in online games on average between very rarely and never ($M=3.53$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 3,985 people surveyed who reported using the media was $M=3.35$, indicating that, on average, those who used this media very rarely recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this media differed by country ($F(10, 5515)= 15.24$, $p< 0.001$). The mean frequency of reported recall was $M=3.31$ in Spain. However, the mean frequencies in the Netherlands and Lithuania were both $M=3.76$, indicating that e-cigarette advertising was almost never recalled in these countries. Given the fairly strong use and recall correlation observed for this media (0.693), these results may be partially explained by the frequency of use of the media in these countries (cf. Table 5.3.2.1).

In addition, overall, young adults recalled more frequent ($M=3.41$) e-cigarette advertising in online games than adults ($M= 3.58$) ($t(2326)= -6.33$, $p< 0.001$).

Moreover, across all countries users recalled e-cigarette advertising more frequently ($M=3.05$) than non-users ($M=3.56$) ($t(349)= 8.41$, $p< 0.001$).

Reported recall of e-cigarette advertising in appstore or apps downloaded from appstores for mobile devices (e.g. smartphones)

As shown in table 5.3.2.4, people surveyed recalled e-cigarette advertising in appstore or apps downloaded from appstores for mobile devices on average either very rarely and never ($M=3.55$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 4,009 people surveyed who reported using the media was $M=3.38$, indicating that, on average, those who used this media very rarely recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this media differed by country ($F(10, 5515)= 16.46$, $p< 0.001$). The mean frequency of reported recall was $M=3.32$ in Spain. However, the mean frequencies in Lithuania, the Netherlands and Denmark were $M=3.77$, $M=3.76$ and $M=3.70$ respectively, indicating that e-cigarette advertising was almost never recalled in these countries. Given the fairly strong use and recall correlation observed for this media (0.676), these results may be partially explained by the frequency of use of the media in these countries (cf. Table 5.3.2.1).

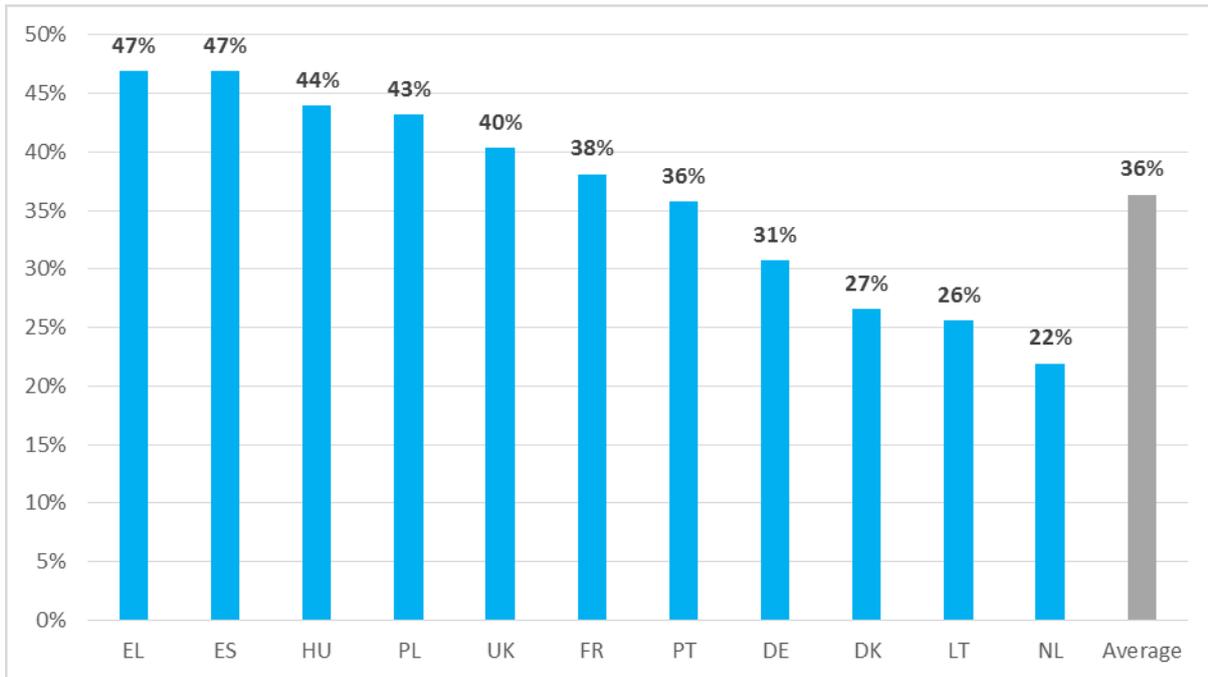
In addition, overall, young adults recalled more frequent ($M=3.44$) e-cigarette advertising in appstore or apps downloaded from appstores for mobile devices than adults ($M=3.59$) ($t(2380)= -5.33$, $p< 0.001$).

Moreover, across all countries users recalled e-cigarette advertising more frequently ($M=3.09$) than non-users ($M=3.58$) ($t(350)= 8.39$, $p< 0.001$).

5.3.2.5 REPORTED RECALL OF E-CIGARETTE ADVERTISING IN AT LEAST ONE TYPE OF INTERNET AND MOBILE APPLICATION MEDIA

The figure below (5.3.2.5) shows the percentage of respondents per country who reported recall of e-cigarette advertising, at least occasionally in at least one type of internet and mobile application media, out of all people surveyed.

Figure 5.3.2.5: Reported recall of any form of e-cigarette advertising in at least one type of internet and mobile application media (% share of respondents who said often or occasionally for at least one internet and mobile application media, per country)



The chart shows the percentage of people in each country who responded “Often” or “Occasionally” for recall in at least one type of internet and mobile application media. The types of internet and mobile application media enquired about were: e-commerce websites (Amazon, shops, etc.), online retailers of tobacco and related products, online retailers of electronic cigarettes and related products, online search engines (Google, Yahoo, etc.), social media (Facebook/Twitter, etc.), websites that stream online video clips (YouTube, etc.), online games, and appstore or apps downloaded from appstores for mobile devices (e.g. smartphones). All 5,526 individuals surveyed were taken into account in these values, not only the ones who reported using the internet and mobile application media.

Figure 5.3.2.5 represents the percentage of people surveyed who reported to have “often” or “occasionally” recalled e-cigarette advertising in at least one type of internet and mobile application media. These percentage rates for reported recall of e-cigarette advertising differed by country ($\chi^2(10)= 173.7, p< 0.001$).

Overall, the percentage of reported recall in at least one type of internet and mobile application media was slightly lower for e-cigarette than for tobacco advertising. 47% of respondents in Spain and in Greece reported recall of e-cigarette advertising in at least one type of internet and mobile application media. However, Denmark, Lithuania and the Netherlands reported recall rates of 27%, 26% and 22% respectively.

Although reported recall of e-cigarette advertising across internet and mobile application media was not frequent, at least one person out of four in all countries reported to recall seeing it either often or occasionally in at least one type of media.

5.3.3 KEY INFORMANTS' SURVEY

In order to provide some insight into the nature of the advertising and brand-related content citizens might be exposed to online, the key informants were asked to identify and describe examples of tobacco and e-cigarette advertising found online. Informants were asked to select the four most popular local language social networking sites in their country, and for each social networking site, to provide a brief overview of any **cigarette and tobacco related advertising and brand related messages** they observed, including links to any examples (see Q.32 in key informants' survey in Annex for more detail). Additional searches were conducted by the Stirling academic team to complement this work.

The following websites were examined:

Facebook (in 9 countries)

Twitter (in 7 countries)

YouTube (in 5 countries)

LinkedIn (in 4 countries))

Google+ (in 3 countries)

bg-mama.com (Bulgaria)

gbg.bg (Bulgaria)

nie-jenite.bg (Bulgaria)

svejo.net (Bulgaria)

Skype FRANCE (France)

Xing.com (Germany)

Draugas.lt (Lithuania)

One.lt (Lithuania)

Goldenline.pl (Poland)

Instagram.com (Poland)

Naszaklasa.pl (Poland)

Tuenti.com (Spain)

Tobacco advertising and brand related messages

Key informants reported limited genuine tobacco advertising found on social media websites. This observation is in line with policies by large tobacco companies not to promote their products on social media.¹⁴ The few examples of genuine advertising content which were found are described below.

One Swiss tobacco brand was found to have a German language presence on Facebook, Twitter and Instagram, where it promoted both cigarettes and e-cigarettes, positioning itself as a youthful and stylish alternative brand.¹⁵ The Facebook page for the brand advertised promotions at parties and provided links to locations of vending machines which stocked their cigarettes. The Spanish language Twitter feed of a Cuban cigar brand included images of the pack and product, information on price promotions and sponsored events.¹⁶ A Spanish language Twitter feed for a shisha producer and retailer was also observed.¹⁷ Also in Spain, advertising for smoking accessories was observed (for example, the Facebook page of a large rolling paper producer).¹⁸

Online advertising or brand-related content was also found on retailer Facebook pages in the Netherlands, Poland and Spain.¹⁹ This included images of tobacco packages and advertising for new and established brand or variants, sometimes with a humorous slant.

In addition, 'corporate' content was observed in Poland, which did not promote brands or products, but did publicise activities related to tobacco companies, such as job adverts or information for employees.²⁰ A Polish-language video clip summarising corporate social responsibility initiatives by one of the big-four tobacco company was also observed.²¹ In the Netherlands, some online news clips on new developments in the tobacco retailing sector were found which featured several close-ups of cigarette packages, in one of which it was stated that the cigarettes featured were relatively cheap for consumers.²²

Several old TV- and radio-commercials for tobacco products were found to be available (from before the advertising ban) on the video-sharing website YouTube.²³ Recent commercials appeared relatively uncommon, and originated from countries outside the EU.²⁴

User-generated content which appeared to promote particular brands was more commonly found. Key informants reported several pages on the online social networking service Facebook promoting

¹⁴ BAT Sustainability Report 2010.

http://www.bat.com/groupfs/sites/BAT_89HK76.nsf/vwPagesWebLive/DO8C6MQ8?opendocument

¹⁵ <http://www.horizont.net/marketing/nachrichten/Fast-nackt-Zigarettenmarke-Fred-macht-viel-Qualm-117390>; <https://www.facebook.com/pages/Fred-Zigaretten/227822217348336>; <https://twitter.com/smokefred>

¹⁶ <https://twitter.com/PurosCuba>

¹⁷ <https://twitter.com/HookahAlcala>

¹⁸ <https://www.facebook.com/rizla.es>

¹⁹ <https://nl-nl.facebook.com/SigarenmagazijnHendriks>; <https://www.facebook.com/MarwinPolska/info>; <https://twitter.com/todoestanco>; <https://www.facebook.com/estancodehoy?fref=ts>

²⁰ <https://www.facebook.com/PhilipMorrisPolskaSa?fref=ts>; <http://www.goldenline.pl/firma/british-american-tobacco/>

²¹ <https://www.youtube.com/watch?v=hm6CT3bulXE>

²² <https://www.youtube.com/watch?v=AriJdnuMhmE>; <https://www.youtube.com/watch?v=HYySI86rZyM>

²³ <https://www.youtube.com/watch?v=mWODcWX4d1E>

²⁴ US based sweepstakes: <https://www.youtube.com/watch?v=E6DvfWp8w6k>

specific brands and brand variants which appeared to have been developed by individual users. The sites generally contained some pictures of the product and/or its package, and activity on the sites (the number of comments and 'likes') was usually fairly limited. In Denmark, Italy, the Netherlands and the UK, several user generated sites for well-known brands were identified.²⁵ Fake Twitter accounts for tobacco brands were also observed.²⁶

A large number of obviously user-generated videos were also observed on YouTube, which discussed or 'reviewed' tobacco products and often showed packaging in close-up.

Finally, several online forums were found on social media devoted to specialist discussion of particular tobacco products. While these did not contain paid advertising as such, they could contain content which promoted particular products or events associated with tobacco companies and retailers.²⁷

E-cigarette advertising and brand related messages

There was more advertising and brand-related content found on social media for e-cigarettes than for tobacco products, which is to be expected given that this type of advertising is legal in most countries.

Several e-cigarette producers and retailers were found to have a presence on Facebook and Twitter.²⁸ Content typically included announcements about new products, prices and discounts, promotions, competitions and prize draws, news and events, and links to blogs, pro-vaping articles and video advertisements. On pages belonging to smaller brands, traffic tended to be slow and limited, with relatively few user posts, although pages belonging to some brands attracted 'likes' in the tens of thousands.²⁹

A range of different types of imagery and advertising appeals was observed, including glamorous images of models vaping³⁰, images of the range of flavours available³¹, messages about e-cigarettes helping with smoking cessation³², and price promotions which users were sometimes encouraged to re-tweet³³. Some Facebook pages focused on the debate around e-cigarette regulation and encouraged advocacy on various relevant issues.³⁴ One Facebook page belonging to a retailer in Poland claimed that traditional cigarettes were '1500 times more harmful' than e-cigarettes.³⁵

²⁵ <https://www.facebook.com/pages/Marlboro-beyond/1470673909849862?fref=ts>; <https://www.facebook.com/pages/Camel-Activate/125172530903662?fref=ts>; https://www.facebook.com/pages/Lambert-and-Butler/81613029900?sk=timeline&ref=page_internal; <https://da-dk.facebook.com/pages/Prince-Cigaretter/42526604789>

²⁶ <https://twitter.com/MarlboroBrasil?lang=en>

²⁷ <https://www.xing.com>; <https://www.xing.com/communities/groups/bossner-zigarren-1017884>

²⁸ <https://es-es.facebook.com/felizvapeo>; <https://fr-fr.facebook.com/JWellCigarettesElectroniques>; <https://da-dk.facebook.com/PlusDamp>; <https://www.facebook.com/flavorvape>; <https://www.facebook.com/dedamphoek>; <https://twitter.com/novusfumus/status/556024316740247552>; <https://twitter.com/PuffNL/status/553892813545676800>

²⁹ https://twitter.com/mr_wicked

³⁰ <https://es-es.facebook.com/felizvapeo>; <https://twitter.com/EdSylver>

³¹ <https://www.facebook.com/flavorvape>; <https://www.facebook.com/dedamphoek>;

³² <https://da-dk.facebook.com/PlusDamp>

³³ <https://twitter.com/PrimeraBolsward/status/553929134251200512>; <https://twitter.com/wiestaateronder/status/526574793039298561>

³⁴ <https://www.facebook.com/PlanetOfTheVapes>

³⁵ <https://www.facebook.com/mild.epapieros?fref=ts>

Television commercials for e-cigarette brands were found on YouTube.³⁶ YouTube was also found to feature a number of 'information videos', which provided information, instruction and reviews of e-cigarette products or links to an online retailing outlet.³⁷ These could be uploaded by retailers or users, and tended to look less professional than TV commercials.

The 'real time messaging' site Tuenti.com was found to have several examples of e-cigarette advertising in Spanish, although these were only visible to those registered with the site.³⁸

Several e-cigarette companies and retailers were reported to have profiles on the professional networking site LinkedIn.³⁹ These profile pages sometimes included advertising in pictures and/or in texts.⁴⁰ Individual e-cigarette producers and retailers were also found to have a presence on professional networking site Xing.com, although full content was only visible to those who registered on the site. Xing also included vaping user-groups,⁴¹ as did Facebook.⁴²

One of the few examples found in Bulgaria was an online shopping site which listed a number of e-cigarette retailers.⁴³

³⁶ <https://www.youtube.com/watch?v=FMcsYnmH5R4>; https://www.youtube.com/watch?v=D_e4Uvel2TE

³⁷ <https://www.youtube.com/watch?v=SvFZ7Sq1SGY>; <https://www.youtube.com/watch?v=PvAwR31ELhY>; <https://www.youtube.com/watch?v=kKMKJ-qLrgA>; <https://www.youtube.com/watch?v=UtZICyMAkQ4>; <https://www.youtube.com/watch?v=SXcPcXxxZSE>

³⁸ <http://www.tuenti.com/#m=Page&func=index&id=2350021892>; <http://www.tuenti.com/#m=Page&func=index&id=3621671924>

³⁹ <https://www.linkedin.com/pub/alexander-finke/8a/974/b15>

⁴⁰ <https://www.linkedin.com/company/isnoke>

⁴¹ <https://www.xing.com/communities/groups/e-zigarette-1035820>

⁴² <https://www.facebook.com/e.cigarette.forum>

⁴³ <http://find.gbg.bg/?q=%D0%B5%D0%BB%D0%B5%D0%BA%D1%82%D1%80%D0%BE%D0%BD%D0%BD%D0%B8+%D1%86%D0%B8%D0%B3%D0%B0%D1%80%D0%B8&c=gbg>

5.3.4 SUMMARY AND SYNTHESIS

Advertising activity

The Kantar data showed that internet advertising for e-cigarettes had been purchased in Denmark, France, Lithuania, Poland, Spain and the UK (as stated in the methodology section, Hungary and the Netherlands were not included in the Kantar data). There was no tobacco-related advertising spend on the internet recorded in the Kantar data. Kantar did not monitor internet advertising in Bulgaria and Greece, therefore we cannot conclude from the data whether any internet advertising activity occurred for either product category in those two countries.

All of the internet advertising had been placed on websites which could potentially be accessed by the general public. All or most of the internet advertising for e-cigarettes in Denmark, France, Lithuania and the UK was placed on websites with *'mostly adult'* or *'mixed'* (likely to appeal to and be seen by both young people and adults) user profiles. In Poland, however, most of the e-cigarette advertising was placed on websites categorised as having *'mostly youth'* user profiles. Websites which were categorised in this way included video game sites, cartoon/comic sites, and music sites.

When advertising share was examined (the proportion of total internet advertising spend which was related to tobacco and e-cigarettes, for those countries where information was available, that is, not Bulgaria or Greece), the *highest relative exposure of the general public to internet advertising for e-cigarettes was in Poland*, with just over 2,000 euros per million euros of advertising spend, followed by Lithuania with over 500 euros per million euros of advertising spend. Denmark, France and the UK had much smaller amounts.

Citizens' awareness and recall

Citizens reported using online and internet applications on average close to monthly, across eight different types of applications. Online search engines and social media were reported to be used more frequently. Young people reported using internet and mobile applications significantly more frequently than adults.

There was low claimed recall of tobacco and e-cigarette advertising in internet and mobile media overall, with respondents reporting that on average they recalled seeing advertising for both product categories between very rarely and never. For both tobacco and e-cigarette advertising, young adults (15-24) recalled more frequent advertising than adults (25+). This was also observed when the data was separated according to smoking behaviour and e-cigarette use, with smokers/e-cigarette users recalling more frequent advertising than non-smokers/non-users. This may reflect successful targeting to smokers and e-cigarette users along with heightened interest among those already involved with the product.

When asked if they recalled seeing advertising at least occasionally in at least one type of internet and mobile application media, 39% claimed to recall seeing tobacco advertising and 36% recalled e-cigarette advertising. At the highest end of the scale 52% of respondents in Greece recalled tobacco advertising at least occasionally in at least one type of media while 24% recalled this in the Netherlands at the lowest end of the scale. In addition, 47% in Greece and Spain recalled e-cigarette advertising at least occasionally in at least one type of media, while 22% recalled this type of advertising in the Netherlands.

Key Informants' survey

Key informants were asked to identify and describe examples of tobacco and e-cigarette advertising found online in their country.

There was a very limited amount of genuine tobacco advertising found on the websites. Several pages *appearing* to promote specific tobacco brands and products were observed on Facebook but these seemed mostly to have been developed by individual Facebook users rather than by producers or retailers.

A few examples of genuine tobacco content (i.e. originating from producers or retailers) were found. A Swiss brand had a presence (in the German language) on Facebook, Twitter and Instagram, and a 2013 prize sweepstake ad was found on YouTube. Some tobacco retailers were found to have posted content which could be said to comprise advertising (for example, images of new packs) on Facebook and Twitter. YouTube included some reports of tobacco industry CSR initiatives and some news items which featured interviews with tobacco retailers in which images of pack displays were shown. In addition, there was some 'corporate' content found online, typically on professional networking sites such as LinkedIn, which did not promote brands or products, but did publicise professional activities related to tobacco companies.

There was more advertising and brand-related content found on social media for e-cigarettes than for tobacco products. Several e-cigarette producers and retailers were found to have a presence on Facebook and Twitter. On pages belonging to smaller brands, traffic tended to be slow and limited, with relatively few user posts, although pages belonging to some brands attracted 'likes' and 'followers' in the tens of thousands. Content typically included announcements about and pictures of new products, prices and discounts, promotions, competitions and prize draws, news and events, links to other related online content, and videos. The imagery and overall tone of the Facebook and Twitter content varied, reflecting the different ways in which e-cigarettes are positioned and advertised.

Several TV commercials for e-cigarette brands were found on YouTube, along with user-generated videos in which users reviewed different e-cigarette products. Several e-cigarette companies and retailers were found to have profiles on professional networking site sites such as LinkedIn and Xing.com, although some content was only visible to those registered with the sites.

Synthesis

Tobacco advertising exposure

No tobacco-related advertising spend on the internet was recorded in the Kantar data for any of the countries monitored. However, Kantar did not monitor internet advertising in Bulgaria and Greece, therefore we cannot conclude from the data whether any internet advertising, for either tobacco or e-cigarettes, occurred for either product category in those two countries. While there was no evidence of paid advertising for tobacco on the internet in the Kantar data, the key informants' survey did find a few examples of content originating from producers or retailers which appeared to promote tobacco, such as prize draws, news items about tobacco retailing, and 'corporate' content, although these were limited. The key informants also found examples of user-generated content appearing to promote specific tobacco brands and products on Facebook, which could potentially be mistaken for tobacco advertising.

In the citizens' survey, citizens claimed to recall seeing tobacco advertising rarely or never in internet and mobile media in general, which is consistent with the Kantar data and with the low levels of activity implied by the key informants' data. However, when asked if they recalled seeing tobacco advertising in at least one type of internet or mobile application, 39% claimed to recall seeing it at least occasionally in at least one type of application. At the highest end of the scale, 52% of respondents in Greece recalled tobacco advertising at least occasionally in at least one type of internet or mobile application, compared with 24% in Netherlands at the lowest end of the scale. Because internet advertising spend was not monitored in Greece, we cannot conclude whether the higher level of recall in Greece reflected actual presence of advertising. Claimed recall of tobacco advertising online may partly reflect recall of an image or message which has been mistaken for advertising, particularly content posted by other users.

The citizens' survey data suggest that young people tended to have higher claimed recall of tobacco advertising in internet and mobile media, and also higher usage of these types of media, compared with adults. This suggests that young people may be more receptive than adults to tobacco-related content on the internet, whether genuine advertising or not.

E-cigarette advertising exposure

Internet advertising for e-cigarettes (as indicated by advertising spend data) was found in Denmark, France, Lithuania, Poland, Spain and the UK. As noted above, Kantar did not monitor internet advertising in Bulgaria and Greece, therefore we cannot conclude from the data whether any internet advertising for e-cigarettes occurred in those two countries. When internet advertising share was examined (the proportion of all internet advertising in each country which was related to e-cigarettes), the highest relative exposure of the general public to internet advertising was in Poland, with just over 2,000 euros per million euros of advertising spend, followed by Lithuania with over 500 euros per million spent. The other countries had much smaller amounts of advertising share. The key informants' survey found other e-cigarette content online which might be interpreted as advertising by citizens, such as Facebook and Twitter content posted by e-cigarette producers and retailers, TV commercials on YouTube, and e-cigarette producer and retailer profiles on professional networking sites.

In the citizens' survey, citizens claimed to recall seeing e-cigarette advertising rarely or never in internet and mobile media in general. However, when asked if they recalled seeing e-cigarette advertising in at least one type of internet or mobile application, 36% claimed to recall seeing it at least occasionally in at least one type of application. At the highest end of the scale, 47% of respondents in Greece (where internet advertising spend was not monitored by Kantar) and Spain recalled e-cigarette advertising at least occasionally in at least one type of internet or mobile application, compared with 22% in Netherlands at the lowest end of the scale. This claimed recall may reflect some awareness of the social media website content described in the previous paragraph. More systematic investigation of advertising activity and citizen recall in a few years' time, when the e-cigarette advertising environment is more stable, would be helpful.

The citizens' survey data suggest that young people tended to have higher claimed recall of e-cigarette advertising in internet and mobile media, and also higher usage of these types of media, compared with adults. This suggests that young people may be more receptive than adults to e-cigarette-related advertising content on the internet.

5.4 WORK PACKAGE 4: BILLBOARDS, POSTERS, AND OTHER TYPES OF ADVERTISING OUTSIDE THE HOME

The aim of this work package was to examine exposure to marketing for tobacco and related products within the local environment: for example, outdoor billboards, posters, billboards in stadia and events, advertisements on forms of transport, and advertising in cinemas.

Two methods were used to provide information on exposure to tobacco and e-cigarette marketing content online:

- Analysis of advertising spend data
- Citizens' Survey

As outlined in the Methods section, Kantar stated that it did not monitor tobacco or e-cigarette advertising in any channel in Hungary or the Netherlands because no advertising was permitted. Hungary and the Netherlands are therefore not included in the advertising spend tables in this section.⁴⁴

5.4.1 ANALYSIS OF ADVERTISING SPEND DATA

Amount of advertising spend

Data on advertising spend in outdoor media were provided by Kantar for **tobacco** (Bulgaria, Germany) and for **e-cigarettes** (Denmark, France, Poland, Spain, UK). Kantar did not monitor outdoor advertising for Greece, and therefore we cannot conclude from the data whether any advertising occurred in Greece in the period. Table 5.4.1.1 provides the overall totals for advertising spend categorised as relating to tobacco and e-cigarettes.

Table 5.4.1.1: Total spend, mid 2013-mid 2014, outdoor advertising, tobacco and e-cigarettes, euros

Country	Tobacco	E-cigarettes
Bulgaria	889,980	None
Denmark	None	25,126
France	None	931,470
Germany	6,592,281	None
Greece	Not monitored	Not monitored
Lithuania	None	None
Poland	None	618,311
Spain	None	11,646
UK	None	6,102,757

Data/figures/information provided by Kantar Media - All rights reserved

⁴⁴ Other information sources indicate that e-cigarette advertising was allowed in the Netherlands in 2013.

Outdoor advertising for tobacco was found only in Bulgaria and Germany, where over 6.5m euros were spent on such advertising over the period. E-cigarette outdoor advertising was found in five countries, with the UK having by far the biggest spend (over 6m euros).

In addition, the Kantar data indicated that 306,153 euros were spent on **cinema** advertising for e-cigarettes in the UK over the same period. Spend data for cinema advertising were not available for any other country.

All outdoor advertising was defined as being aimed at the general public (i.e. none of it was defined as being aimed at retail/trade only).

Potential exposure of young people to outdoor advertising

It was considered not possible or meaningful to assess the extent of potential '*adult*', '*youth*' or '*mixed*' exposure to outdoor advertising. Although outdoor advertising may be placed in sites to reach different types of viewer (e.g. near a school, in a city centre, by a motorway), it would not have been possible to make this assessment within the data. We therefore categorised all outdoor advertising as able to be seen by a mixed audience; in other words, young people would be potentially exposed to all of it.

Tobacco and e-cigarette outdoor advertising share: a comparative assessment of countries⁴⁵

As we note in the previous work packages, it is difficult to make a meaningful comparison between countries from the advertising spend data alone, and to make an assessment as to whether tobacco and e-cigarette advertising in one country is relatively more prominent than in another. In order to make this sort of assessment, we need to look at advertising share: of all the advertising in a country, for all products, how much of it is for tobacco and e-cigarettes? Calculating this gives us a figure which can be meaningfully compared between countries with very different population sizes and media markets.

Data on all advertising spend in 2013 were available from WARC, the World Advertising Research Centre. The data for outdoor advertising are presented below in Table 5.4.1.2 France, the UK and Germany spent more overall on outdoor advertising. There was no data available for Greece.

⁴⁵ Tobacco and e-cigarette print advertising share was calculated for all eleven countries, including Hungary and the Netherlands.

Table 5.4.1.2: Total outdoor advertising spend, 2013, by country

Country	Total spend in EUR (millions): Outdoor
Bulgaria	8.5
Denmark	54.8
France	1284.5
Germany	980.3
Greece	Data not available
Hungary	66.9
Lithuania	7.4
Netherlands	161.7
Poland	119.6
Spain	282.0
UK	1165.7

Date Created: 17 March 2015 12:15

© Warc (www.warc.com), 2015. Please refer to notes on a spend data for further detail and source information.

<http://www.warc.com/NotesOnAdspendData>

We then calculated the **advertising share for tobacco and e-cigarettes**; that is, how much of the overall spend on outdoor advertising in each media channel in each country was made up of tobacco and e-cigarette advertising. *The amount of tobacco and e-cigarette advertising spend was generally very low in relation to the total spend (in most cases, less than 1% of the total spend)*. In order to make the data easier to compare, we therefore made the following calculation for each media channel in each country:

For every million euros spent on total advertising in 2013, how many euros were spent on tobacco advertising and on e-cigarette advertising?

It should be noted that while the WARC data on total advertising spend related to the full year 2013, the Kantar data related to mid-2013 to mid-2014.

The advertising share data are presented in Table 5.4.1.3.

Table 5.4.1.3: For every million euros spent on outdoor advertising in 2013, how many euros were spent (mid 2013-mid 2014) on (a) **tobacco advertising, and (b) **e-cigarette** advertising?⁴⁶**

Country	Tobacco advertising	E-cigarette advertising
Bulgaria	104,703	0
Denmark	0	459
France	0	725
Germany	6,724	0
Greece	Not monitored	Not monitored
Hungary	0	0
Lithuania	0	0
Netherlands	0	0
Poland	0	5,170
Spain	0	41
UK	0	5,235

Source: WARC and Kantar

WARC: Date Created: 17 March 2015 12:15

© Warc (www.warc.com), 2015. Please refer to notes on adspend data for further detail and source information.

<http://www.warc.com/NotesOnAdspendData>

KANTAR: Data/figures/information provided by Kantar Media - All rights reserved

We can see that the *highest relative exposure of the general public to outdoor advertising for tobacco was in Bulgaria, by a considerable margin*: for every million euros spent on outdoor advertising in total, 104,703 euros were spent on tobacco advertising. In other words, just over 10% of all outdoor advertising in Bulgaria is linked to tobacco. In Germany, the only other country in the sample with outdoor advertising for tobacco, 6,724 euros were spent on tobacco advertising for every million euros spent on all outdoor advertising.

For *e-cigarettes, the highest exposure to outdoor advertising was in the UK, closely followed by Poland*, with over 5,000 euros per million euros of outdoor advertising spend in both countries. There was lower exposure in France and Denmark, and negligible exposure in Spain.

Neither Kantar nor WARC had data on outdoor advertising spend for Greece, and therefore we could not make any calculations for Greece.

⁴⁶ The spend is shown as 0 for Hungary and the Netherlands because Kantar had no data on spend in those two countries, as outlined in section 4.3.

5.4.2 CITIZENS' SURVEY

In the survey, 5,526 individuals from eleven EU countries were asked how frequently they noticed tobacco advertising and e-cigarette advertising in six different types of outside the home media: billboards / posters outside a shop / in a shop window, billboards in stadia or at events, advertising in different forms of transport (public transport, taxi, car, rail, etc.), advertising in cinemas (i.e. before a film), temporary sales/promotions, and other types of outdoor advertising. Responses were recorded separately for tobacco advertising and e-cigarette advertising on a four point scale: 'Often', 'Occasionally', 'Very rarely' or 'Never' (ranked from 1 to 4).

The tables in the following section present the mean values for the frequency of recalling tobacco advertising and recalling e-cigarette advertising in each of the six outside the home media.

5.4.2.1 REPORTED RECALL OF TOBACCO ADVERTISING OUTSIDE THE HOME

The following section presents the reported recall of tobacco advertising in the six types of outside the home media considered.

Across the six types of outside the home media considered, participants, on average, reported recalling tobacco advertising "very rarely" with means ranging from 2.93 for billboards / posters outside a shop / in a shop window to 3.31 for advertising in cinemas.

Table (5.4.2.1) shows the reported recall in the six types of outside the home media by country.

Table 5.4.2.1: Reported recall of tobacco advertising outside the home by Member State

	Total sample (5526)	DE (501)	DK (504)	EL (507)	ES (501)	FR (501)	HU (500)	LT (503)	NL (506)	PL (502)	PT (500)	UK (501)
Billboards / posters outside a shop / in a shop window	2.93	2.59	3.34	2.21	2.78	3.10	3.20	3.17	3.25	2.67	2.83	3.04 ^{###}
Billboards in stadia or at events	3.18	2.97	3.53	2.55	2.96	3.38	3.31	3.42	3.37	3.05	3.24	3.22 ^{###}
Advertising in different forms of transport (public transport, taxi, car, rail, etc)	3.18	3.02	3.44	2.59	3.05	3.28	3.28	3.43	3.43	3.14	3.21	3.15 ^{###}
Advertising in cinemas (i.e. before a film)	3.31	3.01	3.55	2.85	3.17	3.37	3.40	3.57	3.51	3.31	3.36	3.32 ^{###}
Temporary sales/promotions	3.15	2.98	3.42	2.52	3.15	3.22	3.31	3.38	3.49	2.99	2.99	3.20 ^{###}
Other types of outdoor advertising	3.12	3.06	3.44	2.59	2.96	3.28	3.24	3.22	3.42	2.91	2.94	3.26 ^{###}

Mean score (0.00): 1= 'Often' ; 2= 'Occasionally' ; 3= 'Very rarely' ; 4= 'Never'

Base number (xxxx): number of people surveyed in the sample considered

ANOVA's for differences by country: [#] p<0.05; ^{###} p<0.01; ^{####} p<0.001. Significant results indicate that not all countries are equal.

Reported recall of tobacco advertising on billboards / posters outside a shop / in a shop window

As shown in table 5.4.2.1, people surveyed recalled tobacco advertising on billboards / posters outside a shop / in a shop window on average very rarely (M=2.93).

The frequency of recall of tobacco advertising in this media differed by country (F(10, 5515)= 58.36, $p < 0.001$). The mean frequency of reported recall was M=2.21 in Greece, i.e. on average tobacco advertising on billboards / posters outside a shop / in a shop window was occasionally recalled in this country. However, the mean frequencies in Denmark and the Netherlands were M=3.34 and M=3.25 respectively, indicating that tobacco advertising was very rarely recalled in these countries.

In addition, overall, young adults (15 to 24 years old) recalled more frequent (M= 2.78) tobacco advertising on billboards / posters outside a shop / in a shop window than adults (over 25) (M= 2.98) (t(2554)= -6.05, $p < 0.001$).

Moreover, across all countries smokers recalled tobacco advertising more frequently (M=2.80) than non-smokers (M=2.99) (t(3846)= 6.37, $p < 0.001$).

Reported recall of tobacco advertising on billboards in stadia or at events

As shown in table 5.4.2.1, people surveyed recalled tobacco advertising on billboards in stadia or at events on average very rarely (M=3.18).

The frequency of recall of tobacco advertising in this media differed by country (F(10, 5515)= 43.33, $p < 0.001$). The mean frequency of reported recall was M=2.55 in Greece, i.e. advertising was either occasionally or very rarely recalled on average. However, the mean frequency in Denmark was M=3.53, indicating that tobacco advertising was recalled either very rarely or never on average in this country.

In addition, overall, young adults recalled more frequent (M=3.08) tobacco advertising on billboards in stadia or at events than adults (M=3.22) (t(2586)= -4.37, $p < 0.001$).

Moreover, across all countries smokers recalled tobacco advertising more frequently (M=3.11) than non-smokers (M=3.22) (t(3776)= 3.96, $p < 0.001$).

Reported recall of tobacco advertising in different forms of transport (public transport, taxi, car, rail, etc.)

As shown in table 5.4.2.1, people surveyed recalled tobacco advertising in different forms of transport on average very rarely (M=3.18).

The frequency of recall of tobacco advertising in this media differed by country (F(10, 5515)= 34.19, $p < 0.001$). The mean frequency of reported recall was M=2.59 in Greece, i.e. advertising was either occasionally or very rarely recalled on average. However, the mean frequencies in Lithuania and the Netherlands were both M=3.43, and M=3.44 in Denmark, indicating that advertising was either very rarely or never recalled in these countries.

In addition, overall, young adults recalled more frequent (M=3.05) tobacco advertising in different forms of transport than adults (M=3.23) (t(2544)= -6.19, $p < 0.001$).

Moreover, across all countries smokers recalled tobacco advertising more frequently (M=3.13) than non-smokers (M=3.21) (t(3772)= 3.15, $p < 0.01$).

Reported recall of tobacco advertising in cinemas (i.e. before a film)

As shown in table 5.4.2.1, people surveyed recalled tobacco advertising in cinemas on average very rarely ($M=3.31$).

The frequency of recall of tobacco advertising in this media differed by country ($F(10, 5515)= 30.55$, $p < 0.001$). The mean frequency of reported recall was $M=2.85$ in Greece, therefore tobacco advertising in this media was recalled at a higher frequency than “very rarely” on average in this country. However, the mean frequencies in Denmark, the Netherlands and Lithuania were $M=3.55$, $M=3.51$ and $M=3.57$ respectively, indicating that advertising was seen either very rarely or never in these countries on average.

In addition, overall, young adults recalled more frequent ($M=3.27$) tobacco advertising in cinemas than adults ($M= 3.33$) ($t(2553)= -2.20$, $p < 0.05$).

Moreover, across all countries smokers recalled tobacco advertising more frequently ($M=3.25$) than non-smokers ($M=3.34$) ($t(3751)= 3.32$, $p < 0.001$).

Reported recall of tobacco advertising during temporary sales/promotions

As shown in table 5.4.2.1, people surveyed recalled tobacco advertising during temporary sales/promotions on average very rarely ($M=3.15$).

The frequency of recall of tobacco advertising in this media differed by country ($F(10, 5515)= 42.32$, $p < 0.001$). The mean frequency of reported recall was $M=2.52$ in Greece, i.e. advertising was either occasionally or very rarely recalled on average. However, the mean frequencies in the Netherlands and Denmark were $M=3.49$ and $M=3.42$ respectively, indicating that tobacco advertising was either very rarely or never recalled in these countries on average.

In addition, overall, young adults recalled more frequent ($M=3.06$) tobacco advertising during temporary sales/promotions than adults ($M=3.18$) ($t(2551)= -4.21$, $p < 0.001$).

Moreover, across all countries smokers recalled tobacco advertising more frequently ($M=3.00$) than non-smokers ($M=3.23$) ($t(3693)= 7.93$, $p < 0.001$).

Reported recall of tobacco advertising in other types of outdoor advertising

As shown in table 5.4.2.1, people surveyed recalled tobacco advertising in other types of outdoor advertising on average very rarely ($M=3.12$).

The frequency of recall of tobacco advertising in this media differed by country ($F(10, 5515)= 37.93$, $p < 0.001$). The mean frequency of reported recall was $M=2.59$ in Greece, i.e. advertising was either occasionally or very rarely recalled on average. However, the mean frequencies in the Netherlands and Denmark were $M=3.42$ and $M=3.44$ respectively, indicating that tobacco advertising was either very rarely or never recalled in these countries.

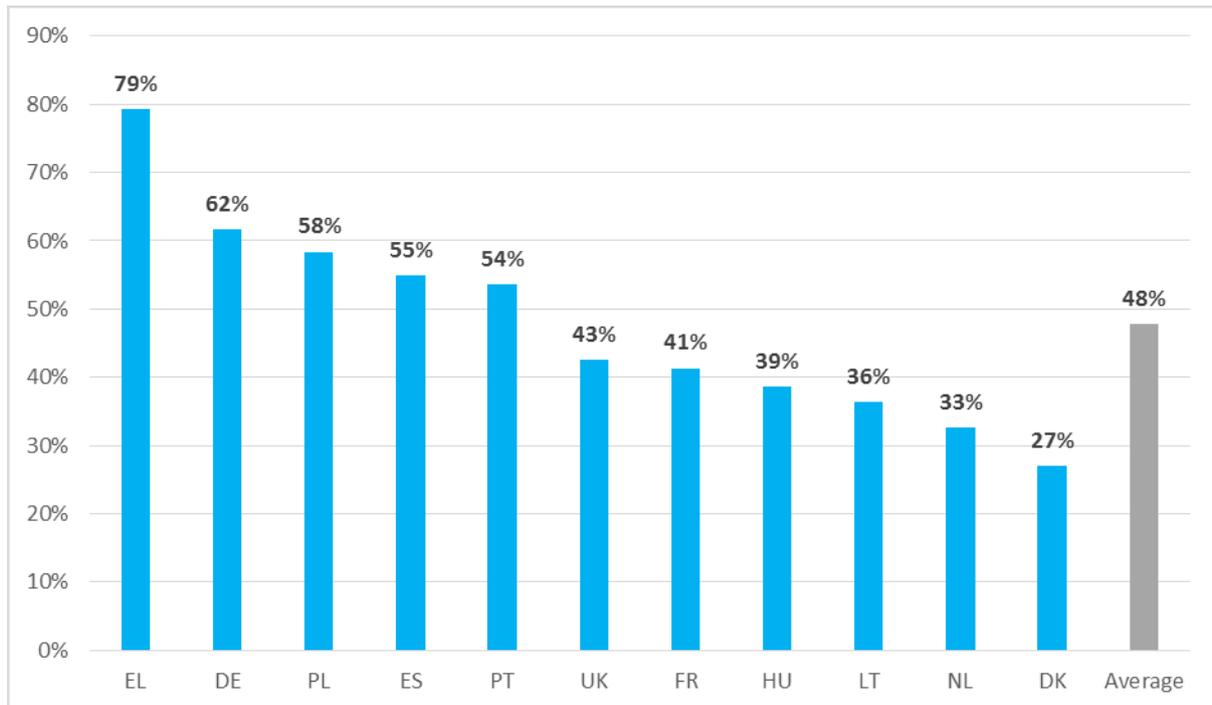
In addition, overall, young adults recalled more frequent ($M=3.01$) tobacco advertising in other types of outdoor advertising than adults ($M=3.16$) ($t(2528)= -4.92$, $p < 0.001$).

Moreover, across all countries smokers recalled tobacco advertising more frequently ($M=3.01$) than non-smokers ($M=3.18$) ($t(3768)= 5.97$, $p < 0.001$).

5.4.2.2 REPORTED RECALL OF TOBACCO ADVERTISING IN AT LEAST ONE TYPE OF OUTSIDE THE HOME MEDIA

Although recall was low on average across the sample (cf. means in table 5.4.2.1), a significant portion of respondents reported recalling tobacco advertising either “often” or “occasionally” in at least one type of outside the home media.

Figure 5.4.2.2: Reported recall of any form of tobacco advertising in *at least one* type of outside the home media (% share of respondents who said often or occasionally for at least one outside the home media, per country)



The chart shows the percentage of people in each country who responded “Often” or “Occasionally” for recall in at least one type of outside the home media. The types of outside the home media enquired about were: billboards / posters outside a shop / in a shop window, billboards in stadia or at events, advertising in different forms of transport (public transport, taxi, car, rail, etc.), advertising in cinemas (i.e. before a film), temporary sales/promotions, and other types of outdoor advertising. All 5,526 individuals surveyed were taken into account in these values.

As shown in figure 5.4.2.2, on average 48% of all those surveyed reported to have often or occasionally observed tobacco advertising in *at least one* of the six types of outside the home media. These percentage rates for reported recall of tobacco advertising differed by country ($\chi^2(10)= 471.0$, $p < 0.001$). This figure was of 79% in Greece and 62% in Germany. It is interesting to note that in Denmark and the Netherlands, at the lower end of the scale, still over one out of four people surveyed reported to recall seeing tobacco advertising in at least one type of media at least occasionally.

5.4.2.3 REPORTED RECALL OF E-CIGARETTE ADVERTISING OUTSIDE THE HOME

The following section presents the reported recall of e-cigarette advertising in the six types of outside the home media considered.

Across the six types of outside the home media considered, participants, on average, reported recalling e-cigarette advertising “very rarely” or “never” with means ranging from 3.08 for billboards / posters outside a shop / in a shop window to 3.41 for advertising in cinemas.

Table (5.4.2.3) shows the reported recall in the six types of outside the home media by country.

Table 5.4.2.3: Reported recall of e-cigarette advertising outside the home by Member State

	Total sample (5526)	DE (501)	DK (504)	EL (507)	ES (501)	FR (501)	HU (500)	LT (503)	NL (506)	PL (502)	PT (500)	UK (501)
Billboards / posters outside a shop / in a shop window	3.08	3.29	3.40	2.55	2.94	3.01	3.31	3.40	3.34	2.75	2.97	2.92 ^{###}
Billboards in stadia or at events	3.34	3.39	3.58	2.93	3.12	3.41	3.41	3.61	3.50	3.17	3.41	3.17 ^{###}
Advertising in different forms of transport (public transport, taxi, car, rail, etc)	3.31	3.42	3.51	2.98	3.17	3.29	3.37	3.57	3.47	3.15	3.34	3.09 ^{###}
Advertising in cinemas (i.e. before a film)	3.41	3.44	3.61	3.17	3.23	3.38	3.45	3.64	3.56	3.28	3.48	3.26 ^{###}
Temporary sales/promotions	3.20	3.37	3.42	2.77	3.12	3.15	3.31	3.46	3.50	2.99	3.04	3.03 ^{###}
Other types of outdoor advertising	3.25	3.46	3.51	2.96	3.04	3.22	3.31	3.42	3.48	3.00	3.13	3.20 ^{###}

Mean score (0.00): 1= 'Often' ; 2= 'Occasionally' ; 3= 'Very rarely' ; 4= 'Never'

Base number (xxxx): number of people surveyed in the sample considered

ANOVA's for differences by country: # $p < 0.05$; ### $p < 0.01$; #### $p < 0.001$. Significant results indicate that not all countries are equal.

Reported recall of e-cigarette advertising on billboards / posters outside a shop / in a shop window

As shown in table 5.4.2.3, people surveyed recalled e-cigarette advertising on billboards / posters outside a shop / in a shop window on average very rarely (M=3.08).

The frequency of recall of e-cigarette advertising in this media differed by country ($F(10, 5515)=44.31, p< 0.001$). The mean frequency of reported recall was M=2.55 in Greece, i.e. advertising was either occasionally or very rarely recalled on average. However, the mean frequencies in Denmark and Lithuania were both M=3.40, and M=3.34 in the Netherlands, indicating that e-cigarette advertising was very rarely recalled on average in these countries.

In addition, overall, young adults (15 to 24 years old) recalled more frequent (M=2.95) e-cigarette advertising on billboards / posters outside a shop / in a shop window than adults (over 25) (M= 3.13) ($t(2538)= -5.90, p< 0.001$).

Moreover, across all countries users recalled e-cigarette advertising more frequently (M=2.62) than non-users (M=3.11) ($t(358)= 7.82, p< 0.001$).

Reported recall of e-cigarette advertising on billboards in stadia or at events

As shown in table 5.4.2.3, people surveyed recalled e-cigarette advertising on billboards in stadia or at events on average very rarely (M=3.34).

The frequency of recall of e-cigarette advertising in this media differed by country ($F(10, 5515)=28.33, p< 0.001$). The mean frequency of reported recall was M=2.93 in Greece, i.e. advertising was either very rarely recalled on average. However, the mean frequency in Lithuania, Denmark and the Netherlands was M=3.61, M=3.58 and M=3.50 respectively, indicating that e-cigarette advertising was either very rarely or never recalled on average in these countries.

In addition, overall, young adults recalled more frequent (M=3.20) e-cigarette advertising on billboards in stadia or at events than adults (M=3.39) ($t(2469)= -6.52, p< 0.001$).

Moreover, across all countries users recalled e-cigarette advertising more frequently (M=2.92) than non-users (M=3.36) ($t(354)= 7.28, p< 0.001$).

Reported recall of e-cigarette advertising in different forms of transport (public transport, taxi, car, rail, etc.)

As shown in table 5.4.2.3, people surveyed recalled e-cigarette advertising in different forms of transport on average very rarely (M=3.31).

The frequency of recall of e-cigarette advertising in this media differed by country ($F(10, 5515)=22.06, p< 0.001$). The mean frequency of reported recall was M=2.98 in Greece, i.e. advertising was very rarely recalled on average. However, the mean frequencies in Lithuania and Denmark were M=3.57 and M=3.51 respectively, indicating that e-cigarette advertising was either very rarely or never recalled in these countries.

In addition, overall, young adults recalled more frequent (M=3.15) e-cigarette advertising in different forms of transport than adults (M=3.36) ($t(2450)= -7.08, p< 0.001$).

Moreover, across all countries users recalled e-cigarette advertising more frequently ($M=2.90$) than non-users ($M=3.33$) ($t(355)= 7.02$, $p < 0.001$).

Reported recall of e-cigarette advertising in cinemas (i.e. before a film)

As shown in table 5.4.2.3, people surveyed recalled e-cigarette advertising in cinemas on average between very rarely and never ($M=3.41$).

The frequency of recall of e-cigarette advertising in this media differed by country ($F(10, 5515)= 16.77$, $p < 0.001$). The mean frequency of reported recall was $M=3.17$ in Greece and $M=3.23$ in Spain, therefore e-cigarette advertising was reportedly very rarely recalled on average. Furthermore, the mean frequencies in the Lithuania and Denmark were $M=3.64$ and $M=3.61$ respectively, indicating that e-cigarette advertising was either very rarely or never recalled in this country on average.

In addition, overall, young adults recalled more frequent ($M=3.30$) e-cigarette advertising in cinemas than adults ($M=3.45$) ($t(2461)= -5.34$, $p < 0.001$).

Moreover, across all countries users recalled e-cigarette advertising more frequently ($M=3.04$) than non-users ($M=3.43$) ($t(354)= 6.65$, $p < 0.001$).

Reported recall of e-cigarette advertising during temporary sales/promotions

As shown in table 5.4.2.3, people surveyed recalled e-cigarette advertising during temporary sales/promotions on average very rarely ($M=3.20$).

The frequency of recall of e-cigarette advertising in this media differed by country ($F(10, 5515)= 30.35$, $p < 0.001$). The mean frequency of reported recall was $M=2.77$ in Greece, therefore e-cigarette advertising in this media was either occasionally or very rarely recalled on average in this country. However, the mean frequencies in the Netherlands and Lithuania were $M=3.50$ and $M=3.46$ respectively, indicating that e-cigarette advertising was either very rarely or never recalled in this country on average.

In addition, overall, young adults recalled more frequent ($M=3.06$) e-cigarette advertising during temporary sales/promotions than adults ($M=3.24$) ($t(2485)= -5.90$, $p < 0.001$).

Moreover, across all countries users recalled e-cigarette advertising more frequently ($M=2.71$) than non-users ($M=3.23$) ($t(357)= 8.47$, $p < 0.001$).

Reported recall of e-cigarette advertising in other types of outdoor advertising

As shown in table 5.4.2.3, people surveyed recalled e-cigarette advertising in other types of outdoor advertising on average very rarely ($M=3.25$).

The frequency of recall of e-cigarette advertising in this media differed by country ($F(10, 5515)= 25.49$, $p < 0.001$). The mean frequencies of reported recall in Greece, Poland and Spain were $M=2.96$, $M=3.00$ and $M=3.04$ respectively, therefore e-cigarette advertising was very rarely recalled on average in these countries. However, the mean frequencies in the Netherlands and Denmark were $M=3.48$ and $M=3.51$ respectively, indicating that e-cigarette advertising was either very rarely or never recalled in these countries.

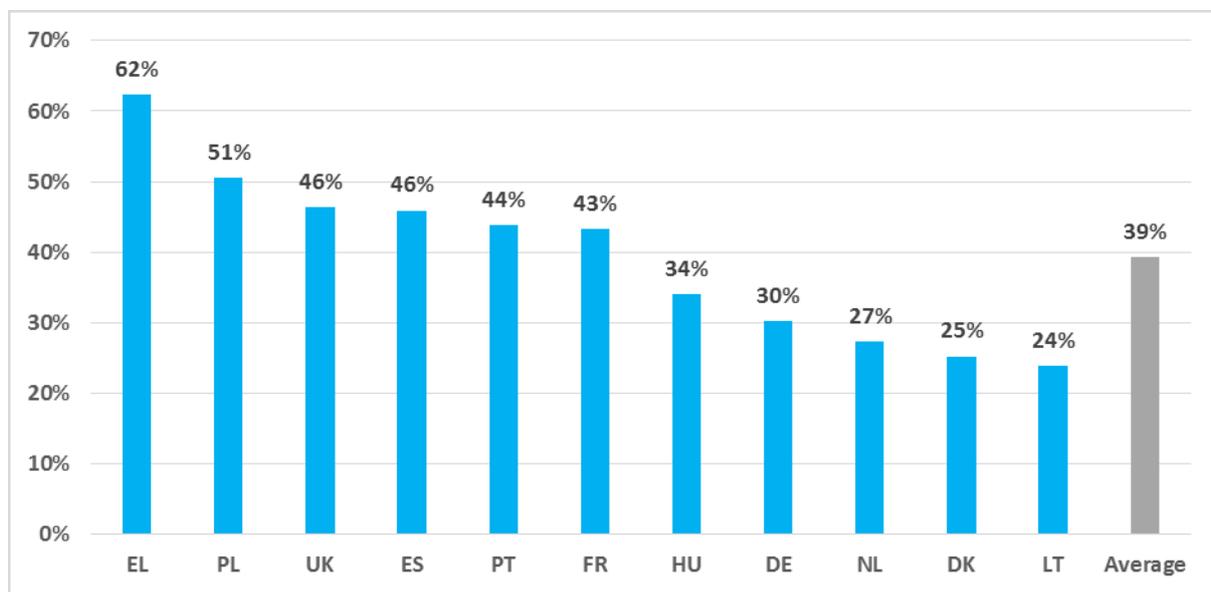
In addition, overall, young adults recalled more frequent ($M=3.13$) e-cigarette advertising in other types of outdoor advertising than adults ($M=3.29$) ($t(2492)= -5.82$, $p < 0.001$).

Moreover, across all countries users recalled e-cigarette advertising more frequently (M=2.87) than non-users (M=3.27) ($t(357) = 6.79, p < 0.001$).

5.4.2.4 REPORTED RECALL OF E-CIGARETTE ADVERTISING IN AT LEAST ONE TYPE OF OUTSIDE THE HOME MEDIA

The figure below (5.4.2.4) shows the percentage of respondents per country who reported to recall e-cigarette advertising at least occasionally in at least one type of outside the home media out of all people surveyed.

Figure 5.4.2.4: Reported recall of any form of e-cigarette advertising in at least one type of outside the home media (% share of respondents who said often or occasionally for at least one outside the home media, per country)



The chart shows the percentage of people in each country who responded “Often” or “Occasionally” for recall in at least one type of outside the home media. The types of outside the home media enquired about were: : billboards / posters outside a shop / in a shop window, billboards in stadia or at events, advertising in different forms of transport (public transport, taxi, car, rail, etc.), advertising in cinemas (i.e. before a film), temporary sales/promotions, and other types of outdoor advertising. All 5,526 individuals surveyed were taken into account in these values.

Figure 5.4.2.4 represents the percentage of people surveyed who reported to have “often” or “occasionally” recalled e-cigarette advertising in at least one type of outside the home media. These percentage rates for reported recall of e-cigarette advertising differed by country ($\chi^2(10) = 313.0, p < 0.001$).

Overall, the percentage of reported recall in at least one type of outside the home media was slightly lower for e-cigarette than for tobacco advertising. 62% of respondents in Greece and 51% in Poland reported recall of e-cigarette advertising in at least one type of media. However, in the Netherlands, Denmark and Lithuania reported recall rates were of 27%, 25% and 24% respectively.

Overall, at least one person out of four in all countries reported to recall e-cigarette advertising either often or occasionally in at least one type of media.

5.4.3 SUMMARY AND SYNTHESIS

Advertising activity

The Kantar data showed that outdoor advertising by tobacco companies had been purchased in Bulgaria and Germany, and for e-cigarettes in Denmark, France, Poland, Spain and the UK; as stated in the methodology section, Hungary and the Netherlands were not included in the Kantar data. Kantar did not monitor outdoor advertising for Greece, and therefore we cannot conclude from the data whether any advertising occurred in Greece in the period. All outdoor advertising was defined as being aimed at the general public and able to be seen by a 'mixed' audience; in other words, young people would be potentially exposed to all of it.

When advertising share was examined (the proportion of overall outdoor advertising spend which was related to tobacco and e-cigarettes), the *highest relative exposure of the general public to outdoor advertising for tobacco was in Bulgaria, by a considerable margin*: for every million euros spent on outdoor advertising in total, 104,703 euros were spent on tobacco advertising. In other words, just over 10% of all outdoor advertising in Bulgaria is linked to tobacco. In Germany, the only other country in the sample with outdoor advertising for tobacco, 6,724 euros were spent on tobacco advertising for every million euros spent on all outdoor advertising.

For e-cigarettes, the *highest exposure to outdoor advertising was in the UK, closely followed by Poland*, with over 5,000 euros per million euros of outdoor advertising spend in both countries. There was lower exposure in France and Denmark, and negligible exposure in Spain.

Neither Kantar nor WARC had data on outdoor advertising spend for Greece, and therefore we could not make any calculations for Greece.

Citizens' awareness and recall

There was low claimed recall of tobacco and e-cigarette advertising outside the home overall, with respondents reporting that on average they recalled seeing it for both product categories very rarely. For both tobacco and e-cigarette advertising, young adults (15-24) recalled more frequent advertising than adults (25+) in the six types of outside the home media considered. This was also observed when the data was separated according to smoking behaviour and e-cigarette use, with smokers/e-cigarette users recalling more frequent advertising than non-smokers/non-users in the six types of outside the home media. This may reflect successful targeting to smokers and e-cigarette users along with heightened interest among those already involved with the product.

When asked if they recalled seeing advertising at least occasionally in at least one type of media outside the home, 48% claimed to recall seeing tobacco advertising and 39% e-cigarette advertising. At the highest end of the scale, 79% in Greece and 62% in Germany recalled seeing tobacco advertising at least occasionally in at least one type of media outside the home. For e-cigarette advertising, at the highest end of the scale 62% in Greece recalled seeing it at least occasionally in at least one type of media outside the home.

Synthesis

Tobacco advertising exposure

Tobacco advertising spend in media outside the home was recorded in the Kantar data in Bulgaria and Germany. Kantar did not monitor outdoor advertising for Greece, and therefore we cannot conclude from the data whether any advertising occurred in Greece in the period. All outdoor advertising was defined as being aimed at the general public and able to be seen by a 'mixed' audience; in other words, young people would be potentially exposed to all of it. When advertising share was examined (the proportion of overall outdoor advertising spend which was related to tobacco), the *highest relative exposure of the general public to outdoor advertising for tobacco was in Bulgaria, by a considerable margin*: for every million euros spent on outdoor advertising in total, 104,703 euros were spent on tobacco advertising. In other words, just over 10% of all outdoor advertising in Bulgaria is linked to tobacco. In Germany, 6,724 euros were spent on tobacco advertising for every million euros spent on all outdoor advertising.

In the citizens' survey, citizens claimed to recall seeing tobacco advertising very rarely in media outside the home in general. However, when asked if they recalled seeing advertising at least occasionally in at least one type of media outside the home, 48% claimed to recall seeing tobacco advertising. At the highest end of the scale, 79% in Greece and 62% in Germany recalled seeing tobacco advertising at least occasionally in at least one type of media outside the home. The recall level in Germany can be seen as reflecting the existence of outdoor tobacco advertising in that country, as indicated by the advertising spend data. Bulgaria (where there was a relatively high level of outdoor tobacco advertising) was not included in the citizens' survey, and as noted above, Kantar did not monitor outdoor advertising for Greece, and therefore we cannot comment on the relationship between spend and recall for those two countries.

Young people tended to have higher claimed recall of tobacco advertising outside the home, and may be more receptive than adults to this advertising.

E-cigarette advertising exposure

Advertising outdoors (as indicated by advertising spend data) was found in Denmark, France, Poland, Spain and the UK. Kantar did not monitor outdoor advertising for Greece, and therefore we cannot conclude from the data whether any advertising occurred in Greece in the period. All outdoor advertising was defined as being aimed at the general public and able to be seen by a 'mixed' audience; in other words, young people would be potentially exposed to all of it.

When advertising share was examined (the proportion of overall outdoor advertising spend which was related to e-cigarettes), the *highest relative exposure of the general public to outdoor advertising was in the UK, closely followed by Poland, with over 5,000 euros per million euros of outdoor advertising spend in both countries*. There was lower exposure in France and Denmark, and negligible exposure in Spain.

In the citizens' survey, citizens claimed to recall seeing e-cigarette advertising very rarely in media outside the home in general. However, when asked if they recalled seeing advertising at least occasionally in at least one type of media outside the home, 39% claimed to recall seeing 39% e-cigarette advertising. At the highest end of the scale, 62% in Greece recalled seeing it at least occasionally in at least one type of media outside the home, although because outdoor advertising was not monitored by Kantar in Greece we cannot comment on any relationship between recall and

exposure in that country. Levels of claimed recall of e-cigarette advertising in at least one type of media outside the home in the UK and Poland, which had the highest advertising share for e-cigarettes, were 46% and 51% respectively. This suggests there may be some relationship between exposure and recall in those countries, although the recall level was of a similar level, 46%, in Spain, where advertising share for e-cigarettes was negligible. More systematic investigation of advertising activity and citizen recall in a few years' time, when the e-cigarette advertising environment is more stable, would be helpful.

Young people tended to have higher claimed recall of e-cigarette advertising outside the home, and may be more receptive than adults to this advertising.

5.5 WORK PACKAGE 5: TV AND RADIO (ELECTRONIC CIGARETTES) AND PRODUCT PLACEMENT (ALL PRODUCTS)

The aim of this work package was to provide an accurate and reliable overview of the amount of commercial communications for e-cigarettes on TV and radio to which EU citizens in the sample of Member States are exposed. Although it was anticipated that there would be no TV or radio advertising found for tobacco, the Kantar data indicated that radio advertising had been purchased in Greece in the relevant period, and this was therefore also examined. The work package also sought to identify information on product placement of tobacco and related products.

Two methods were used to provide information on exposure to tobacco and e-cigarette advertising on TV and radio, and on product placement:

- Analysis of advertising spend data
- Citizens' Survey

As outlined in the Methods section, Kantar stated that it did not monitor tobacco or e-cigarette advertising in any channel in Hungary or the Netherlands because no advertising was permitted. Hungary and the Netherlands are therefore not included in the advertising spend tables in this section.

5.5.1 ANALYSIS OF ADVERTISING SPEND DATA

Amount of advertising spend

Data on advertising spend on TV and radio were provided by Kantar for **tobacco** (radio only, Greece only) and for **e-cigarettes** (Bulgaria, Denmark, France, Lithuania, Poland, Spain, UK). Table provides the overall totals for advertising spend categorised as relating to tobacco and e-cigarettes.

No spend data were available for product placement.

Table 5.5.1.1: Total spend, mid 2013-mid 2014, TV & Radio advertising, tobacco and e-cigarettes, euros

Country	Tobacco	E-cigarettes
Bulgaria	None	76,540
Denmark	None	43,346
France	None	9,428,482
Germany	None	None
Greece	52,711	None
Lithuania	None	2,906
Poland	None	188,654
Spain	None	7,546,004
UK	None	6,565,355

Data/figures/information provided by Kantar Media - All rights reserved

A small amount of advertising spend was recorded for tobacco advertising, on the radio only, in Greece. There is no indication in the Kantar data of the nature of this advertising. It is possible that, as with the print advertising (see WP2), the advertising could have comprised professional recruitment, corporate social responsibility statements, statements about illicit tobacco or sponsorship of cultural events.

E-cigarette advertising on TV and radio was found in seven countries, with the highest levels (between 6.5 and 9.4m euros) in France, Spain and the UK.

Potential exposure of young people to TV and radio advertising

For five of the countries in which TV or radio advertising was found, the Kantar data did not indicate the name of the channel on which the advertising had been placed. We were unable therefore to assess whether the advertising had been on TV or radio, or what kind of audience might have been exposed to the advertising, and to make an assessment of young people's potential exposure.

For two of the countries (Greece and Poland), the Kantar data did indicate the name of the channel on which the advertising had been placed. Where this information was available, we assessed the channel against a set of criteria, and made an expert assessment as to whether the audience was 'mostly adult', 'mostly youth', or 'mixed'. We defined 'youth' as aged 16-25. The spend data were then broken down by these categories to illustrate the extent of spend on TV and radio channels aimed at mostly adult, mostly youth and mixed audiences, in countries where the information was available. We can see from Table 5.5.1.2 that the radio advertising in Greece placed by tobacco companies was on channels which were predominantly classified as 'mostly adult', with a small amount placed on channels with a 'mixed' audience, i.e. likely to have appealed to and been seen by both young people and adults. In Table 5.5.1.3, we can see that all of the e-cigarette advertising in Poland was on the radio, and was categorised as having been placed on channels aimed at a 'mixed' audience. These were largely local news and music radio channels.

Table 5.5.1.2: Radio advertising spend, mid 2013-mid 2014, TOBACCO, broken down by audience

Country	Total, general public media	Mostly adult	Mixed	Mostly youth
Greece	52,711	48,125	4,586	0

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Table 5.5.1.3: Radio advertising spend, mid 2013-mid 2014, E- CIGARETTES, broken down by audience

Country	Total, general public media	Mostly adult	Mixed	Mostly youth
Poland	188,654	0	188,654	0

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Tobacco and e-cigarette TV and radio advertising share: a comparative assessment of countries⁴⁷

As we note in the previous work packages, it is difficult to make a meaningful comparison between countries from the advertising spend data alone, and to make an assessment as to whether tobacco and e-cigarette advertising in one country is relatively more prominent than in another. In order to make this sort of assessment, we need to look at advertising share: of all the advertising in a country, for all products, how much of it is for tobacco and e-cigarettes? Calculating this gives us a figure which can be meaningfully compared between countries with very different population sizes and media markets.

Data on all advertising spend in 2013 were available from WARC, the World Advertising Research Centre. The data for TV and radio advertising are presented below in Table 5.5.1.4. The UK, Germany and France had the highest overall expenditure on TV and radio advertising, both separately and combined.

Table 5.5.1.4: Total TV and radio advertising spend, 2013, by country

Country	Total spend in EUR (millions)		
	TV	Radio	TV and radio combined
Bulgaria	351.1	5.6	356.7
Denmark	296.5	38.6	335.1
France	3589.2	820.6	4409.8
Germany	4537.6	820.7	5358.3
Greece	514.3	33.1	547.4
Hungary	233.1	47.8	280.9
Lithuania	47.1	7.8	54.9
Netherlands	834.3	240.1	1074.4
Poland	1010.1	134.2	1144.3
Spain	1703.4	403.6	2107
UK	5257.2	632.3	5889.5

Date Created: 17 March 2015 12:15

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<http://www.warc.com/NotesOnAdspendData>

We then calculated the **advertising share for tobacco and e-cigarettes**; that is, how much of the overall spend on TV and radio advertising in each media channel in each country was made up of tobacco and e-cigarette advertising. *The amount of tobacco and e-cigarette advertising spend was generally very low in relation to the total spend (in most cases, less than 1% of the total spend)*. In order to make the data easier to compare, we therefore made the following calculation for each media channel in each country:

⁴⁷ Tobacco and e-cigarette print advertising share was calculated for all eleven countries, including Hungary and the Netherlands.

For every million euros spent on total advertising in 2013, how many euros were spent on tobacco advertising and on e-cigarette advertising?

It should be noted that while the WARC data on total advertising spend related to the full year 2013, the Kantar data related to mid-2013 to mid-2014.

Table 5.5.1.5 below presents exposure to TV and radio advertising, calculated in the same way. The Kantar data indicated that the tobacco advertising spend in Greece and the e-cigarette advertising spend in Poland was only on the radio. In the remaining countries where Kantar recorded TV and radio advertising spend for e-cigarettes, the data did not indicate whether the advertising was on TV or radio. The table below therefore presents the tobacco and e-cigarette advertising spend in relation to every million spent on radio advertising alone, and in relation to every million spent on TV and radio advertising combined.

Table 5.5.1.5: For every million euros spent on TV and radio advertising in 2013, how many euros were spent (mid 2013-mid 2014) on (a) **tobacco advertising, and (b) **e-cigarette** advertising?⁴⁸**

Country	Tobacco advertising		E-cigarette advertising	
	Radio	TV and Radio	Radio	TV and Radio
Bulgaria	0	0	€13,667	€215
Denmark	0	0	€1,123	€129
France	0	0	€11,490	€2,138
Germany	0	0	0	0
Greece	€1,592	€96	0	0
Hungary	0	0	0	0
Lithuania	0	0	€373	€53
Netherlands	0	0	0	0
Poland	0	0	€1,406	€165
Spain	0	0	€18,697	€3,581
UK	0	0	€10,383	€1,115

Source: WARC and Kantar

WARC: Date Created: 17 March 2015 12:15

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<http://www.warc.com/NotesOnAdspendData>

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In the only country where tobacco advertising was reported, Greece, just over 1,500 euros were spent for every million euros spent on total radio advertising, dropping to 96 euros for every million spent on total TV and radio advertising combined.

⁴⁸ The spend is shown as 0 for Hungary and the Netherlands because Kantar had no data on spend in those two countries, as outlined in section 4.3.

For e-cigarettes, the highest exposure in relation to TV and radio advertising combined was in Spain, where over 3,500 euros were spent on e-cigarette advertising for every million euros spent on total TV and radio advertising combined, followed by France (over 2,000 euros) and the UK (over 1,000 euros). There was much lower exposure in Bulgaria, Poland, Denmark and Lithuania.

When the e-cigarette advertising spend was examined in relation to total radio advertising (i.e. without TV advertising), the highest exposure was found in Spain again, with nearly 19,000 euros spent on e-cigarette advertising for every million euros spent on total radio advertising. Bulgaria had the second highest exposure in this calculation, with over 13,500 euros spent per million euros spent on total radio advertising, followed by France and the UK (over 11,000 and over 10,000 euros respectively). Poland, Denmark and Lithuania had much lower exposure.

5.5.2 CITIZENS' SURVEY

In the survey, 5,526 individuals from eleven EU countries were asked how frequently they used six different types of TV and radio media: national or local TV channels, TV channels from another country, on-demand TV programmes (e.g. streamed online or via a special device in your home), national or local radio channels, radio channels from another country, and on-demand radio programmes (e.g. streamed online). Responses were recorded on a seven point scale: 'Daily'; '2-3 times a week'; 'Weekly'; 'Once every two weeks'; 'Monthly'; 'Less than monthly'; and 'Never' (ranked on a scale of 1 to 7). For those media which they used they were then asked how frequently they noticed tobacco product placement as well as e-cigarette advertising and product placement in each type of media. Responses were recorded separately for tobacco product placement, e-cigarette advertising and e-cigarette product placement on a four point scale: 'Often', 'Occasionally', 'Very rarely' or 'Never' (ranked from 1 to 4).

The tables in the following section present the mean values for the frequency of using each of the six TV and radio media and mean values for the frequencies of recalling tobacco product placement as well as recalling e-cigarette advertising and product placement in the same media.

5.5.2.1. REPORTED USE OF TV AND RADIO MEDIA

Table 5.5.2.1: TV and radio media use profile – Mean frequency of use

	Total sample (5526)	Age		Member State										
		Young people (15-24) (1485)	Adults (25+) (4041)	DE (501)	DK (504)	EL (507)	ES (501)	FR (501)	HU (500)	LT (503)	NL (506)	PL (502)	PT (500)	UK (501)
National or local TV channels	2.27	2.71	2.11***	2.61	2.43	1.91	2.21	2.37	2.57	2.43	2.43	2.21	1.66	2.16####
TV channels from another country	4.30	4.44	4.25**	5.26	3.75	4.63	4.68	5.33	4.12	3.51	4.02	4.36	2.74	4.88####
On-demand TV programmes (e.g. streamed online or via a special device in your home)	4.75	4.40	4.88***	5.24	4.78	4.60	4.56	4.83	4.83	4.53	5.30	4.98	4.74	3.83####
National or local radio channels	3.08	3.61	2.89***	3.11	3.57	2.43	2.94	3.22	3.56	3.30	3.54	2.57	2.51	3.15####
Radio channels from another country	5.70	5.60	5.73*	5.80	5.76	5.73	5.51	5.88	5.41	5.52	6.04	5.53	5.83	5.63####
On-demand radio programmes (e.g. streamed online)	5.44	5.21	5.53***	5.72	5.72	5.25	5.15	5.51	5.07	5.63	6.07	5.32	5.25	5.18####

Mean score (0.00): 1= 'Daily'; 2= '2-3 times a week'; 3= 'Weekly'; 4= 'Once every two weeks'; 5= 'Monthly'; 6= 'Less than monthly'; 7= 'Never'

Base number (xxxx): number of people surveyed in the sample considered

t-tests for differences by age: * p<0.05; ** p<0.01; *** p<0.001

ANOVA's for differences by country: * p<0.05; ** p<0.01; ### p<0.001. Significant results indicate that not all countries are equal.

Table 5.5.2.1 presents mean frequency of reported use of TV and radio media in the eleven countries surveyed. On average, respondents used national or local TV channels 2-3 times a week on average ($M=2.27$), while TV channels from another country were used on average fortnightly ($M=4.30$), and on-demand TV programmes were used more than once a month ($M=4.75$). In addition, national or local radio channels were reportedly used on a weekly basis on average ($M=3.08$), radio channels from another country less than monthly ($M=5.70$), and on-demand radio programmes were used, on average, between monthly and less than monthly ($M=5.44$).

Reported frequency of using each media differed by age with young adults (15-24) reporting more frequent use of radio channels from another country, on-demand TV and on-demand radio programmes than adults (25+). Indeed, young adults reported using radio channels from another country either monthly or less than monthly ($M=5.60$) while adults reported using it less than monthly on average ($M=5.73$) ($t(2606) = -2.34$, $p < 0.05$). In addition, young adults watched on-demand TV programmes on average between fortnightly and monthly ($M=4.40$) while adults reported watching them monthly ($M=4.88$) ($t(2651) = -6.90$, $p < 0.001$), and on-demand radio programmes were listened to on average monthly by young adults ($M=5.21$) compared to between monthly and less than monthly by adults ($M=5.53$) ($t(2631) = -5.03$, $p < 0.001$).

However, adults reported using national or local TV and radio channels as well as TV channels from another country, significantly more frequently than young adults. Indeed, national or local TV channels were watched by adults on average 2-3 times a week ($M=2.11$) compared to close to weekly by young adults ($M=2.71$) ($t(2508) = 9.57$, $p < 0.001$). In addition, adults reported watching TV channels from another country on average fortnightly ($M=4.25$) while young adults reported using them on average between fortnightly and monthly ($M=4.44$) ($t(2796) = 2.75$, $p < 0.01$). Furthermore, national and local radio channels were listened to on average more than once a week by adults ($M=2.89$), compared to between weekly and fortnightly by young adults ($M=3.61$) ($t(2629) = 10.46$, $p < 0.001$) (cf. Table 5.5.2.1 for all types of media).

Frequency of using each type of media differed across countries (national or local TV channels $F(10, 5515) = 10.37$, $p < 0.001$; TV channels from another country $F(10, 5515) = 62.54$, $p < 0.001$; on-demand TV programmes $F(10, 5515) = 15.13$, $p < 0.001$; national or local radio channels $F(10, 5515) = 17.91$, $p < 0.001$; radio channels from another country $F(10, 5515) = 5.11$, $p < 0.001$; on-demand radio programmes $F(10, 5515) = 11.69$, $p < 0.001$).

5.5.2.2 REPORTED RECALL OF TOBACCO PRODUCT PLACEMENT IN TV AND RADIO MEDIA

The following section presents the reported recall of tobacco product placement in the six types of TV and radio media considered. It should be noted that, for on-demand TV and radio programmes, the frequencies of use and recall of tobacco product placement were positively correlated (correlations of 0.697 and 0.734 respectively), as well as for national or local radio channels (0.664). Furthermore, a moderate correlation between the frequency means of reported use and recall was also found for national or local TV channels (0.479), and radio channels from another country (0.516). Finally, there was no correlation between use and recall for TV channels from another country (0.216).

Across the six types of TV and radio media considered, participants, on average, reported recalling tobacco product placement “very rarely” or “never” with means ranging from 3.20 for national or local TV channels to 3.62 for radio channels from another country.

Table (5.5.2.2) shows the reported recall in the six types of TV and radio media by country.

Table 5.5.2.2: Reported recall of tobacco product placement in TV and radio media by Member State

	Total sample (5526)	DE (501)	DK (504)	EL (507)	ES (501)	FR (501)	HU (500)	LT (503)	NL (506)	PL (502)	PT (500)	UK (501)
National or local TV channels	3.20	3.23	3.46	2.91	2.89	3.20	3.26	3.42	3.40	3.11	3.23	3.07 ^{###}
TV channels from another country	3.43	3.50	3.53	3.45	3.28	3.48	3.40	3.44	3.50	3.40	3.32	3.38 ^{###}
On-demand TV programmes (e.g. streamed online or via a special device in your home)	3.50	3.58	3.63	3.37	3.28	3.50	3.50	3.59	3.69	3.47	3.55	3.30 ^{###}
National or local radio channels	3.45	3.51	3.69	3.15	3.15	3.37	3.53	3.68	3.67	3.36	3.51	3.37 ^{###}
Radio channels from another country	3.62	3.63	3.73	3.57	3.42	3.60	3.59	3.74	3.77	3.56	3.69	3.50 ^{###}
On-demand radio programmes (e.g. streamed online)	3.59	3.61	3.75	3.48	3.34	3.55	3.60	3.74	3.78	3.52	3.66	3.48 ^{###}

Mean score (0.00): 1= 'Often' ; 2= 'Occasionally' ; 3= 'Very rarely' ; 4= 'Never'

Base number (xxxx): number of people surveyed in the sample considered

ANOVA's for differences by country: # p<0.05; ## p<0.01; ### p<0.001. Significant results indicate that not all countries are equal

Reported recall of tobacco product placement in national or local TV channels

As shown in table 5.5.2.2, people surveyed recalled tobacco product placement in national or local TV channels on average very rarely ($M=3.20$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 5,057 people surveyed who reported using the media was $M=3.12$, indicating that, on average, those who used this media also very rarely recalled tobacco product placement.

The frequency of recall of tobacco product placement in this media differed by country ($F(10, 5515)=17.99$, $p<0.001$). The mean frequency of reported recall was $M=2.91$ in Greece and $M=2.89$ in Spain, approximating to average recall of very rarely in these countries. However, the mean frequencies in Denmark, Lithuania and the Netherlands were $M=3.46$, $M=3.42$ and $M=3.40$ respectively, indicating that it was seen either very rarely or never in these countries. Given the moderate use and recall correlation observed for this media (0.479), these results may be partially explained by the frequency of use of the media in these countries (cf. Table 5.5.2.1).

In addition, overall, young adults (15 to 24 years old) recalled more frequent ($M=3.02$) tobacco product placement in national or local TV channels than adults (over 25) ($M=3.27$) ($t(2457)=-7.66$, $p<0.001$).

Moreover, across all countries smokers recalled tobacco product placement more frequently ($M=3.15$) than non-smokers ($M=3.23$) ($t(3835)=2.55$, $p<0.05$).

Reported recall of tobacco product placement in TV channels from another country

As shown in table 5.5.2.2, people surveyed recalled tobacco product placement in TV channels from another country on average either very rarely or never ($M=3.43$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 3,989 people surveyed who reported using the media was $M=3.21$, indicating that, on average, those who used this media very rarely recalled tobacco product placement.

The frequency of recall of tobacco product placement in this media differed by country ($F(10, 5515)=3.85$, $p<0.001$). The mean frequency of reported recall was $M=3.28$ in Spain and $M=3.32$ in Portugal, therefore it was very rarely recalled on average. However, the mean frequency was $M=3.53$ in Denmark, $M=3.50$ in both Germany and the Netherlands, and $M=3.48$ in France indicating that, on average, it was either very rarely or never recalled in these countries. Given the use and recall correlation observed for this media was low (0.216), it is unlikely that these results can be explained by the frequency of use of the media in these countries.

In addition, overall, young adults recalled more frequent ($M=3.30$) tobacco product placement in TV channels from another country than adults ($M=3.47$) ($t(2384)=-6.06$, $p<0.001$).

Moreover, across all countries smokers recalled tobacco product placement more frequently ($M=3.37$) than non-smokers ($M=3.46$) ($t(3728)=3.58$, $p<0.001$).

Reported recall of tobacco product placement in on-demand TV programmes (e.g. streamed online or via a special device in your home)

As shown in table 5.5.2.2, people surveyed recalled tobacco product placement in on-demand TV programmes on average either very rarely or never ($M=3.50$). It is important to note that the whole

sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 3,345 people surveyed who reported using the media was $M=3.17$, indicating that, on average, those who used this media on average very rarely recalled tobacco product placement.

The frequency of recall of tobacco product placement in this media differed by country ($F(10, 5515)=11.88$, $p<0.001$). The mean frequency of reported recall was $M=3.28$ in Spain and $M=3.30$ in the UK, therefore it was very rarely recalled on average. However, the mean frequencies in the Netherlands and the Denmark were $M=3.69$ and 3.63 respectively, indicating that it was either very rarely or never seen in these countries. This may be partly explained by the use and recall correlation for this media, and the fact that it was reported to be watched between fortnightly and monthly on average in Spain ($M=4.56$) and more than fortnightly in the UK ($M=3.83$), while in the Netherlands it was reportedly watched between monthly and less than monthly ($M=5.30$). However, in Denmark it was reportedly watched more than monthly ($M=4.78$), which is close to the frequency observed in Spain ($M=4.56$). This indicated that frequency of use was not the only reason for the frequency of recall observed in these countries (cf. Table 5.5.2.1).

In addition, overall, young adults recalled more frequent ($M=3.39$) tobacco product placement in on-demand TV programmes than adults ($M=3.53$) ($t(2469)=-5.17$, $p<0.001$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the media between fortnightly and monthly ($M=4.40$) while adults reported using it significantly less ($M=4.88$, i.e. between almost monthly) on average ($t(2651)=-6.90$, $p<0.001$, cf. Table 5.5.2.1).

Moreover, across all countries smokers recalled tobacco product placement more frequently ($M=3.42$) than non-smokers ($M=3.54$) ($t(3641)=4.80$, $p<0.001$).

Reported recall of tobacco product placement in national or local radio channels

As shown in table 5.5.2.2, people surveyed recalled tobacco product placement in national or local radio channels on average either very rarely or never ($M=3.45$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 4,672 people surveyed who reported using the media was $M=3.35$, indicating that, on average, those who used this media very rarely recalled tobacco product placement.

The frequency of recall of tobacco product placement in this media differed by country ($F(10, 5515)=25.14$, $p<0.001$). The mean frequency of reported recall was $M=3.15$ both in Greece and Spain, therefore tobacco product placement was reportedly very rarely recalled on average. However, the mean frequencies in Denmark, Lithuania and the Netherlands were $M=3.69$ $M=3.68$ and $M=3.67$ respectively, indicating that it was almost never recalled in these countries on average. This can be partly explained by the use and recall correlation, and the fact that this media was reported to be used weekly in Spain ($M=2.94$) and between 2-3 times a week and weekly in Greece ($M=2.43$) on average, while in the Netherlands and Denmark it was reportedly used between weekly and fortnightly ($M=3.57$ and $M=3.54$ respectively), and less than weekly in Lithuania ($M=3.30$) (cf. Table 5.5.2.1).

In addition, overall, young adults recalled more frequent ($M=3.37$) tobacco product placement in national or local radio channels than adults ($M=3.48$) ($t(2506)=-4.20$, $p<0.001$). However, despite the frequency of use and recall correlation, adults reported to use the media significantly more frequently ($M=2.89$, i.e. more than weekly) than young adults ($M=3.61$, i.e. between weekly and fortnightly) ($t(2629)=10.49$, $p<0.001$, cf. Table 5.5.2.1).

Moreover, across all countries smokers recalled tobacco product placement more frequently ($M=3.38$) than non-smokers ($M=3.49$) ($t(3633)= 4.56$, $p < 0.001$).

Reported recall of tobacco product placement in radio channels from another country

As shown in table 5.5.2.2, people surveyed recalled tobacco product placement in radio channels from another country on average either very rarely or never ($M=3.62$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 2,428 people surveyed who reported using the media was $M=3.13$, indicating that, on average, those who used this media very rarely recalled tobacco product placement.

The frequency of recall of tobacco product placement in this media differed by country ($F(10, 5515)= 9.56$, $p < 0.001$). The mean frequency of reported recall was $M=3.42$ in Spain, therefore tobacco product placement in this media was on average either very rarely or never recalled in this country. However, the mean frequencies in the Netherlands, Lithuania and Denmark were $M=3.77$, $M=3.74$ and $M=3.73$ respectively, indicating that, on average, tobacco product placement was almost never recalled in these countries. Given the fairly strong use and recall correlation observed for this media being (0.516), these results may be partially explained by the frequency of use of the media in these countries (cf. Table 5.5.2.1).

In addition, overall, young adults recalled more frequent ($M= 2.53$) tobacco product placement in radio channels from another country than adults ($M= 3.65$) ($t(2328)= -4.67$, $p < 0.001$).

Moreover, across all countries smokers recalled tobacco product placement more frequently ($M=3.55$) than non-smokers ($M=3.66$) ($t(3511)= 4.83$, $p < 0.001$).

Reported recall of tobacco product placement in on-demand radio programmes (e.g. streamed online)

As shown in table 5.5.2.2, people surveyed recalled tobacco product placement in on-demand radio programmes on average either very rarely or never ($M=3.59$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 2,649 people surveyed who reported using the media was $M=3.15$, indicating that, on average, those who used this media very rarely recalled tobacco product placement.

The frequency of recall of tobacco product placement in this media differed by country ($F(10, 5515)= 15.03$, $p < 0.001$). The mean frequency of reported recall was $M=3.34$ in Spain, therefore product placement was very rarely recalled on average in these countries. However, the mean frequencies in the Netherlands, Denmark and Lithuania were $M=3.78$, $M=3.75$ and $M=3.74$ respectively, indicating that tobacco product placement was almost never recalled in these countries. This can be partly explained by the use and recall correlation, and the fact that this media was reported to be used on average monthly in Spain ($M=5.15$), while in the Netherlands it was used less than monthly ($M=6.07$), in Denmark just over less than monthly ($M=5.72$) and in Lithuania it was reportedly used between monthly and less than monthly ($M=5.63$) (cf. Table 5.5.2.1).

In addition, overall, young adults recalled more frequent ($M=3.49$) tobacco product placement in on-demand radio programmes than adults ($M=3.63$) ($t(2373)= -5.27$, $p < 0.001$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the media

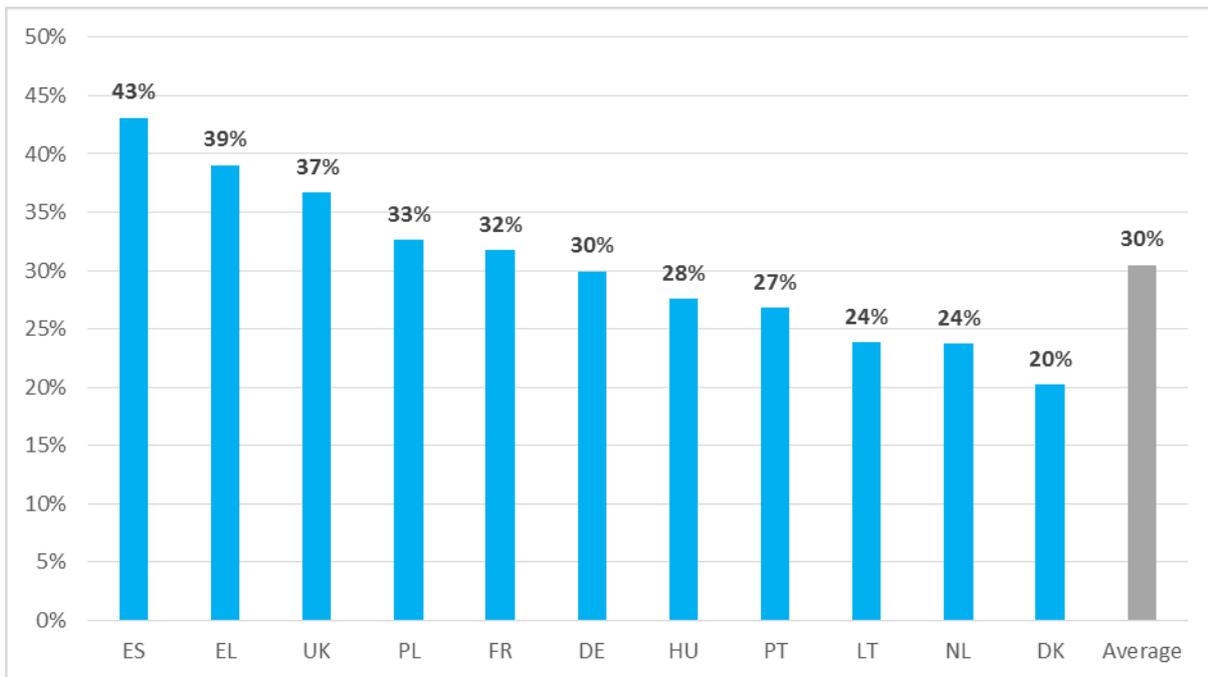
on a monthly basis (M=5.21) while adults reported using it significantly less (M=5.53, i.e. between monthly and less than monthly) on average ($t(2631) = -5.03, p < 0.001$, cf. Table 5.5.2.1).

Moreover, across all countries smokers recalled tobacco product placement more frequently (M=3.51) than non-smokers (M=3.64) ($t(3454) = 5.66, p < 0.001$).

5.5.2.3 REPORTED RECALL OF TOBACCO PRODUCT PLACEMENT IN AT LEAST ONE TYPE OF TV AND RADIO MEDIA

Although recall was low on average across the sample (cf. means in table 5.5.2.2), a significant portion of respondents reported recalling tobacco product placement either “often” or “occasionally” in at least one type of TV and radio media.

Figure 5.5.2.3: Reported recall of any form of tobacco product placement in at least one type of TV and radio media (% share of respondents who said often or occasionally for at least one TV and radio media, per country)



The chart shows the percentage of people in each country who responded “Often” or “Occasionally” for recall in at least one type of TV and radio media. The types of TV and radio media enquired about were: national or local TV channels, TV channels from another country, on-demand TV programmes (e.g. streamed online or via a special device in your home), national or local radio channels, radio channels from another country, and on-demand radio programmes (e.g. streamed online). All 5,526 individuals surveyed were taken into account in these values, not only the ones who reported using the TV and radio media.

As shown in figure 5.5.2.3, on average 30% of all those surveyed reported to have often or occasionally observed tobacco product placement in at least one of the six types of TV and radio media. These percentage rates for reported recall of tobacco product placement differed by country ($\chi^2(10) = 117.5, p < 0.001$). This figure was 43% in Spain, 39% in Greece and 47% in the UK. It is interesting to note that in Lithuania, the Netherlands and Denmark, at the lower end of the scale

(24%, 24% and 20% respectively), still one out of five people surveyed reported to recall tobacco product placement in at least one type of TV and radio media at least occasionally.

Indeed, even though the average reported recall figures were low across all types of media (cf. table 5.5.2.2) a considerable proportion of the population reported recalling tobacco product placement on TV and radio.

5.5.2.4 REPORTED RECALL OF E-CIGARETTE ADVERTISING IN TV AND RADIO MEDIA

The following section presents the reported recall of e-cigarette advertising in the six types of TV and radio media considered. It should be noted that, for on-demand radio programmes, the frequencies of use and recall of e-cigarette advertising were positively correlated (correlation of 0.751). Furthermore, a moderate correlation between the frequency means of reported use and recall was also found for national or local TV channels (0.481), on-demand TV programmes (0.626), national or local radio channels (0.605) and radio channels from another country (0.553). Finally, there was no correlation between use and recall for TV channels from another country (-0.151).

Across the six types of TV and radio media considered, participants, on average, reported recalling e-cigarette advertising “very rarely” or “never” with means ranging from 3.28 for national or local TV channels to 3.64 for radio channels from another country.

Table (5.5.2.4) shows the reported recall in the six types of TV and radio media by country.

Table 5.5.2.4: Reported recall of e-cigarette advertising in TV and radio media by Member State

	Total sample (5526)	DE (501)	DK (504)	EL (507)	ES (501)	FR (501)	HU (500)	LT (503)	NL (506)	PL (502)	PT (500)	UK (501)
National or local TV channels	3.28	3.45	3.54	3.02	2.98	3.24	3.31	3.56	3.38	3.18	3.33	3.06 ^{###}
TV channels from another country	3.50	3.62	3.60	3.49	3.35	3.52	3.44	3.59	3.60	3.43	3.48	3.38 ^{###}
On-demand TV programmes (e.g. streamed online or via a special device in your home)	3.54	3.63	3.68	3.45	3.32	3.49	3.55	3.65	3.72	3.48	3.62	3.36 ^{###}
National or local radio channels	3.48	3.59	3.69	3.24	3.22	3.40	3.54	3.70	3.63	3.36	3.56	3.36 ^{###}
Radio channels from another country	3.64	3.67	3.74	3.62	3.46	3.62	3.62	3.75	3.80	3.56	3.72	3.50 ^{###}
On-demand radio programmes (e.g. streamed online)	3.61	3.65	3.74	3.49	3.37	3.54	3.62	3.77	3.81	3.54	3.67	3.46 ^{###}

Mean score (0.00): 1= 'Often' ; 2= 'Occasionally' ; 3= 'Very rarely' ; 4= 'Never'

Base number (xxxx): number of people surveyed in the sample considered

ANOVA's for differences by country: [#] p<0.05; ^{##} p<0.01; ^{###} p<0.001. Significant results indicate that not all countries are equal.

Reported recall of e-cigarette advertising in national or local TV channels

As shown in table 5.5.2.4, people surveyed recalled e-cigarette advertising in national or local TV channels on average very rarely ($M=3.28$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 5,057 people surveyed who reported using the media was $M=3.21$, indicating that, on average, those who used this media also very rarely recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this media differed by country ($F(10, 5515)=22.01$, $p< 0.001$). The mean frequencies of reported recall were $M=2.98$ in Spain, $M=3.02$ in Greece and $M=3.06$ in the UK, therefore it was very rarely recalled on average in these countries. However, the mean frequencies in Lithuania and Denmark were $M=3.56$ and $M=3.54$ respectively, indicating that e-cigarette advertising was recalled either very rarely or never on average in these countries. Given the moderate use and recall correlation observed for this media (0.481), these results may be partially explained by the frequency of use of the media in these countries (cf. Table 5.5.2.1).

In addition, overall, young adults (15 to 24 years old) recalled more frequent ($M= 3.10$) e-cigarette advertising in national or local TV channels than adults (over 25) ($M= 3.34$) ($t(2457)= -8.00$, $p< 0.001$).

Moreover, across all countries users recalled e-cigarette advertising more frequently ($M=2.88$) than non-users ($M=3.30$) ($t(356)= 6.69$, $p< 0.001$).

Reported recall of e-cigarette advertising in TV channels from another country

As shown in table 5.5.2.4, people surveyed recalled e-cigarette advertising in TV channels from another country on average between very rarely and never ($M=3.50$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 3,989 people surveyed who reported using the media was $M=3.31$, indicating that, on average, those who used this media on average very rarely recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this media differed by country ($F(10, 5515)= 6.42$, $p< 0.001$). The mean frequencies of reported recall were $M=3.35$ in Spain and $M=3.38$ in the UK, therefore it was very rarely recalled on average. However, the mean frequencies in Denmark and the Netherlands were both $M=3.60$, and $M=3.62$ in Denmark, indicating that e-cigarette advertising was almost never recalled on average in these countries. Given the poor use and recall correlation observed for this media (-0.151), these results cannot be explained by the frequency of use of the media in these countries.

In addition, overall, young adults recalled more frequent ($M=3.36$) e-cigarette advertising in TV channels from another country than adults ($M=3.55$) ($t(2352)= -6.78$, $p< 0.001$).

Moreover, across all countries users recalled e-cigarette advertising more frequently ($M=3.08$) than non-users ($M=3.53$) ($t(348)= 7.27$, $p< 0.001$).

Reported recall of e-cigarette advertising in on-demand TV programmes (e.g. streamed online or via a special device in your home)

As shown in table 5.5.2.4, people surveyed recalled e-cigarette advertising in on-demand TV programmes on average between very rarely and never ($M=3.54$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 3,345 people surveyed who reported using the media was $M=3.24$, indicating that, on average, those who used this media on average very rarely recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this media differed by country ($F(10, 5515)=13.52, p< 0.001$). The mean frequencies of reported recall were $M=3.32$ in Spain and $M=3.36$ in the UK, therefore it was very rarely recalled on average. However, the mean frequencies in Netherlands, Denmark and Lithuania were $M=3.72$, $M=3.68$ and $M=3.65$ respectively, indicating that e-cigarette advertising was almost never recalled in these countries. Given the fairly strong use and recall correlation observed for this media (0.626), these results may be partially explained by the frequency of use of the media in these countries (cf. Table 5.5.2.1).

In addition, overall, young adults recalled more frequent ($M=3.44$) e-cigarette advertising in on-demand TV programmes than adults ($M=3.58$) ($t(2430)= -5.52, p< 0.001$).

Moreover, across all countries users recalled e-cigarette advertising more frequently ($M=3.11$) than non-users ($M=3.57$) ($t(349)= 7.74, p< 0.001$).

Reported recall of e-cigarette advertising in national or local radio channels

As shown in table 5.5.2.4, people surveyed recalled e-cigarette advertising in national or local radio channels on average between very rarely and never ($M=3.48$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 4,672 people surveyed who reported using the media was $M=3.39$, indicating that, on average, those who used this media also either very rarely or never recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this media differed by country ($F(10, 5515)=21.25, p< 0.001$). The mean frequencies of reported recall were $M=3.22$ in Spain and $M=3.24$ in Greece, therefore e-cigarette advertising was reportedly recalled very rarely on average. However, the mean frequencies in the Netherlands and Denmark were $M=3.70$ and $M=3.69$ indicating that e-cigarette advertising was almost never recalled in these countries on average. Given the fairly strong use and recall correlation observed for this media (0.605), these results may be partially explained by the frequency of use of the media in these countries (cf. Table 5.5.2.1).

In addition, overall, young adults recalled more frequent ($M=3.37$) e-cigarette advertising in national or local radio channels than adults ($M= 3.52$) ($t(2431)= -5.38, p< 0.001$).

Moreover, across all countries users recalled e-cigarette advertising more frequently ($M=3.08$) than non-users ($M=3.51$) ($t(351)= 7.14, p< 0.001$).

Reported recall of e-cigarette advertising in radio channels from another country

As shown in table 5.5.2.4, people surveyed recalled e-cigarette advertising in radio channels from another country on average either very rarely or never ($M=3.64$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 2,428 people surveyed who reported using the media was $M=3.18$, indicating that, on average, those who used this media very rarely recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this media differed by country ($F(10, 5515)=10.01$, $p<0.001$). The mean frequencies of reported recall were $M=3.46$ in Spain and $M=3.50$ in the UK, therefore e-cigarette advertising was reportedly recalled either very rarely or never on average. However, the mean frequencies in the Netherlands, Lithuania and Denmark were $M=3.80$, $M=3.75$ and $M=3.74$ indicating that e-cigarette advertising was almost never recalled in these countries on average. Given the fairly strong use and recall correlation observed for this media (0.553), these results may be partially explained by the frequency of use of the media in these countries (cf. Table 5.5.2.1).

In addition, overall, young adults recalled more frequent ($M=3.54$) e-cigarette advertising in radio channels from another country than adults ($M=3.68$) ($t(2328)=-5.34$, $p<0.001$).

Moreover, across all countries users recalled e-cigarette advertising more frequently ($M=3.26$) than non-users ($M=3.66$) ($t(347)=7.03$, $p<0.001$).

Reported recall of e-cigarette advertising in on-demand radio programmes (e.g. streamed online)

As shown in table 5.5.2.4, people surveyed recalled e-cigarette advertising in on-demand radio programmes on average either very rarely or never ($M=3.61$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 2,649 people surveyed who reported using the media was $M=3.18$, indicating that, on average, those who used this media very rarely recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this media differed by country ($F(10, 5515)=16.19$, $p<0.001$). The mean frequency of reported recall was $M=3.37$ in Spain, therefore e-cigarette advertising was very rarely recalled on average in this country. However, the mean frequencies in the Netherlands and Lithuania were $M=3.81$ and $M=3.77$ respectively, indicating that e-cigarette advertising was almost never recalled in these countries. This can be partly explained by the use and recall correlation, and the fact that this media was reported to be used on a monthly basis in Spain ($M=5.15$) on average, while in the Netherlands it was reportedly used less than monthly ($M=6.07$) and between monthly and less than monthly in Lithuania ($M=5.63$) (cf. Table 5.5.2.1).

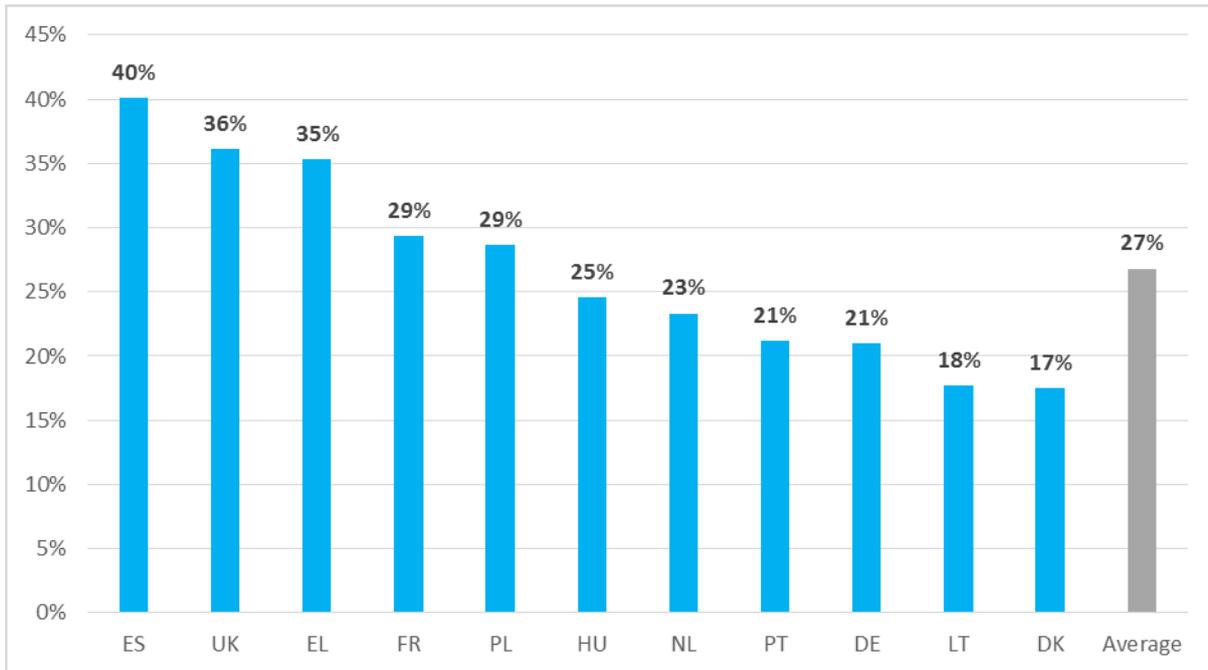
In addition, overall, young adults recalled more frequent ($M=3.50$) e-cigarette advertising in on-demand radio programmes than adults ($M=3.64$) ($t(2334)=-5.73$, $p<0.001$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the media on a monthly basis ($M=5.21$) while adults reported using it significantly less ($M=5.53$, i.e. between monthly and less than monthly) on average ($t(2631)=-5.03$, $p<0.001$, cf. Table 5.5.2.1).

Moreover, across all countries users recalled e-cigarette advertising more frequently ($M=3.21$) than non-users ($M=3.63$) ($t(347)=7.12$, $p<0.001$).

5.5.2.5 REPORTED RECALL OF E-CIGARETTE ADVERTISING IN AT LEAST ONE TYPE OF TV AND RADIO MEDIA

The figure below (5.5.2.5) shows the percentage of respondents per country who reported to recall e-cigarette advertising at least occasionally in at least one type of TV and radio media out of all people surveyed.

Figure 5.5.2.5: Reported recall of any form of e-cigarette advertising in at least one type of TV and radio media (% share of respondents who said often or occasionally for at least one TV and radio media, per country)



The chart shows the percentage of people in each country who responded “Often” or “Occasionally” for recall in at least one type of TV and radio media. The types of TV and radio media enquired about were: national or local TV channels, TV channels from another country, on-demand TV programmes (e.g. streamed online or via a special device in your home), national or local radio channels, radio channels from another country, and on-demand radio programmes (e.g. streamed online). All 5,526 individuals surveyed were taken into account in these values, not only the ones who reported using the TV and radio media.

Figure 5.5.2.5 represents the percentage of people surveyed who reported to have “often” or “occasionally” recalled e-cigarette advertising in at least one type of TV and radio media. These percentage rates for reported recall of e-cigarette advertising differed by country ($\chi^2(10)= 153.5, p < 0.001$).

Overall, the percentage of reported recall in at least one type of TV and radio media was 27%. 40% of respondents in Spain, 36% in the UK and 35% in Greece reported recall of e-cigarette advertising in at least one type of media. However, Lithuania and Denmark reported recall rates of 18% and 17% respectively.

Reported recall of e-cigarette advertising across TV and radio media was not frequent. However, even in countries with the lowest awareness, almost one in five participants recalled it.

5.5.2.6 REPORTED RECALL OF E-CIGARETTE PRODUCT PLACEMENT IN TV AND RADIO MEDIA

The following section presents the reported recall of e-cigarette product placement in the six types of TV and radio media considered. It should be noted that, for on-demand radio programmes, the frequencies of use and recall of e-cigarette product placement are positively correlated (correlation of 0.737). Furthermore, a moderate correlation between the frequency of reported use and recall was also found for national or local TV channels (0.488), on-demand TV programmes (0.617), national or local radio channels (0.600) and radio channels from another country (0.519). Finally, there was no correlation between use and recall for TV channels from another country (-0.197).

Across the six types of TV and radio media considered, participants, on average, reported recalling tobacco product placement “very rarely” or “never” with means ranging from 3.31 for national or local TV channels to 3.64 for radio channels from another country.

Table (5.5.2.6) shows the reported recall in the six types of TV and radio media by country.

Table 5.5.2.6: Reported recall of e-cigarette product placement in TV and radio media by Member State

	Total sample (5526)	DE (501)	DK (504)	EL (507)	ES (501)	FR (501)	HU (500)	LT (503)	NL (506)	PL (502)	PT (500)	UK (501)
National or local TV channels	3.31	3.45	3.56	3.06	3.01	3.27	3.35	3.61	3.47	3.20	3.35	3.10 ^{###}
TV channels from another country	3.51	3.60	3.63	3.51	3.33	3.54	3.46	3.65	3.62	3.45	3.47	3.39 ^{###}
On-demand TV programmes (e.g. streamed online or via a special device in your home)	3.55	3.62	3.66	3.45	3.33	3.52	3.56	3.70	3.73	3.50	3.61	3.36 ^{###}
National or local radio channels	3.50	3.59	3.69	3.25	3.22	3.43	3.55	3.74	3.67	3.39	3.58	3.39 ^{###}
Radio channels from another country	3.64	3.67	3.74	3.58	3.47	3.63	3.61	3.77	3.79	3.58	3.73	3.51 ^{###}
On-demand radio programmes (e.g. streamed online)	3.62	3.65	3.75	3.53	3.38	3.58	3.64	3.79	3.80	3.55	3.67	3.47 ^{###}

Mean score (0.00): 1= 'Often' ; 2= 'Occasionally' ; 3= 'Very rarely' ; 4= 'Never'

Base number (xxxx): number of people surveyed in the sample considered

ANOVA's for differences by country: [#] p<0.05; ^{###} p<0.01; ^{####} p<0.001. Significant results indicate that not all countries are equal.

Reported recall of e-cigarette product placement in national or local TV channels

As shown in table 5.5.2.6, people surveyed recalled e-cigarette product placement in national or local TV channels on average very rarely ($M=3.31$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 5,057 people surveyed who reported using the media was $M=3.25$, indicating that, on average, those who used this media also very rarely recalled e-cigarette product placement.

The frequency of recall of e-cigarette product placement in this media differed by country ($F(10, 5515)= 23.66$, $p < 0.001$). The mean frequencies of reported recall were $M=3.01$ in Spain, $M=3.06$ in Greece and $M=3.10$ in the UK, therefore it was very rarely recalled on average in these countries. However, the mean frequencies in Lithuania and Denmark were $M=3.61$ and $M=3.56$ respectively, indicating that e-cigarette product placement was recalled either very rarely or never on average in these countries. Given the moderate use and recall correlation observed for this media (0.488), these results may be partially explained by the frequency of use of the media in these countries (cf. Table 5.5.2.1).

In addition, overall, young adults (15 to 24 years old) recalled more frequent ($M= 3.14$) e-cigarette product placement in national or local TV channels than adults (over 25) ($M= 3.37$) ($t(2421)= -7.59$, $p < 0.001$).

Moreover, across all countries users recalled e-cigarette product placement more frequently ($M=2.89$) than non-users ($M=3.34$) ($t(354)= 7.02$, $p < 0.001$).

Reported recall of e-cigarette product placement in TV channels from another country

As shown in table 5.5.2.6, people surveyed recalled e-cigarette product placement in TV channels from another country on average between very rarely and never ($M=3.51$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 3,989 people surveyed who reported using the media was $M=3.33$, indicating that, on average, those who used this media on average very rarely recalled e-cigarette product placement.

The frequency of recall of e-cigarette product placement in this media differed by country ($F(10, 5515)= 8.14$, $p < 0.001$). The mean frequencies of reported recall were $M=3.33$ in Spain and $M=3.39$ in the UK, therefore it was very rarely recalled on average. However, the mean frequencies in Lithuania, Denmark and the Netherlands were $M=3.65$, $M=3.63$ and $M=3.62$, indicating that e-cigarette product placement was almost never recalled on average in these countries. Given the poor use and recall correlation observed for this media (-0.197), these results cannot be explained by the frequency of use of the media in these countries.

In addition, overall, young adults recalled more frequent ($M=3.38$) e-cigarette product placement in TV channels from another country than adults ($M=3.56$) ($t(2346)= -6.80$, $p < 0.001$).

Moreover, across all countries users recalled e-cigarette product placement more frequently ($M=3.13$) than non-users ($M=3.54$) ($t(349)= 6.71$, $p < 0.001$).

Reported recall of e-cigarette product placement in on-demand TV programmes (e.g. streamed online or via a special device in your home)

As shown in table 5.5.2.6, people surveyed recalled e-cigarette product placement in on-demand TV programmes on average between very rarely and never ($M=3.55$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 3,345 people surveyed who reported using the media was $M=3.25$, indicating that, on average, those who used this media very rarely recalled e-cigarette product placement.

The frequency of recall of e-cigarette product placement in this media differed by country ($F(10, 5515)= 13.72$, $p < 0.001$). The mean frequencies of reported recall were $M=3.33$ in Spain and $M=3.36$ in the UK, therefore it was very rarely recalled on average. However, the mean frequencies in the Netherlands and Lithuania were $M=3.73$ and $M=3.70$ respectively, indicating that e-cigarette product placement was almost never recalled in these countries. Given the fairly strong use and recall correlation observed for this media (0.617), these results may be partially explained by the frequency of use of the media in these countries (cf. Table 5.5.2.1).

In addition, overall, young adults recalled more frequent ($M=3.42$) e-cigarette product placement in on-demand TV programmes than adults ($M=3.60$) ($t(2337)= -6.62$, $p < 0.001$).

Moreover, across all countries users recalled e-cigarette product placement more frequently ($M=3.18$) than non-users ($M=3.57$) ($t(351)= 6.96$, $p < 0.001$).

Reported recall of e-cigarette product placement in national or local radio channels

As shown in table 5.5.2.6, people surveyed recalled e-cigarette product placement in national or local radio channels on average between very rarely and never ($M=3.50$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 4,672 people surveyed who reported using the media was $M=3.41$, indicating that, on average, those who used this media also either very rarely or never recalled e-cigarette product placement.

The frequency of recall of e-cigarette product placement in this media differed by country ($F(10, 5515)= 23.06$, $p < 0.001$). The mean frequencies of reported recall were $M=3.22$ in Spain and $M=3.25$ in Greece, therefore e-cigarette product placement was reportedly recalled very rarely on average. However, the mean frequencies in Lithuania, Denmark and the Netherlands were $M=3.74$, $M=3.69$ and $M=3.67$ indicating that e-cigarette product placement was almost never recalled in these countries on average. Given the fairly strong use and recall correlation observed for this media (0.600), these results may be partially explained by the frequency of use of the media in these countries (cf. Table 5.5.2.1).

In addition, overall, young adults recalled more frequent ($M=3.40$) e-cigarette product placement in national or local radio channels than adults ($M= 3.53$) ($t(2437)= -4.98$, $p < 0.001$).

Moreover, across all countries users recalled e-cigarette product placement more frequently ($M=3.10$) than non-users ($M=3.52$) ($t(349)= 6.97$, $p < 0.001$).

Reported recall of e-cigarette product placement in radio channels from another country

As shown in table 5.5.2.6, people surveyed recalled e-cigarette product placement in radio channels from another country on average either very rarely or never ($M=3.64$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who

reported using the media. Indeed, the mean calculated with only the 2,428 people surveyed who reported using the media was $M=3.19$, indicating that, on average, those who used this media very rarely recalled e-cigarette product placement.

The frequency of recall of e-cigarette product placement in this media differed by country ($F(10, 5515)= 10.12, p < 0.001$). The mean frequencies of reported recall were $M=3.47$ in Spain and $M=3.51$ in the UK, therefore e-cigarette product placement was reportedly recalled either very rarely or never on average. However, the mean frequencies in the Netherlands, Lithuania and Denmark were $M=3.79$, $M=3.77$ and $M=3.74$ indicating that e-cigarette product placement was almost never recalled in these countries on average. Given the fairly strong use and recall correlation observed for this media (0.519), these results may be partially explained by the frequency of use of the media in these countries (cf. Table 5.5.2.1).

In addition, overall, young adults recalled more frequent ($M= 3.56$) e-cigarette product placement in radio channels from another country than adults ($M= 3.68$) ($t(2368)= -4.87, p < 0.001$).

Moreover, across all countries users recalled e-cigarette product placement more frequently ($M=3.30$) than non-users ($M=3.67$) ($t(347)= 6.54, p < 0.001$).

Reported recall of e-cigarette product placement in on-demand radio programmes (e.g. streamed online)

As shown in table 5.5.2.6, people surveyed recalled e-cigarette product placement in on-demand radio programmes on average either very rarely or never ($M=3.62$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the media. Indeed, the mean calculated with only the 2,649 people surveyed who reported using the media was $M=3.21$, indicating that, on average, those who used this media very rarely recalled e-cigarette product placement.

The frequency of recall of e-cigarette product placement in this media differed by country ($F(10, 5515)= 15.40, p < 0.001$). The mean frequency of reported recall was $M=3.38$ in Spain, therefore e-cigarette product placement was very rarely recalled on average in this country. However, the mean frequencies in the Netherlands, Lithuania and Denmark were $M=3.80$, $M=3.79$ and $M=3.75$ respectively, indicating that e-cigarette product placement was almost never recalled in these countries. This can be partly explained by the use and recall correlation, and the fact that this media was reported to be used on a monthly basis in Spain ($M=5.15$) on average, while in the Netherlands it was reportedly used less than monthly ($M=6.07$), between monthly and less than monthly in Lithuania ($M=5.63$) and almost less than monthly in Denmark ($M=5.72$) (cf. Table 5.5.2.1).

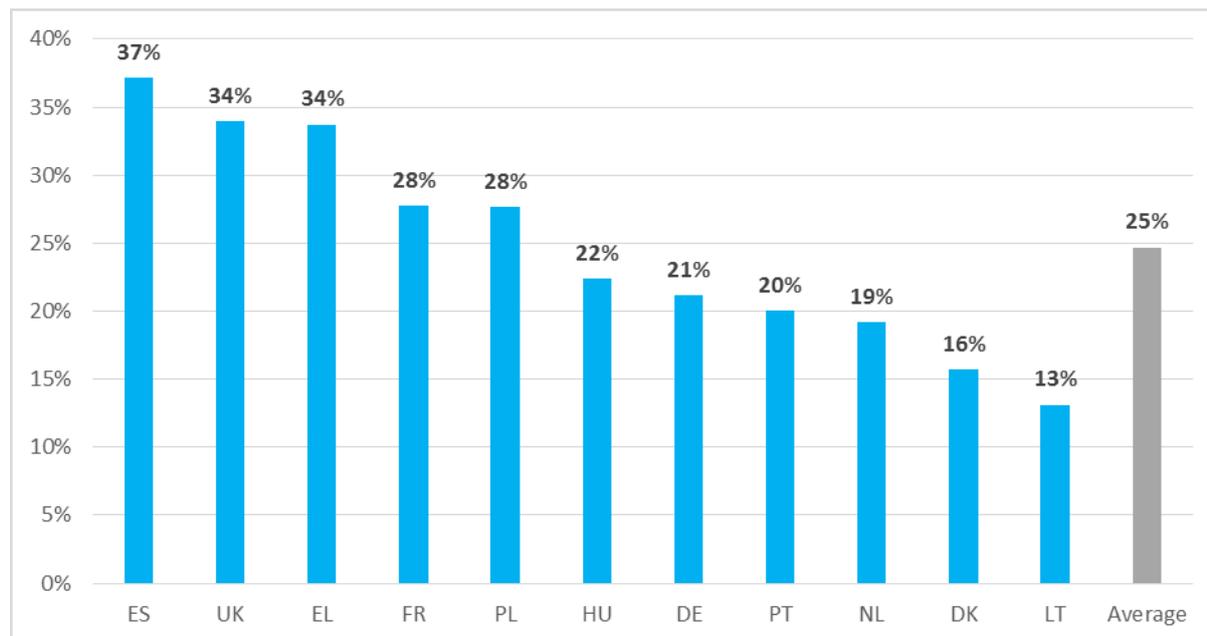
In addition, overall, young adults recalled more frequent ($M=3.52$) e-cigarette product placement in on-demand radio programmes than adults ($M=3.66$) ($t(2341)= -5.62, p < 0.001$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the media on a monthly basis ($M=5.21$) while adults reported using it significantly less ($M=5.53$, i.e. between monthly and less than monthly) on average ($t(2631)= -5.03, p < 0.001$, cf. Table 5.5.2.1).

Moreover, across all countries users recalled e-cigarette product placement more frequently ($M=3.26$) than non-users ($M=3.64$) ($t(350)= 6.93, p < 0.001$).

5.5.2.7 REPORTED RECALL OF E-CIGARETTE PRODUCT PLACEMENT IN AT LEAST ONE TYPE OF TV AND RADIO MEDIA

Although recall was low on average across the sample (cf. means in table 5.5.2.7), a significant proportion of respondents reported recalling e-cigarette product placement either “often” or “occasionally” in at least one type of TV and radio media.

Figure 5.5.2.7: Reported recall of any form of e-cigarette product placement in at least one type of TV and radio media (% share of respondents who said often or occasionally for at least one TV and radio media, per country)



The chart shows the percentage of people in each country who responded “Often” or “Occasionally” for recall in at least one type of TV and radio media. The types of TV and radio media enquired about were: national or local TV channels, TV channels from another country, on-demand TV programmes (e.g. streamed online or via a special device in your home), national or local radio channels, radio channels from another country, and on-demand radio programmes (e.g. streamed online). All 5,526 individuals surveyed were taken into account in these values, not only the ones who reported using the TV and radio media.

Figure 5.5.2.7 represents the percentage of people surveyed who reported to have “often” or “occasionally” recalled e-cigarette product placement in at least one type of TV and radio media. These percentage rates for reported recall of e-cigarette product placement differed by country ($\chi^2(10) = 169.1$, $p < 0.001$).

Overall, the percentage of reported recall in at least one type of TV and radio media was 25%.

Over a third of respondents in Spain (37%), the UK (34%) and Greece (34%) reported recall of e-cigarette product placement in at least one type of media. However, even in countries with the lowest awareness, more than a tenth of participants recalled e-cigarette product placement in at least one type of media.

Although reported recall of e-cigarette product placement across TV and radio media was not frequent, on average at least one person out of ten in all countries surveyed reported to recall seeing e-cigarette product placement either often or occasionally in at least one type of TV and radio media.

5.5.3 SUMMARY AND SYNTHESIS

Advertising activity

The Kantar data showed that radio advertising by tobacco companies had been purchased in Greece, and that TV and radio advertising had been purchased for e-cigarettes in Bulgaria, Denmark, France, Lithuania, Poland, Spain and the UK. There was no indication in the Kantar data of the nature of the radio advertising purchased by tobacco companies in Greece. It is possible that the advertising could have comprised professional recruitment, corporate social responsibility statements, statements about illicit tobacco or sponsorship of cultural events.

For five of the countries in which TV or radio advertising was found, the Kantar data did not indicate the name of the channel on which the advertising had been placed. We were unable therefore to assess whether the advertising had been on TV or radio, or what kind of audience might have been exposed to the advertising, and to make an assessment of young people's potential exposure. Where information was available, we could assess that the radio advertising in Greece placed by tobacco companies was on channels which were predominantly classified as '*mostly adult*', with a small amount placed on channels with a '*mixed*' audience, i.e. likely to have appealed to and been seen by both young people and adults. All of the e-cigarette advertising in Poland was on the radio, and was categorised as having been placed on channels aimed at a '*mixed*' audience (likely to appeal to and be heard by both young people and adults). These were largely local news and music radio channels.

Advertising share was examined (the proportion of overall advertising in TV and radio which was related to tobacco and e-cigarettes). In the only country where tobacco advertising was reported, Greece, just over 1,500 euros were spent for every million euros spent on total radio advertising, dropping to 96 euros for every million spent on total TV and radio advertising combined.

For e-cigarettes, the highest exposure in relation to TV and radio advertising combined was in Spain, where over 3,500 euros were spent on e-cigarette advertising for every million euros spent on total TV and radio advertising combined, followed by France (over 2,000 euros) and the UK (over 1,000 euros). There was much lower exposure in Bulgaria, Poland, Denmark and Lithuania.

When the e-cigarette advertising spend was examined in relation to total radio advertising (i.e. without TV advertising), the highest exposure was found in Spain again, with nearly 19,000 euros spent on e-cigarette advertising for every million euros spent on total radio advertising. Bulgaria had the second highest exposure in this calculation, with over 13,500 euros spent per million euros spent on total radio advertising, followed by France and the UK (over 11,000 and over 10,000 euros respectively). Poland, Denmark and Lithuania had much lower exposure.

Citizens' awareness and recall

Citizens reported viewing national or local TV channels 2-3 times a week on average, while TV channels from another country were viewed on average fortnightly and on-demand TV programmes more than once a month. National and local radio channels were reportedly used on a weekly basis on average, while radio channels from another country were used less than monthly and on-demand radio on average between monthly and less than monthly. Young people reported more frequent use of radio channels from another country and on-demand TV and radio than adults, although adults reported more use of national and local TV and radio and TV from another country.

There was low claimed recall of e-cigarette advertising and of tobacco and e-cigarette product placement on TV and radio, with respondents reporting that on average they recalled these very rarely or never.

When asked if they recalled e-cigarette advertising and tobacco and e-cigarette product placement at least occasionally in at least one of the six TV and radio media considered, 30% of people surveyed recalled tobacco product placement at least occasionally in at least one of the six TV and radio media considered, while 27% recalled e-cigarette advertising and 25% e-cigarette product placement.

Young people (15-24) recalled significantly more frequent e-cigarette advertising as well as tobacco and e-cigarette product placement than adults (25+) in all TV and radio media considered. However, adults reportedly used the media more often than young adults, apart from on-demand TV and radio programmes. Smokers and e-cigarette users recalled more frequent advertising and product placement than non-smokers and non-users in all types of media.

Synthesis

Tobacco advertising exposure

The only tobacco-related advertising spend recorded in the Kantar data for TV and radio was expenditure in Greece on radio advertising. There was no indication in the Kantar data of the nature of the radio advertising purchased by tobacco companies in Greece, although the Kantar data indicates that it was placed on channels which were predominantly classified as having a mostly adult audience. It is possible that the advertising could have comprised professional recruitment, corporate social responsibility statements, and statements about illicit tobacco or sponsorship of cultural events. Kantar did not hold information on product placement spend.

The citizens' survey did not ask about recall of tobacco advertising on TV and radio, as it was assumed there would not be any due to the widespread application of the ban on advertising in TV and radio. Respondents claimed to recall tobacco product placement very rarely or never on TV and radio. When asked if they recalled tobacco product placement at least occasionally in at least one of the six TV and radio media considered, 30% of people said that they recalled it. Without data on product placement spend, which is not held by Kantar, it is not possible to assess whether this recall was related to actual activity. Recall could have reflected simple recall of people smoking on TV and radio, or recall of specific brands and products. There is a need for better information on product placement spend.

E-cigarette advertising exposure

The Kantar data showed that TV and radio advertising had been purchased for e-cigarettes in Bulgaria, Denmark, France, Lithuania, Poland, Spain and the UK. In Poland, the e-cigarette advertising spend was all on radio, on channels categorised as having a mixed audience (ie. likely to appeal to both adults and young people). No information was available on the channels on which advertising was placed in the other countries.

When advertising share was calculated (the proportion of overall advertising in TV and radio which was related to e-cigarettes), the highest exposure in relation to TV and radio advertising combined was in Spain, followed by France and the UK, although overall share was small in all countries.

In the citizens' survey, citizens claimed to recall e-cigarette advertising and e-cigarette product placement on TV and radio very rarely or never. When asked if they recalled e-cigarette advertising

and e-cigarette product placement at least occasionally in at least one of the six TV and radio media considered, 27% recalled e-cigarette advertising and 25% e-cigarette product placement. These relatively low levels of recall appear consistent with the relatively low levels of advertising activity as reflected in the Kantar data. More systematic investigation of advertising activity and citizen recall in a few years' time, when the e-cigarette advertising environment is more stable, would be helpful. As with tobacco, there is also a need for better information on product placement spend.

5.6 WORK PACKAGE 6: POINTS OF SALE, SAMPLE, GIVEAWAY AND PROMOTIONAL ITEMS

The aim of this work package was to examine tobacco and e-cigarette product displays and advertising at point of sale (POS) in a range of retail outlets including vending machines. The work package also examined distribution of tobacco and related product samples, distribution of free gifts by tobacco and e-cigarette producers and retailers, and competitions and prize draws by tobacco and e-cigarette producers and retailers.

Two methods were used to provide information:

- Citizens' survey
- Key informants' survey

5.6.1 CITIZENS' SURVEY

5.6.1.1 RECALL OF TOBACCO AND E-CIGARETTE ADVERTISING IN RETAIL OUTLETS

In the survey, 5,526 individuals from eleven EU countries were asked how frequently they used each of ten different types of retail outlets: large stores (e.g. supermarket), small stores (e.g. convenience stores, newsagents), petrol / gas stations, cafés / restaurants, specialised alcohol retailers (e.g. off-licences), specialised tobacconists, specialised e-cigarette shops, tobacco vending machines, outdoor kiosks, mobile shops/vans, or street markets, and pharmacies. Responses were recorded on a seven point scale: 'Daily'; '2-3 times a week'; 'Weekly'; 'Once every two weeks'; 'Monthly'; 'Less than monthly'; and 'Never' (ranked on a scale of 1 to 7). For those retail outlets which they used they were then asked how frequently they noticed tobacco as well as e-cigarette advertising in each type of retail outlet. Responses were recorded separately for tobacco advertising and e-cigarette advertising on a four point scale: 'Often', 'Occasionally', 'Very rarely' or 'Never' (ranked from 1 to 4).

The tables in the following section present the mean values for the frequency of using each of the ten retail outlets and mean values for the frequencies of recalling tobacco advertising as well as recalling e-cigarette advertising in the same retail outlet.

5.6.1.1.1 REPORTED USE OF RETAIL OUTLETS

Table 5.6.1.1.1: Retail outlet use profile – Mean frequency of use

	Total sample (5526)	Age					Member State								
		Young people (15-24) (1485)	Adults (25+) (4041)	DE (501)	DK (504)	EL (507)	ES (501)	FR (501)	HU (500)	LT (503)	NL (506)	PL (502)	PT (500)	UK (501)	
Large stores (e.g. supermarket)	3.22	3.29	3.20	3.00	3.18	3.15	3.40	3.69	3.50	3.13	2.86	3.15	3.27	3.10 ^{###}	
Small stores (e.g. convenience stores, newsagents)	4.14	4.08	4.16	4.58	4.31	3.31	3.90	4.81	3.74	4.97	5.01	3.23	4.19	3.47 ^{###}	
Petrol / gas stations	4.42	4.50	4.40	4.28	4.46	3.85	4.10	4.80	4.87	4.74	4.95	4.04	4.42	4.15 ^{###}	
Cafés / restaurants	4.28	4.00	4.38 ^{***}	4.42	4.81	3.62	3.20	4.61	4.84	4.99	4.99	4.56	2.98	4.05 ^{###}	
Specialised alcohol retailers (e.g. off-licences)	5.43	5.19	5.52 ^{***}	5.66	5.95	4.77	5.21	5.54	5.64	5.87	5.90	4.45	5.92	4.80 ^{###}	
Specialised tobacconists	5.53	5.47	5.55	5.63	6.13	5.26	4.38	4.95	5.11	6.57	6.08	5.29	5.66	5.78 ^{###}	
Specialised e-cigarette shops	6.00	5.80	6.08 ^{***}	6.26	6.16	5.30	5.52	5.79	6.29	6.71	6.65	5.45	6.38	5.53 ^{###}	
Tobacco vending machines	5.98	5.73	6.07 ^{***}	5.54	6.31	6.01	4.79	6.15	6.27	6.73	6.42	6.14	5.41	5.96 ^{###}	
Outdoor kiosks, mobile shops/vans, or street markets	5.06	4.85	5.14 ^{***}	5.21	5.73	3.70	4.45	5.53	5.36	5.77	5.77	4.52	4.71	4.96 ^{###}	
Pharmacies	4.89	4.83	4.90	5.03	5.03	4.41	4.44	4.93	5.01	5.21	5.67	4.61	4.95	4.43 ^{###}	

Mean score (0.00): 1= 'Daily'; 2= '2-3 times a week'; 3= 'Weekly'; 4= 'Once every two weeks'; 5= 'Monthly'; 6= 'Less than monthly'; 7= 'Never'

Base number (xxxx): number of people surveyed in the sample considered

t-tests for differences by age: * p<0.05; ** p<0.01; *** p<0.001

ANOVA's for differences by country: # p<0.05; ## p<0.01; ### p<0.001. Significant results indicate that not all countries are equal.

Table 5.6.1.1.1 presents mean frequency of reported use of retail outlets in the eleven countries surveyed. On average, respondents went to large stores weekly on average ($M=3.22$), while they went to small stores on average fortnightly ($M=4.14$), petrol / gas stations were used between fortnightly and once a month ($M=4.42$), and cafés / restaurants were reportedly visited on a fortnightly basis on average ($M=4.28$). In addition, specialised alcohol retailers and specialised tobacconists were visited between monthly and less than monthly ($M=5.43$ and $M=5.53$ respectively), while specialised e-cigarette shops and tobacco vending machines were used less than monthly on average ($M=6.00$ and $M=5.98$ respectively). Finally, outdoor kiosks, mobile shops/vans, or street markets and pharmacies were visited on a monthly basis on average ($M=5.06$ and $M=4.89$ respectively).

The results also showed that young adults (15-24) reported using cafés / restaurants, specialised alcohol retailers, specialised e-cigarette shops, tobacco vending machines as well as outdoor kiosks, mobile shops/vans, or street markets significantly more frequently than adults (25+). Indeed, young adults reported visiting cafés / restaurants once every two weeks ($M=4.00$) while adults reported visiting them between fortnightly and monthly ($M=4.38$) ($t(2695) = -6.67$, $p < 0.001$). In addition, young adults went to specialised alcohol retailers on average monthly ($M=5.19$) while adults reported going between monthly and less than monthly ($M=5.52$) ($t(2435) = -5.69$, $p < 0.001$). While average responses for visiting specialised e-cigarette shops and tobacco vending machines approximated to less than monthly for young adults ($M=5.80$ and $M=5.73$ respectively) and adults ($M=6.08$ and $M=6.07$ respectively), adults reported less frequent use of such outlets ($t(2444) = -5.08$, $p < 0.001$, and $t(2383) = -6.05$, $p < 0.001$ respectively).

However, there was no significant difference of mean use between young adults and adults regarding large and small stores ($t(2560) = 1.73$, $p > 0.05$ and $t(2657) = -1.21$, $p > 0.05$), petrol / gas stations ($t(2512) = 1.74$, $p > 0.05$), specialised tobacconists ($t(2620) = -1.42$, $p > 0.05$) and pharmacies ($t(2422) = -1.37$, $p > 0.05$) (cf. Table 5.6.1.1.1 for all types of retail outlets).

Frequency of using each type of retail outlet differed across countries (large stores $F(10, 5515) = 9.38$, $p < 0.001$; small stores $F(10, 5515) = 59.14$, $p < 0.001$; petrol / gas stations $F(10, 5515) = 21.48$, $p < 0.001$; cafés / restaurants $F(10, 5515) = 79.82$, $p < 0.001$; specialised alcohol retailers $F(10, 5515) = 47.66$, $p < 0.001$; specialised tobacconists $F(10, 5515) = 57.86$, $p < 0.001$; specialised e-cigarette shops $F(10, 5515) = 47.64$, $p < 0.001$; tobacco vending machines $F(10, 5515) = 52.16$, $p < 0.001$; outdoor kiosks, mobile shops/vans, or street markets $F(10, 5515) = 67.00$, $p < 0.001$; pharmacies $F(10, 5515) = 30.65$, $p < 0.001$).

5.6.1.1.2 REPORTED RECALL OF TOBACCO ADVERTISING IN RETAIL OUTLETS

The following section presents the reported recall of tobacco advertising in the nine types of retail outlets considered (pharmacies were not taken into account for tobacco advertising, as they were not relevant). It should be noted that, for all retail outlets except for large stores (correlation of 0.122), the frequencies of use and recall of tobacco advertising were positively correlated. There was a fairly strong correlation for small stores (0.673) and petrol / gas stations (0.654). Furthermore, there was a very strong positive correlation for the remaining retail outlets. Indeed, the positive correlation factors were 0.929 for cafés / restaurants, 0.932 for specialised alcohol retailers, 0.920 for specialised tobacconists, 0.977 for specialised e-cigarette shops, 0.993 for tobacco vending machines, and 0.964 for outdoor kiosks, mobile shops/vans, or street markets.

Across the nine types of retail outlets considered, participants, on average, reported recalling tobacco advertising “very rarely” or “never” with means ranging from 3.14 for small stores to 3.47 for specialised e-cigarette shops.

Table (5.6.1.1.2) presents the reported recall in the nine types of retail outlets by country.

Table 5.6.1.1.2: Reported recall of tobacco advertising in retail outlets by Member State

	Total sample (5526)	DE (501)	DK (504)	EL (507)	ES (501)	FR (501)	HU (500)	LT (503)	NL (506)	PL (502)	PT (500)	UK (501)
Large stores (e.g. supermarket)	3.26	3.17	3.52	2.98	3.18	3.41	3.42	3.34	3.50	2.92	3.15	3.24 ^{###}
Small stores (e.g. convenience stores, newsagents)	3.14	3.08	3.42	2.37	3.03	3.41	3.39	3.45	3.45	2.92	2.87	3.13 ^{###}
Petrol / gas stations	3.17	2.81	3.49	3.03	2.92	3.39	3.42	3.40	3.40	2.93	2.81	3.32 ^{###}
Cafés / restaurants	3.33	3.41	3.68	3.02	2.90	3.40	3.52	3.48	3.53	3.35	2.92	3.44 ^{###}
Specialised alcohol retailers (e.g. off-licences)	3.38	3.46	3.63	3.04	3.17	3.49	3.53	3.57	3.70	2.83	3.47	3.28 ^{###}
Specialised tobacconists	3.16	3.12	3.54	2.80	2.46	2.95	3.25	3.71	3.47	3.02	3.11	3.38 ^{###}
Specialised e-cigarette shop	3.47	3.57	3.61	3.03	3.15	3.41	3.65	3.86	3.80	3.11	3.64	3.34 ^{###}
Tobacco vending machines	3.44	3.21	3.65	3.38	2.78	3.58	3.62	3.85	3.66	3.48	3.15	3.45 ^{###}
Outdoor kiosks, mobile shops/vans, or street markets	3.26	3.18	3.58	2.59	3.03	3.50	3.50	3.56	3.60	3.02	2.95	3.35 ^{###}
Pharmacies	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Mean score (0.00): 1= 'Often' ; 2= 'Occasionally' ; 3= 'Very rarely' ; 4= 'Never'

Base number (xxxx): number of people surveyed in the sample considered

ANOVA's for differences by country: # p<0.05; ## p<0.01; ### p<0.001. Significant results indicate that not all countries are equal.

Reported recall of tobacco advertising in large stores (e.g. supermarkets)

As shown in table 5.6.1.1.2, people surveyed recalled tobacco advertising in large stores on average very rarely ($M=3.26$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the retail outlet. Indeed, the mean calculated with only the 5,009 people surveyed who reported using the retail outlet was $M=3.18$, indicating that, on average, those who used this retail outlet also very rarely recalled tobacco advertising.

The frequency of recall of tobacco advertising in this retail outlet differed by country ($F(10, 5515)=21.98$, $p< 0.001$). The mean frequency of reported recall was $M=2.98$ in Greece and $M=2.92$ in Poland, therefore it was recalled on average very rarely in these countries. However, the mean frequencies in Denmark and the Netherlands were $M=3.52$ and $M=3.50$ respectively, indicating that it was seen either very rarely or never in these countries. The use and recall correlation observed for this retail outlet being 0.122, these results cannot be explained by the frequency of use of the retail outlet in these countries.

In addition, overall, young adults (15 to 24 years old) recalled more frequent ($M=3.13$) tobacco advertising in large stores than adults (over 25) ($M= 3.30$) ($t(2505)= -5.62$, $p< 0.001$).

Moreover, across all countries smokers recalled tobacco advertising more frequently ($M=3.17$) than non-smokers ($M=3.31$) ($t(3765)= 4.98$, $p< 0.05$).

Reported recall of tobacco advertising in small stores (e.g. convenience stores, newsagents)

As shown in table 5.6.1.1.2, people surveyed recalled tobacco advertising in small stores on average very rarely ($M=3.14$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the retail outlet. Indeed, the mean calculated with only the 4,593 people surveyed who reported using the retail outlet was $M=2.96$, indicating that, on average, those who used this retail outlet on average also very rarely recalled tobacco advertising.

The frequency of recall of tobacco advertising in this retail outlet differed by country ($F(10, 5515)=59.73$, $p< 0.001$). The mean frequency of reported recall was $M=2.37$ in Greece, therefore it was occasionally recalled on average. However, the mean frequencies in Lithuania and the Netherlands were both $M=3.45$, indicating that it was either very rarely or never recalled on average in these countries. Given the fairly strong use and recall correlation observed for this retail outlet (0.673), these results may be partially explained by the frequency of use of the retail outlet in these countries.

In addition, overall, young adults recalled more frequent ($M=2.99$) tobacco advertising in small stores than adults ($M=3.19$) ($t(2495)= -6.17$, $p< 0.001$).

Moreover, across all countries smokers recalled tobacco advertising more frequently ($M=2.99$) than non-smokers ($M=3.22$) ($t(3723)= 7.76$, $p< 0.001$).

Reported recall of tobacco advertising in petrol / gas stations

As shown in table 5.6.1.1.2, people surveyed recalled tobacco advertising in petrol / gas stations on average very rarely ($M=3.17$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the retail outlet.

Indeed, the mean calculated with only the 4,507 people surveyed who reported using the retail outlet was $M=2.99$, indicating that, on average, those who used this retail outlet on average also very rarely recalled tobacco advertising.

The frequency of recall of tobacco advertising in this retail outlet differed by country ($F(10, 5515)=38.36$, $p < 0.001$). The mean frequency of reported recall was $M=2.81$ in both Germany and Portugal, therefore it was very rarely recalled on average. However, the mean frequencies in Denmark and Hungary were $M=3.49$ and $M=3.42$ respectively, indicating that it was either very rarely or never seen in these countries. Given the fairly strong use and recall correlation observed for this retail outlet (0.654), these results may be partially explained by the frequency of use of the retail outlet in these countries.

In addition, overall, young adults recalled more frequent ($M=3.02$) tobacco advertising in petrol / gas stations than adults ($M=3.23$) ($t(2480)=-6.64$, $p < 0.001$).

Moreover, across all countries smokers recalled tobacco advertising more frequently ($M=3.04$) than non-smokers ($M=3.25$) ($t(3692)=7.22$, $p < 0.001$).

Reported recall of tobacco advertising in cafés / restaurants

As shown in table 5.6.1.1.2, people surveyed recalled tobacco advertising in cafés / restaurants on average very rarely ($M=3.33$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the retail outlet. Indeed, the mean calculated with only the 4,713 people surveyed who reported using the retail outlet was $M=3.22$, indicating that, on average, those who used this retail outlet also very rarely recalled tobacco advertising.

The frequency of recall of tobacco advertising in this retail outlet differed by country ($F(10, 5515)=42.24$, $p < 0.001$). The mean frequency of reported recall was $M=2.90$ in Spain and $M=2.92$ in Portugal, therefore tobacco advertising was reportedly very rarely recalled on average in these countries. However, the mean frequency in Denmark was $M=3.68$, indicating that it was almost never recalled in this country on average. This can be partly explained by the use and recall correlation for this retail outlet, and the fact that it was reported to be used weekly on average in Spain and Portugal ($M=3.20$ and $M=2.98$ respectively), while in Denmark it was reportedly used monthly ($M=4.81$) (cf. Table 5.6.1.1.1).

In addition, overall, young adults recalled more frequent ($M=3.24$) tobacco advertising in cafés / restaurants than adults ($M=3.37$) ($t(2501)=-4.27$, $p < 0.001$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the retail outlet on a fortnightly basis ($M=4.00$) while adults reported using it significantly less ($M=4.38$) on average ($t(2695)=-6.67$, $p < 0.001$, cf. Table 5.6.1.1.1).

Moreover, across all countries smokers recalled tobacco advertising more frequently ($M=3.23$) than non-smokers ($M=3.39$) ($t(3711)=5.80$, $p < 0.001$).

Reported recall of tobacco advertising in specialised alcohol retailers (e.g. off-licences)

As shown in table 5.6.1.1.2, people surveyed recalled tobacco advertising in specialised alcohol retailers on average very rarely ($M=3.38$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the

retail outlet. Indeed, the mean calculated with only the 3,329 people surveyed who reported using the retail outlet was $M=2.97$, indicating that, on average, those who used this retail outlet also very rarely recalled tobacco advertising.

The frequency of recall of tobacco advertising in this retail outlet differed by country ($F(10, 5515)=43.91$, $p< 0.001$). The mean frequency of reported recall was $M=2.83$ in Poland, therefore tobacco advertising in this retail outlet was on average very rarely recalled in this country. However, the mean frequencies in the Netherlands and Denmark were $M=3.70$ and $M=3.63$ respectively, indicating that tobacco advertising was almost never recalled in these countries on average. This can be partly explained by the use and recall correlation for this retail outlet, and the fact that it was reported to be used between fortnightly and monthly on average in Poland ($M=4.45$), while in the Netherlands and Denmark it was reportedly used less than monthly ($M=5.90$ and $M=5.95$ respectively) (cf. Table 5.6.1.1.1).

In addition, overall, young adults recalled more frequent ($M= 3.22$) tobacco advertising in specialised alcohol retailers from another country than adults ($M= 3.44$) ($t(2369)= -6.93$, $p< 0.001$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the retail outlet on a monthly basis ($M=5.19$) while adults reported using it significantly less ($M=5.52$, i.e. between monthly and less than monthly) on average ($t(2435)= -5.69$, $p< 0.001$, cf. Table 5.6.1.1.1).

Moreover, across all countries smokers recalled tobacco advertising more frequently ($M=3.25$) than non-smokers ($M=3.45$) ($t(3581)= 7.23$, $p< 0.001$).

Reported recall of tobacco advertising in specialised tobaccoconists

As shown in table 5.6.1.1.2, people surveyed recalled tobacco advertising in specialised tobaccoconists on average very rarely ($M=3.16$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the retail outlet. Indeed, the mean calculated with only the 2,721 people surveyed who reported using the retail outlet was $M=2.30$, indicating that, on average, those who used this retail outlet occasionally recalled tobacco advertising.

The frequency of recall of tobacco advertising in this retail outlet differed by country ($F(10, 5515)=53.41$, $p< 0.001$). The mean frequency of reported recall was $M=2.46$ in Spain, therefore advertising was either occasionally or very rarely recalled on average. However, the mean frequency in Lithuania was $M=3.71$, indicating that tobacco advertising was almost never recalled. This can be partly explained by the use and recall correlation for this retail outlet, and the fact that it was reported to be used fortnightly on average in Spain ($M=4.38$), while in Lithuania it was reportedly used between less than monthly and never ($M=6.57$) (cf. Table 5.6.1.1.1).

In addition, overall, young adults recalled more frequent ($M=3.08$) tobacco advertising in specialised tobaccoconists than adults ($M=3.19$) ($t(2535)= -3.03$, $p< 0.01$). However, this cannot be explained by the use and recall correlation, as there was no significant difference between young adults and adults in terms of the mean use frequency of the retail outlet ($t(2620)= -1.42$, $p> 0.05$, cf. Table 5.6.1.1.1).

Moreover, across all countries smokers recalled tobacco advertising more frequently ($M=2.68$) than non-smokers ($M=3.43$) ($t(3382)= 22.62$, $p< 0.001$).

Reported recall of tobacco advertising in specialised e-cigarette shops

As shown in table 5.6.1.1.2, people surveyed recalled tobacco advertising in specialised e-cigarette shops on average either very rarely or never ($M=3.47$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the retail outlet. Indeed, the mean calculated with only the 1,885 people surveyed who reported using the retail outlet was $M=2.44$, indicating that, on average, those who used this retail outlet either occasionally or very rarely recalled tobacco advertising.

The frequency of recall of tobacco advertising in this retail outlet differed by country ($F(10, 5515)=45.51$, $p < 0.001$). The mean frequency of reported recall was $M=3.03$ in Greece and $M=3.11$ in Portugal, therefore advertising was very rarely recalled on average in these countries. However, the mean frequencies in Lithuania and the Netherlands were $M=3.86$ and $M=3.80$ respectively, indicating that tobacco advertising was almost never recalled in these countries. This can be partly explained by the use and recall correlation for this retail outlet, and the fact that it was reported to be used monthly on average in Greece ($M=5.30$) as well as between monthly and less than monthly in Poland ($M=5.45$), while in Lithuania and the Netherlands it was reportedly almost never used ($M=6.71$ and $M=6.65$ respectively) (cf. Table 5.6.1.1.1).

In addition, overall, young adults recalled more frequent ($M=3.37$) tobacco advertising in specialised e-cigarette shops than adults ($M=3.51$) ($t(2461) = -4.45$, $p < 0.001$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the retail outlet over less than monthly ($M=5.80$) while adults reported using it significantly less ($M=6.08$, i.e. less than monthly) on average ($t(2444) = -5.08$, $p < 0.001$, cf. Table 5.6.1.1.1).

Moreover, across all countries smokers recalled tobacco advertising more frequently ($M=3.28$) than non-smokers ($M=3.57$) ($t(3392) = 10.08$, $p < 0.001$).

However, the apparent presence of tobacco advertising in e-cigarette shops can seem odd. Indeed, survey respondents could have mistaken e-cigarette advertising for tobacco advertising in these shops. As these results were only based on respondents' recall, they showed what people surveyed recalled, which can prove untrue.

Reported recall of tobacco advertising in tobacco vending machines

As shown in table 5.6.1.1.2, people surveyed recalled tobacco advertising in tobacco vending machines on average either very rarely or never ($M=3.44$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the retail outlet. Indeed, the mean calculated with only the 1,857 people surveyed who reported using the retail outlet was $M=2.33$, indicating that, on average, those who used this retail outlet occasionally recalled tobacco advertising.

The frequency of recall of tobacco advertising in this retail outlet differed by country ($F(10, 5515)=48.72$, $p < 0.001$)⁴⁹. The mean frequency of reported recall was $M=2.78$ in Spain, therefore advertising

⁴⁹ Tobacco vending is banned in Bulgaria, Cyprus, Estonia, Finland, France, Greece, Hungary, Latvia, Lithuania, Romania, Slovakia, Slovenia and the UK. As with any survey work, there is a risk that reported recall in the citizens' survey may lead to overstatement because recall can be more a measure of salience than of actual advertising activity, and people's memories do not necessarily keep within the 12-month timeframe indicated in the survey questionnaire. It may be for these reasons that recall was reported in countries without TVMs.

was very rarely recalled on average. However, the mean frequency in Lithuania was $M=3.85$, indicating that tobacco advertising was almost never recalled in this country. This can be partly explained by the use and recall correlation for this retail outlet, and the fact that it was reportedly used monthly on average in Spain ($M=4.79$), while in Lithuania it was reportedly almost never used ($M=6.73$) (cf. Table 5.6.1.1.1).

In addition, overall, young adults recalled more frequent ($M=3.29$) tobacco advertising in tobacco vending machines than adults ($M=3.49$) ($t(2357) = -6.22$, $p < 0.001$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the retail outlet over less than monthly ($M=5.73$) while adults reported using it significantly less ($M=6.07$, i.e. less than monthly) on average ($t(2383) = -6.05$, $p < 0.001$, cf. Table 5.6.1.1.1).

Moreover, across all countries smokers recalled tobacco advertising more frequently ($M=3.14$) than non-smokers ($M=3.60$) ($t(3134) = 15.59$, $p < 0.001$).

Reported recall of tobacco advertising in outdoor kiosks, mobile shops/vans, or street markets

As shown in table 5.6.1.1.2, people surveyed recalled tobacco advertising in outdoor kiosks, mobile shops/vans, or street markets on average very rarely ($M=3.26$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the retail outlet. Indeed, the mean calculated with only the 3,709 people surveyed who reported using the retail outlet was $M=2.90$, indicating that, on average, those who used this retail outlet also very rarely recalled tobacco advertising.

The frequency of recall of tobacco advertising in this retail outlet differed by country ($F(10, 5515) = 60.99$, $p < 0.001$). The mean frequency of reported recall was $M=2.59$ in Greece, therefore advertising was either occasionally or very rarely recalled on average in this country. However, the mean frequencies in the Netherlands, Denmark and Lithuania were $M=3.60$, $M=3.58$ and $M=3.56$ respectively, indicating that tobacco advertising was either very rarely or never recalled in these countries. This can be partly explained by the use and recall correlation for this retail outlet, and the fact that it was reported to be used fortnightly on average in Greece ($M=3.70$), while in the Netherlands, Denmark and Lithuania it was reportedly used less than monthly ($M=5.77$, $M=5.73$ and $M=5.77$ respectively) (cf. Table 5.6.1.1.1).

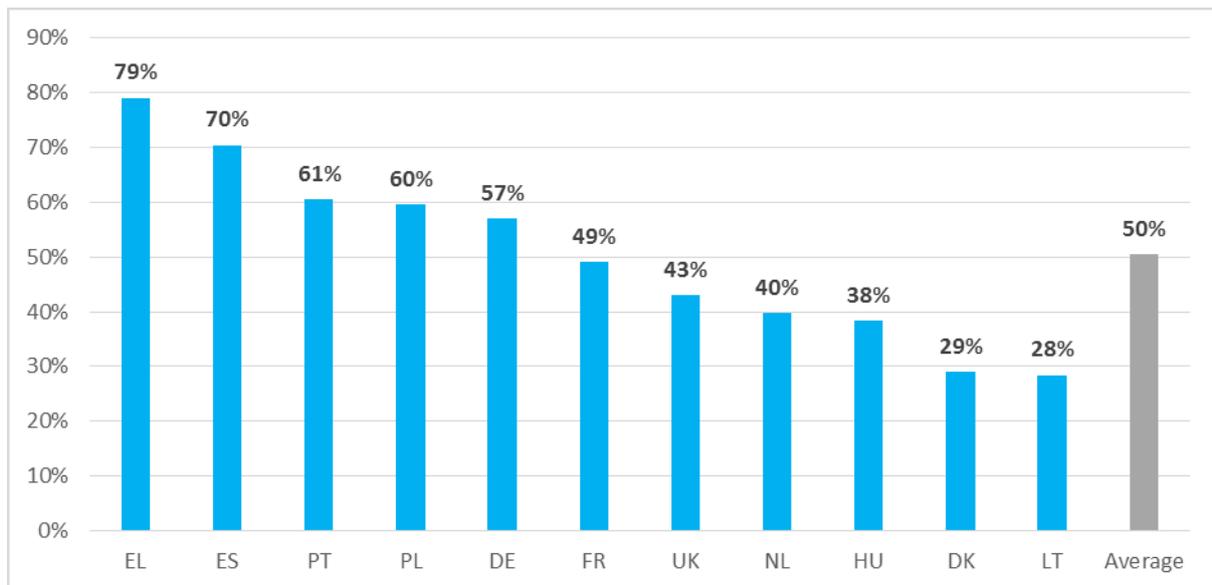
In addition, overall, young adults recalled more frequent ($M=3.12$) tobacco advertising in outdoor kiosks, mobile shops/vans, or street markets than adults ($M=3.31$) ($t(2437) = -6.03$, $p < 0.001$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the retail outlet more than monthly ($M=4.85$) while adults reported using it significantly less ($M=5.14$, i.e. monthly) on average ($t(2550) = -4.84$, $p < 0.001$, cf. Table 5.6.1.1.1).

Moreover, across all countries smokers recalled tobacco advertising more frequently ($M=3.11$) than non-smokers ($M=3.34$) ($t(3619) = 8.05$, $p < 0.001$).

5.6.1.1.3 REPORTED RECALL OF TOBACCO ADVERTISING IN AT LEAST ONE RETAIL OUTLET

Although frequency of recall was low on average across the sample (cf. means in table 5.6.1.1.2), a significant proportion of respondents reported recalling tobacco advertising either “often” or “occasionally” in at least one retail outlet.

Figure 5.6.1.1.3: Reported recall of any form of tobacco advertising in *at least one* retail outlet (% share of respondents who said often or occasionally for at least one retail outlet, per country)



The chart shows the percentage of people in each country who responded “Often” or “Occasionally” for recall in at least one type of retail outlet. The types of retail outlets enquired about were: large stores (e.g. supermarket), small stores (e.g. convenience stores, newsagents), petrol / gas stations, cafés / restaurants, specialised alcohol retailers (e.g. off-licences), specialised tobacconists, specialised e-cigarette shop, tobacco vending machines, outdoor kiosks, mobile shops/vans, or street markets, and pharmacies. All 5,526 individuals surveyed were taken into account in these values, not only the ones who reported using the retail outlets.

As shown in figure 5.6.1.1.3, on average 50% of all those surveyed reported to have often or occasionally observed tobacco advertising in *at least one* of the nine types of retail outlets. These percentage rates for reported recall of tobacco advertising differed by country ($\chi^2(10) = 546.8, p < 0.001$). This figure was 79% in Greece, 70% in Spain, 61% in Portugal and 60% in Poland. It is interesting to note that in Lithuania and Denmark, at the lower end of the scale (28% and 29% respectively), still more than a quarter of those surveyed reported to recall tobacco advertising in at least one type of retail outlet at least occasionally.

Indeed, even though the average reported recall figures were low across all types of retail outlets (cf. table 5.6.1.1.2) a considerable proportion of the population reported recalling tobacco advertising in retail outlets.

5.6.1.1.4 REPORTED RECALL OF E-CIGARETTE ADVERTISING IN RETAIL OUTLETS

The following section presents the reported recall of e-cigarette advertising in the ten retail outlets considered. It should be noted that, for all retail outlets except for large stores (correlation of -0.191), the frequencies of use and recall of tobacco advertising were positively correlated. There was a use and recall correlation for small stores (0.810), petrol / gas stations (0.738), cafés / restaurants (0.849), tobacco vending machines (0.851) and pharmacies (0.886). Furthermore, there was a strong positive correlation for the remaining retail outlets. Indeed, the correlation factors were 0.967 for specialised alcohol retailers, 0.935 for specialised tobacconists, 0.992 for specialised e-cigarette shop, and 0.936 for outdoor kiosks, mobile shops/vans, or street markets.

Across the ten types of retail outlets considered, participants, on average, reported recalling tobacco advertising “very rarely” or “never” with means ranging from 3.34 for specialised tobacconists to 3.62 for tobacco vending machines.

Table (5.6.1.1.4) presents the reported recall in the ten types of retail outlets by country.

Table 5.6.1.1.4: Reported recall of e-cigarette advertising in retail outlets by Member State

	Total sample (5526)	DE (501)	DK (504)	EL (507)	ES (501)	FR (501)	HU (500)	LT (503)	NL (506)	PL (502)	PT (500)	UK (501)
Large stores (e.g. supermarket)	3.37	3.47	3.61	3.23	3.23	3.40	3.42	3.58	3.62	3.01	3.30	3.21 ^{###}
Small stores (e.g. convenience stores, newsagents)	3.35	3.44	3.57	2.96	3.19	3.41	3.49	3.68	3.63	3.19	3.22	3.11 ^{###}
Petrol / gas stations	3.40	3.41	3.61	3.35	3.18	3.42	3.53	3.64	3.57	3.15	3.29	3.25 ^{###}
Cafés / restaurants	3.50	3.57	3.68	3.33	3.23	3.42	3.56	3.68	3.72	3.47	3.38	3.45 ^{###}
Specialised alcohol retailers (e.g. off-licences)	3.49	3.56	3.71	3.29	3.31	3.50	3.56	3.70	3.76	3.10	3.63	3.31 ^{###}
Specialised tobacconists	3.34	3.39	3.65	3.10	2.85	3.03	3.42	3.78	3.60	3.15	3.33	3.45 ^{###}
Specialised e-cigarette shop	3.41	3.53	3.52	2.92	3.09	3.27	3.63	3.85	3.80	3.10	3.59	3.18 ^{###}
Tobacco vending machines	3.62	3.53	3.73	3.51	3.27	3.60	3.69	3.87	3.82	3.56	3.64	3.54 ^{###}
Outdoor kiosks, mobile shops/vans, or street markets	3.44	3.49	3.66	3.15	3.20	3.49	3.57	3.70	3.70	3.31	3.29	3.28 ^{###}
Pharmacies	3.51	3.59	3.65	3.25	3.23	3.48	3.54	3.80	3.74	3.54	3.51	3.28 ^{###}

Mean score (0.00): 1= 'Often' ; 2= 'Occasionally' ; 3= 'Very rarely' ; 4= 'Never'

Base number (xxxx): number of people surveyed in the sample considered

ANOVA's for differences by country: [#] p<0.05; ^{##} p<0.01; ^{###} p<0.001. Significant results indicate that not all countries are equal.

Reported recall of e-cigarette advertising in large stores (e.g. supermarkets)

As shown in table 5.6.1.1.4, people surveyed recalled e-cigarette advertising in large stores on average very rarely ($M=3.37$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the retail outlet. Indeed, the mean calculated with only the 5,009 people surveyed who reported using the retail outlet was $M=3.31$, indicating that, on average, those who used this retail outlet also very rarely recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this retail outlet differed by country ($F(10, 5515)=22.91$, $p<0.001$). The mean frequency of reported recall was $M=3.01$ in Poland, therefore e-cigarette advertising was recalled on average very rarely. However, the mean frequencies in Denmark, the Netherlands and Lithuania were $M=3.61$, $M=3.62$ and $M=3.58$ respectively, indicating that it was seen either very rarely or never in these countries. Given the poor use and recall correlation observed for this retail outlet (-0.191), these results cannot be explained by the frequency of use of the retail outlet in these countries.

In addition, overall, young adults (15 to 24 years old) recalled more frequent ($M=3.22$) e-cigarette advertising in large stores than adults (over 25) ($M=3.45$) ($t(2393)=-6.89$, $p<0.001$).

Moreover, across all countries e-cigarette users recalled e-cigarette advertising more frequently ($M=2.97$) than non-users ($M=3.40$) ($t(356)=7.09$, $p<0.001$).

Reported recall of e-cigarette advertising in small stores (e.g. convenience stores, newsagents)

As shown in table 5.6.1.1.4, people surveyed recalled e-cigarette advertising in small stores on average very rarely ($M=3.35$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the retail outlet. Indeed, the mean calculated with only the 4,593 people surveyed who reported using the retail outlet was $M=3.22$, indicating that, on average, those who used this retail outlet also very rarely recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this retail outlet differed by country ($F(10, 5515)=34.39$, $p<0.001$). The mean frequencies of reported recall were $M=2.96$ in Greece and $M=3.11$ in the UK, therefore it was very rarely recalled on average. However, the mean frequencies in Lithuania and the Netherlands were $M=3.68$ and $M=3.63$ respectively, indicating that, on average, it was almost never recalled in these countries. This can be partly explained by the use and recall correlation for this retail outlet, and the fact that it was reported to be used weekly on average in Greece ($M=3.31$) and between weekly and fortnightly in the UK ($M=3.47$), while in Lithuania and the Netherlands it was reportedly used monthly ($M=4.97$ and $M=5.01$ respectively) (cf. Table 5.6.1.1.1).

In addition, overall, young adults recalled more frequent ($M=3.24$) e-cigarette advertising in small stores than adults ($M=3.40$) ($t(2496)=-5.55$, $p<0.001$). However, this cannot be explained by the use and recall correlation, as there was no significant difference between young adults and adults in terms of the mean use frequency of the retail outlet ($t(2657)=-1.21$, $p>0.05$, cf. Table 5.6.1.1.1).

Moreover, across all countries e-cigarette users recalled e-cigarette advertising more frequently ($M=2.87$) than non-users ($M=3.38$) ($t(354)=8.43$, $p<0.001$).

Reported recall of e-cigarette advertising in petrol / gas stations

As shown in table 5.6.1.1.4, people surveyed recalled e-cigarette advertising in petrol / gas stations on average either very rarely or never ($M=3.40$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the retail outlet. Indeed, the mean calculated with only the 4,507 people surveyed who reported using the retail outlet was $M=3.26$, indicating that, on average, those who used this retail outlet very rarely recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this retail outlet differed by country ($F(10, 5515)=18.78$, $p < 0.001$). The mean frequencies of reported recall were $M=3.15$ in Poland and $M=3.18$ in Spain, therefore it was very rarely recalled on average in these countries. However, the mean frequencies in Lithuania and Denmark were $M=3.64$ and $M=3.61$ respectively, indicating that it was either very rarely or never seen in these countries. This can be partly explained by the use and recall correlation for this retail outlet, and the fact that it was reported to be used fortnightly on average in Poland and Spain ($M=4.04$ and $M=4.10$ respectively), while in Lithuania it was reportedly used monthly ($M=4.74$) and between fortnightly and monthly in Denmark ($M=4.46$) (cf. Table 5.6.1.1.1).

In addition, overall, young adults recalled more frequent ($M=3.23$) e-cigarette advertising in petrol / gas stations than adults ($M=3.46$) ($t(2361)=-7.85$, $p < 0.001$). However, this cannot be explained by the use and recall correlation, as there was no significant difference between young adults and adults in terms of the mean use frequency of the retail outlet ($t(2512)=1.74$, $p > 0.05$, cf. Table 5.6.1.1.1).

Moreover, across all countries e-cigarette users recalled e-cigarette advertising more frequently ($M=3.04$) than non-users ($M=3.42$) ($t(357)=6.53$, $p < 0.001$).

Reported recall of e-cigarette advertising in cafés / restaurants

As shown in table 5.6.1.1.4, people surveyed recalled e-cigarette advertising in cafés / restaurants on average either very rarely or never ($M=3.50$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the retail outlet. Indeed, the mean calculated with only the 4,713 people surveyed who reported using the retail outlet was $M=3.41$, indicating that, on average, those who used this retail outlet also either very rarely or never recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this retail outlet differed by country ($F(10, 5515)=18.14$, $p < 0.001$). The mean frequencies of reported recall were $M=3.23$ in Spain and $M=3.33$ in Greece, therefore e-cigarette advertising was reportedly very rarely recalled on average in these countries. However, the mean frequency in the Netherlands was $M=3.72$, and it was $M=3.68$ in both Denmark and Lithuania, indicating that e-cigarette advertising was almost never recalled in these countries on average. This can be partly explained by the use and recall correlation for this retail outlet, and the fact that it was reportedly used weekly on average in Spain ($M=3.20$) and between weekly and fortnightly in Greece ($M=3.62$), while in the Netherlands, Denmark and Lithuania it was reportedly used less than monthly ($M=5.90$, $M=5.95$ and $M=5.87$ respectively) (cf. Table 5.6.1.1.1).

In addition, overall, young adults recalled more frequent ($M=3.37$) e-cigarette advertising in cafés / restaurants than adults ($M=3.54$) ($t(2377)=-6.32$, $p < 0.001$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the retail outlet on a fortnightly basis ($M=4.00$) while adults reported using it significantly less ($M=4.38$) on average ($t(2695)=-6.67$, $p < 0.001$, cf. Table 5.6.1.1.1).

Moreover, across all countries e-cigarette users recalled e-cigarette advertising more frequently ($M=3.15$) than non-users ($M=3.52$) ($t(352)= 6.33$, $p < 0.001$).

Reported recall of e-cigarette advertising in specialised alcohol retailers (e.g. off-licences)

As shown in table 5.6.1.1.4, people surveyed recalled e-cigarette advertising in specialised alcohol retailers on average either very rarely or never ($M=3.49$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the retail outlet. Indeed, the mean calculated with only the 3,329 people surveyed who reported using the retail outlet was $M=3.16$, indicating that, on average, those who used this retail outlet very rarely recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this retail outlet differed by country ($F(10, 5515)= 30.98$, $p < 0.001$). The mean frequency of reported recall was $M=3.10$ in Poland, therefore e-cigarette advertising in this retail outlet was on average very rarely recalled in this country. However, the mean frequencies in the Netherlands, Denmark and Lithuania were $M=3.76$, $M=3.71$ and $M=3.70$ respectively, indicating that e-cigarette advertising was almost never recalled in these countries on average. This can be partly explained by the use and recall correlation for this retail outlet, and the fact that it was reportedly used between fortnightly and monthly on average in Poland ($M=4.45$), while in the Netherlands, Denmark and Lithuania it was reportedly used less than monthly ($M=5.90$, $M=5.95$ and $M=5.87$ respectively) (cf. Table 5.6.1.1.1).

In addition, overall, young adults recalled more frequent ($M=3.36$) e-cigarette advertising in specialised alcohol retailers from another country than adults ($M= 3.54$) ($t(2370)= -6.20$, $p < 0.001$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the retail outlet on a monthly basis ($M=5.19$) while adults reported using it significantly less ($M=5.52$, i.e. between monthly and less than monthly) on average ($t(2435)= -5.69$, $p < 0.001$, cf. Table 5.6.1.1.1).

Moreover, across all countries e-cigarette users recalled e-cigarette advertising more frequently ($M=3.06$) than non-users ($M=3.52$) ($t(352)= 7.70$, $p < 0.001$).

Reported recall of e-cigarette advertising in specialised tobacconists

As shown in table 5.6.1.1.4, people surveyed recalled e-cigarette advertising in specialised tobacconists on average very rarely ($M=3.34$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the retail outlet. Indeed, the mean calculated with only the 2,721 people surveyed who reported using the retail outlet was $M=2.66$, indicating that, on average, those who used this retail outlet either occasionally or very rarely recalled e-cigarette advertising.

The frequency of recall e-cigarette advertising in this retail outlet differed by country ($F(10, 5515)= 42.77$, $p < 0.001$). The mean frequency of reported recall was $M=2.85$ in Spain, therefore e-cigarette advertising was very rarely recalled on average. However, the mean frequency in Lithuania was $M=3.78$, indicating that e-cigarette advertising was almost never recalled. This can be partly explained by the use and recall correlation for this retail outlet, and the fact that it was reported to be used fortnightly on average in Spain ($M=4.38$), while in Lithuania it was reportedly used between less than monthly and never ($M=6.57$) (cf. Table 5.6.1.1.1).

In addition, overall, young adults recalled more frequent ($M=3.29$) e-cigarette advertising in specialised tobacconists than adults ($M=3.36$) ($t(2583) = -2.26$, $p < 0.05$). However, this cannot be explained by the use and recall correlation, as there was no significant difference between young adults and adults in terms of the mean use frequency of the retail outlet ($t(2620) = -1.42$, $p > 0.05$, cf. Table 5.6.1.1.1).

Moreover, across all countries e-cigarette users recalled e-cigarette advertising more frequently ($M=2.70$) than non-users ($M=3.38$) ($t(354) = 10.23$, $p < 0.001$).

Reported recall of e-cigarette advertising in specialised e-cigarette shops

As shown in table 5.6.1.1.4, people surveyed recalled e-cigarette advertising in specialised e-cigarette shops on average either very rarely or never ($M=3.41$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the retail outlet. Indeed, the mean calculated with only the 1,885 people surveyed who reported using the retail outlet was $M=2.26$, indicating that, on average, those who used this retail outlet occasionally recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this retail outlet differed by country ($F(10, 5515) = 48.78$, $p < 0.001$). The mean frequency of reported recall was $M=2.92$ in Greece, therefore advertising was very rarely recalled on average in this country. However, the mean frequencies in Lithuania and the Netherlands were $M=3.85$ and $M=3.80$ respectively, indicating that e-cigarette advertising was almost never recalled in these countries. This can be partly explained by the use and recall correlation for this retail outlet, and the fact that it was reported to be used monthly on average in Greece ($M=5.30$), while in Lithuania and the Netherlands it was reportedly almost never used ($M=6.71$ and $M=6.65$ respectively) (cf. Table 5.6.1.1.1).

In addition, overall, young adults recalled more frequent ($M=3.31$) e-cigarette advertising in specialised e-cigarette shops than adults ($M=3.44$) ($t(2479) = -4.21$, $p < 0.001$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the retail outlet over less than monthly ($M=5.80$) while adults reported using it significantly less ($M=6.08$, i.e. less than monthly) on average ($t(2444) = -5.08$, $p < 0.001$, cf. Table 5.6.1.1.1).

Moreover, across all countries e-cigarette users recalled e-cigarette advertising more frequently ($M=2.34$) than non-users ($M=3.47$) ($t(353) = 16.66$, $p < 0.001$).

Reported recall of e-cigarette advertising in tobacco vending machines

As shown in table 5.6.1.1.4, people surveyed recalled e-cigarette advertising in tobacco vending machines on average either very rarely or never ($M=3.62$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the retail outlet. Indeed, the mean calculated with only the 1,857 people surveyed who reported using the retail outlet was $M=2.86$, indicating that, on average, those who used this retail outlet very rarely recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this retail outlet differed by country ($F(10, 5515) = 20.85$, $p < 0.001$). The mean frequency of reported recall was $M=3.27$ in Spain, therefore advertising was very rarely recalled on average. However, the mean frequencies in Lithuania and the

Netherlands were $M=3.87$ and $M=3.82$, indicating that e-cigarette advertising was almost never recalled in these countries.⁵⁰ This can be partly explained by the use and recall correlation for this retail outlet, and the fact that it was reportedly used monthly on average in Spain ($M=4.79$), while in Lithuania it was reportedly almost never used ($M=6.73$), and in the Netherlands it was used between less than monthly and never ($M=6.42$) (cf. Table 5.6.1.1.1).

In addition, overall, young adults recalled more frequent ($M=3.50$) e-cigarette advertising in tobacco vending machines than adults ($M=3.66$) ($t(2296) = -5.68$, $p < 0.001$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the retail outlet over less than monthly ($M=5.73$) while adults reported using it significantly less ($M=6.07$, i.e. less than monthly) on average ($t(2383) = -6.05$, $p < 0.001$, cf. Table 5.6.1.1.1).

Moreover, across all countries e-cigarette users recalled e-cigarette advertising more frequently ($M=3.17$) than non-users ($M=3.64$) ($t(346) = 7.54$, $p < 0.001$).

Reported recall of e-cigarette advertising in outdoor kiosks, mobile shops/vans, or street markets

As shown in table 5.6.1.1.4, people surveyed recalled e-cigarette advertising in outdoor kiosks, mobile shops/vans, or street markets on average either very rarely or never ($M=3.44$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the retail outlet. Indeed, the mean calculated with only the 3,709 people surveyed who reported using the retail outlet was $M=3.16$, indicating that, on average, those who used this retail outlet very rarely recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this retail outlet differed by country ($F(10, 5515) = 26.84$, $p < 0.001$). The mean frequencies of reported recall were $M=3.15$ in Greece and $M=3.20$ in Spain, therefore advertising was very rarely recalled on average in these countries. However, the mean frequencies in the Netherlands and Lithuania were both $M=3.70$, and the mean frequency in Denmark was $M=3.66$, indicating that e-cigarette advertising was almost never recalled in these countries. This can be partly explained by the use and recall correlation for this retail outlet, and the fact that it was reported to be used fortnightly on average in Greece ($M=3.70$), as well as between fortnightly and monthly in Spain ($M=4.45$), while in the Netherlands, Denmark and Lithuania it was reportedly used less than monthly ($M=5.77$, $M=5.73$ and $M=5.77$ respectively) (cf. Table 5.6.1.1.1).

In addition, overall, young adults recalled more frequent ($M=3.30$) e-cigarette advertising in outdoor kiosks, mobile shops/vans, or street markets than adults ($M=3.49$) ($t(2349) = -6.42$, $p < 0.001$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the retail outlet more than monthly ($M=4.85$) while adults reported using it significantly less ($M=5.14$, i.e. monthly) on average ($t(2550) = -4.84$, $p < 0.001$, cf. Table 5.6.1.1.1).

Moreover, across all countries e-cigarette users recalled e-cigarette advertising more frequently ($M=3.04$) than non-users ($M=3.47$) ($t(352) = 6.98$, $p < 0.001$).

Tobacco vending is banned in Bulgaria, Cyprus, Estonia, Finland, France, Greece, Hungary, Latvia, Lithuania, Romania, Slovakia, Slovenia and the UK. As with any survey work, there is a risk that reported recall in the citizens' survey may lead to overstatement because recall can be more a measure of salience than of actual advertising activity, and people's memories do not necessarily keep within the 12-month timeframe indicated in the survey questionnaire. It may be for these reasons that recall was reported in countries without TVMs⁵⁰

Reported recall of e-cigarette advertising in pharmacies

As shown in table 5.6.1.1.4, people surveyed recalled e-cigarette advertising in pharmacies on average either very rarely or never ($M=3.51$). It is important to note that the whole sample (5,526 individuals) was taken into account in these means, not only the individuals who reported using the retail outlet. Indeed, the mean calculated with only the 3,709 people surveyed who reported using the retail outlet was $M=3.43$, indicating that, on average, those who used this retail outlet also either very rarely or never recalled e-cigarette advertising.

The frequency of recall of e-cigarette advertising in this retail outlet differed by country ($F(10, 5515)=26.41, p< 0.001$). The mean frequencies of reported recall were $M=3.23$ in Spain, $M=3.25$ in Greece and $M=3.28$ in the UK, therefore advertising was very rarely recalled on average in these countries. However, the mean frequencies in Lithuania and the Netherlands were $M=3.80$ and $M=3.74$ respectively, indicating that e-cigarette advertising was almost never recalled in these countries. This can be partly explained by the use and recall correlation for this retail outlet, and the fact that it was reported to be used between fortnightly and monthly on average in Spain, Greece and the UK ($M=4.44, M=4.41$ and $M=4.43$ respectively), while in Lithuania it was reportedly used between monthly and less than monthly ($M=5.21$) and in the Netherlands it was reportedly used less than monthly ($M=5.67$) (cf. Table 5.6.1.1.1).

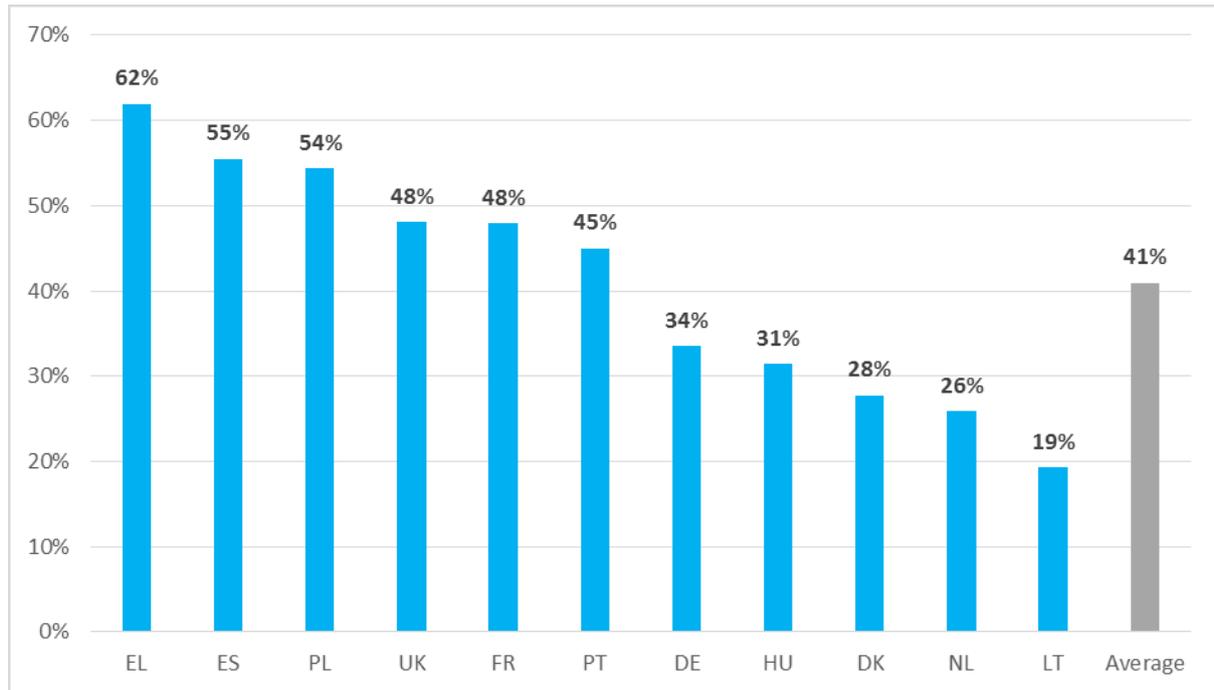
In addition, overall, young adults recalled more frequent ($M=3.37$) e-cigarette advertising in pharmacies than adults ($M=3.56$) ($t(2343)= -6.85, p< 0.001$). This can be partly explained by the use and recall correlation, and the fact that young adults reported using the retail outlet more than monthly ($M=4.85$) while adults reported using it significantly less ($M=5.14$, i.e. monthly) on average ($t(2550)= -4.84, p< 0.001$, cf. Table 5.6.1.1.1).

Moreover, across all countries e-cigarette users recalled e-cigarette advertising more frequently ($M=3.10$) than non-users ($M=3.54$) ($t(349)= 7.24, p< 0.001$).

5.6.1.1.5 REPORTED RECALL OF E-CIGARETTE ADVERTISING IN AT LEAST ONE RETAIL OUTLET

The figure below (5.6.1.1.5) shows the percentage of respondents per country who reported to recall e-cigarette advertising at least occasionally in at least one retail outlet out of all people surveyed.

Figure 5.6.1.1.5: Reported recall of any form of e-cigarette advertising in at least one retail outlet (% share of respondents who said often or occasionally for at least one retail outlet, per country)



The chart shows the percentage of people in each country who responded “Often” or “Occasionally” for recall in at least one type of retail outlet. The types of retail outlets enquired about were: large stores (e.g. supermarket), small stores (e.g. convenience stores, newsagents), petrol / gas stations, cafés / restaurants, specialised alcohol retailers (e.g. off-licences), specialised tobacconists, specialised e-cigarette shop, tobacco vending machines, outdoor kiosks, mobile shops/vans, or street markets, and pharmacies. All 5,526 individuals surveyed were taken into account in these values, not only the ones who reported using the retail outlets.

Figure 5.6.1.1.5 represents the percentage of people surveyed who reported to have “often” or “occasionally” recalled e-cigarette advertising in at least one type of retail outlet. These percentage rates for reported recall of e-cigarette advertising differed by country ($\chi^2(10)= 409.0, p< 0.001$).

Overall, more than two-fifths (41%) reported recall of e-cigarette advertising in at least one type of retail outlet. 62% of respondents in Greece, 55% in Spain and 54% in Poland reported recall of e-cigarette advertising in at least one type of retail outlet. However, in Denmark, the Netherlands and Lithuania the reported recall rates were 28%, 26% and 19% respectively.

Although reported recall of e-cigarette advertising across retail outlets was not frequent, on average at least one person out of five in all countries reported to recall seeing it either often or occasionally in at least one type of retail outlet.

5.6.1.2 RECALL OF TOBACCO AND E-CIGARETTE FREE SAMPLES, FREE GIFTS AND PROMOTIONAL ITEMS

In the survey, 5,526 individuals from eleven EU countries were asked how frequently they recalled seeing tobacco and e-cigarette free samples, gifts and promotional items. Responses were recorded separately for tobacco advertising and e-cigarette products on a five point scale: 'Often', 'Occasionally', 'Very rarely', 'Never' (ranked from 1 to 4) or 'Don't know'.

The tables in the following section present the mean values for the frequencies of recalling tobacco as well as recalling e-cigarette free samples, gifts and promotional items.

5.6.1.2.1 RECALL OF TOBACCO FREE SAMPLES, GIFTS AND PROMOTIONAL ITEMS

The following section presents the reported recall of free tobacco samples, gifts and promotional items. It should be noted that out of the 5,526 people surveyed, only those who did not respond "don't know" were taken into account in the analysis. Therefore, the following means were calculated on the basis of 4,950 responses.

Table (5.6.1.2.1) displays the reported recall of free tobacco samples, gifts and promotional items by country.

Table 5.6.1.2.1: Reported recall of tobacco free samples, gifts and promotional items by Member State

	Total sample (4950)	Age				Member State									
		Young adults (15-24) (1308)	Adults (25+) (3642)	DE (469)	DK (480)	EL (475)	ES (463)	FR (469)	HU (449)	LT (357)	NL (445)	PL (434)	PT (440)	UK (469)	
Samples, free gifts and promotional items	3.50	3.41	3.53***	3.43	3.81	2.82	2.95	3.55	3.60	3.80	3.80	3.58	3.70	3.54###	

Mean score (0.00): 1= 'Often' ; 2= 'Occasionally' ; 3= 'Very rarely' ; 4= 'Never'

Base number (xxxx): number of people surveyed in the sample considered

t-tests for differences by age: * p<0.05; ** p<0.01; *** p<0.001

ANOVA's for differences by country: # p<0.05; ## p<0.01; ### p<0.001. Significant results indicate that not all countries are equal.

As show in table 5.6.1.2.1, people surveyed reported recalling tobacco free samples, gifts and promotional items on average either “very rarely” or “never” with a mean frequency of recall of $M=3.50$.

The frequency of recall of tobacco free samples, gifts and promotional items differed by country ($F(10, 4939)= 78.38, p< 0.001$). The mean frequencies of reported recall were $M=2.82$ in Greece and $M=2.95$ in Spain, therefore it was very rarely recalled on average in these countries. However, the mean frequency in Denmark was $M=3.81$, and $M=3.80$ in both Lithuania and the Netherlands, indicating that it was almost never seen in these countries.

In addition, overall, young adults (15 to 24 years old) recalled more frequent ($M=3.41$) tobacco free samples, gifts and promotional items than adults (over 25) ($M= 3.53$) ($t(2080)= -3.99, p< 0.001$ (cf. Table 5.6.1.2.1)).

Moreover, across all countries smokers recalled tobacco free samples, gifts and promotional items more frequently ($M=3.34$) than non-smokers ($M=3.59$) ($t(3298)= 9.71, p< 0.001$).

5.6.1.2.2 RECALL OF E-CIGARETTE FREE SAMPLES, GIFTS AND PROMOTIONAL ITEMS

The following section presents the reported recall of e-cigarette free samples, gifts and promotional items. It should be noted that out of the 5,526 people surveyed, only those who did not respond “don’t know” were taken into account in the analysis. Therefore, the following means were calculated on the basis of 4,958 responses.

Table (5.6.1.2.2) displays the reported recall of e-cigarette free samples, gifts and promotional items by country.

Table 5.6.1.2.2: Reported recall of e-cigarette free samples, gifts and promotional items by Member State

	Total sample (4958)	Age				Member State									
		Young adults (15-24) (1297)	Adults (25+) (3661)	DE (467)	DK (480)	EL (468)	ES (457)	FR (465)	HU (456)	LT (370)	NL (448)	PL (444)	PT (441)	UK (462)	
Samples, free gifts and promotional items	3.67	3.59	3.70***	3.70	3.85	3.57	3.34	3.63	3.73	3.87	3.76	3.68	3.77	3.56###	

Mean score (0.00): 1= 'Often' ; 2= 'Occasionally' ; 3= 'Very rarely' ; 4= 'Never'

Base number (xxxx): number of people surveyed in the sample considered

t-tests for differences by age: * p<0.05; ** p<0.01; *** p<0.001

ANOVA's for differences by country: # p<0.05; ## p<0.01; ### p<0.001. Significant results indicate that not all countries are equal.

As show in table 5.6.1.2.2, people surveyed reported recalling e-cigarette free samples, gifts and promotional items on average almost never with a mean frequency of recall of $M=3.67$.

The frequency of recall of e-cigarette free samples, gifts and promotional items differed by country ($F(10, 4947)= 19.66, p< 0.001$). The mean frequency of reported recall was $M=3.34$ in Spain, therefore it was very rarely recalled on average in this country. However, the mean frequencies in Denmark and Lithuania were $M=3.85$ and $M=3.87$ respectively, indicating that it was almost never seen in these countries.

In addition, overall, young adults (15 to 24 years old) recalled more frequent ($M=3.59$) e-cigarette free samples, gifts and promotional items than adults (over 25) ($M= 3.70$) ($t(2020)= -4.45, p< 0.001$ (cf. Table 5.6.1.2.2)).

Moreover, across all countries e-cigarette users recalled e-cigarette free samples, gifts and promotional items more frequently ($M=3.30$) than non-users ($M=3.70$) ($t(325)= 6.84, p< 0.001$).

5.6.2 KEY INFORMANTS' SURVEY

Findings from the key informants' survey are presented in two sections: Product displays and advertising at point of sale, and free samples, gifts and competitions/prize draws.

Product displays and advertising at point of sale

Tobacco

A number of questions were asked in the key informants' survey to assess citizens' potential exposure to tobacco products and tobacco advertising at point of sale (POS).

First of all, key informants were asked to visit a range of retail outlets to establish which types of retail outlets sold tobacco products in their country (Table 5.6.2.1). Where informants indicated uncertainty, further email contact was made with the Informant and with other experts in the same country to try to establish the most accurate response. However, it should be emphasised that the responses were based on expert judgement, and may not have captured the full picture of tobacco retailing across the countries.

Table 5.6.2.1: Which types of retail outlet sell tobacco products

Type of retail outlet	BUL	DEN	FRA	GER	GRE	HUN	LITH	NETH	POL	SPA	UK
Supermarket	Y	Y	N	Y	N	N	Y	Y	Y	N	Y
Convenience store/mini-mart	Y	Y	N	Y	Y	N	Y	Y	Y	Y	Y
Petrol/gas station	Y	Y	Y	Y	Y	N	Y	Y	Y	Y	Y
Newsagent/confectionery store	Y	N	N	Y	Y	N	Y	Y	Y	N	Y
Off-licence/liquor store/alcohol store	Y	Y	N	Y	N	N	N*	N	Y	N	Y
Tobacconist	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Cafe/bar	Y	Y	Y	Y	N	N	Y	Y	N	Y	Y
Fast food/take away shop & restaurant	N	N	N	Y	N	N	N	Y	N	Y	Y
Vending machine	N	Y	N	Y	N	N	N	Y	N	Y	N
Outdoor kiosk/mobile shop or van	Y	N	N	Y	Y	Y	Y	Y	Y	Y	Y
Street market	Y	N	N	N	N	N	N	N	N	N	N**

Data source: Key informants' survey

* The informant noted that tobacco is sold only in a limited number of alcohol stores in Lithuania

** Illicit tobacco products are sometimes sold at street markets in the UK

The table shows that there was considerable variation in where tobacco products were reported as being sold across the 11 member states.

Hungary was reported to have the narrowest range of outlets: only nationally supervised tobacco stores have been allowed to sell tobacco products since legislation was passed on 1st July 2013 controlling the number and type of outlets permitted to sell tobacco (<http://www.euromonitor.com/tobacco-in-hungary/report>). In contrast, Germany was reported to have the widest range of outlets, with tobacco reported as being sold through all but one of the outlet categories.

Bulgaria, Netherlands and the UK were also reported to have relatively high coverage, with tobacco reported as being sold in all but two of the outlets on the list for each country.

Informants were then asked a series of questions to assess how prominently tobacco products were displayed and advertised at point of sale in each of the outlets which were reported to sell them. Where informants indicated uncertainty, further email contact was made with the informant and with other experts in the same country to try to establish the most accurate response. For each outlet which was reported to sell tobacco products, informants were asked how frequently in their view:

- products were hidden from customer view or on open view;
- products were displayed in purpose-designed cabinets or storage units (such units tend to be designed to display the product to best effect, and sometimes contain lighting or other features to make particular brands stand out);
- products were positioned next to confectionery displays (this was asked because confectionery is typically very visible in retail outlets and is often next to the till; placing products next to confectionery also increases the likelihood that children and young people will see them);
- advertising for products was seen on the outside of the premises (for example, in the window or on the outside signage);
- advertising for products was seen on tobacco gantries or shelves;
- vendors asked customers if they wanted to buy the product.

Questions were adapted where appropriate for different types of retail outlet. For example, questions relating to vending machines included whether there were images of products on the outside of the machine and if there were age controls on the machine. For specialist tobacconist retail outlets, responses to the final question, 'Do vendors ask customers if they want to buy the product' were excluded, as the question was felt to be redundant in an outlet dedicated to tobacco products. As with the responses on tobacco retailing, it should be emphasised that the responses are based on expert judgement, and may not have captured the full picture of point of sale display and advertising across the countries.

Responses were then coded numerically and summed to give a POS display and advertising score for each outlet category in each country, and for overall display and advertising in each country. By calculating tertiles, scores were converted to three bands 'high', 'medium', 'low' (including no display or advertising) (Table 5.6.2.2). It should be noted that the survey was conducted in the UK a few weeks before a ban on the display of tobacco products in all retail outlets came into force in April 2015, and the ratings for the UK reflected the situation before the implementation of this legislation.

Table 5.6.2.2: Experts' assessment of tobacco exposure at POS in different retail outlets

	BUL	DEN	FRA	GER	GRE	HUN	LITH	NETH	POL	SPA	UK
Supermarkets	Med	Med	Low	High	Low	Low	Med	Med	Med	Low	Med
Convenience premises/Mini-marts	Med	Med	Low	Med	High	Low	Med	Med	High	Med	Med
Petrol Stations/Gas Stations	High	Med	Low	High	Med	Low	Med	Med	Low	Med	Med
Cafés/Bars	Med	Med	Med	Med	Low	Low	Med	Med	Low	Med	Med
Off-Licences/Liquor Stores/Alcohol Stores	High	Med	Low	Med	Low	Low	Low	Low	Med	Low	Med
Fast Food/Take-away Food Shops & Restaurants	Low	Low	Low	Med	Low	Low	Low	Med	Low	Med	Low
Newsagents/Confectionery/Candy Stores	Med	Low	Low	High	Med	Low	Med	High	High	Low	Med
Tobacconists (main sale of tobacco products/accessories)	Med	Med	High	High	Med	Med	Med	High	High	Med	High
Self-service Vending Machines	Low	Low	Low	High	Low	Low	Low	Med	Low	High	Low
Outdoor Kiosks or Mobile Shops/Vans	High	Low	Low	High	High	Med	Med	Med	Med	Med	Low
Street Markets	Med	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
Other*	Low	Low	Med	Low	Low	Low	Low	Med	Low	Low	Low
OVERALL RETAIL EXPOSURE	High	Med	Low	High	Med	Low	Med	Med	Med	Med	Med

Data source: Key informants' survey

*Other types of outlet identified by informants included certain categories of restaurant in France and 'drug stores' (pharmacy-like stores which sell non-prescription health products and beauty product) in the Netherlands.

Based on key informants' assessments of the prominence of tobacco product displays and advertising at point of sale, two countries, Bulgaria and Germany, were rated as high overall, while France and Hungary were rated low, with the remaining countries rated as medium. The UK's situation has changed since the survey was conducted, with the implementation in April 2015 of a ban on display of tobacco products in all retail outlets. Although all products are now in principle hidden in the UK (for example, behind shutters or flaps), tobacco storage units are still in prominent positions in many retail outlets and are clearly labelled as selling tobacco. Consumers are therefore still exposed to cues that tobacco is for sale.

Unsurprisingly, the types of retail outlets with highest prominence of tobacco product displays and advertising were tobacconists, followed by newsagents, petrol stations, convenience stores and supermarkets. Fast-food/take-away outlets, cafes and bars, and alcohol stores in general had lower prominence of displays and advertising, and street markets had particularly low prominence (rated 'low' in all countries apart from Bulgaria). Exposure in outdoor kiosks and mobile shops/vans was more variable, reflecting the different formats of these outlet types in different countries. Vending machines are not permitted in most countries (hence a 'low' rating for most countries), although in two of the countries where they are permitted they were rated as 'high' in prominence because of their tendency to be sited in locations which were visible and accessible to young people.

E-cigarettes

Key informants were asked which types of retail outlets sold e-cigarette products in their country (Table 5.6.2.3).

The key informants reported some uncertainty regarding where e-cigarettes were sold, perhaps reflecting the fact that e-cigarettes are an evolving market with as yet little consistency in where and how products are sold and displayed. In order to supplement the information supplied by key informants, an additional sample of 20 e-cigarette users (vapers) was recruited via social media by one member of the research team, and these vapers were asked the same questions as key informants. Responses were then collated and compared, and the consensus response entered into the table below. Where there was still uncertainty or inconsistency in responses, a 'not sure' response was entered into the table. As with the responses on tobacco retailing in the previous section, it should be emphasised that the responses were based on the experiences and judgement of those surveyed in each country, and may not have captured the full picture of e-cigarette retailing across the countries. It should also be emphasised that the e-cigarette market is constantly changing in response to consumer trends, national policies and anticipated legislation, and that these changes may affect e-cigarette retailing practices.

Table 5.6.2.3: Which types of retail outlet sell e-cigarettes

Type of retail outlet	BUL	DEN	FRA	GER	GRE	HUN	LITH	NETH	POL	SPA	UK
Supermarket	N	Y	N	Y	N	Y	Y	Y	Y	N	Y
Convenience store/mini-mart	N	Y	N	Y	Y	Y	N	Y	Y	N	Y
Petrol/gas station	Y	Y	N	Y	N	N	Unsure	Y	Y	N	Y
Cafe/bar	N	N	Unsure	Unsure	N	N	N	N	N	N	Unsure
Off-licence/liquor store/alcohol store	Y	N	N	Unsure	N	N	N	N	Y	N	Y
Fast food/take away shop & restaurant	N	N	N	N	N	N	N	N	N	N	N
Newsagent/ confectionery store	N	Y	Unsure	Y	Y	N	N	Y	Y	Y	Y
Pharmacy	N	Y	N	Unsure	Y	N	N	Unsure	N	Y	Y
Specialist e-cigarette shop	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Vending machine	N	N	N	Unsure	N	N	N	N	N	N	N
Outdoor kiosk and mobile shop/van	N	N	N	Unsure	Y	Y	N	N	Unsure	Unsure	Y
Street market	N	Unsure	N	N	N	N	N	Y	Unsure	N	Y
Other	N	Online	Tobacco-nists	Outdoor events/ festivals, tobacconists	N	N	Online, classified ads	Tobacco-nists, online	Online	No response	Online

Data source: Key informants' survey

All key informants or vapers noted the presence of specialist e-cigarette shops in their country. E-cigarettes were also fairly commonly reported as being sold in supermarkets, convenience stores, newsagents and petrol/gas stations.

The informants for France, Bulgaria and Lithuania reported few types of outlets selling e-cigarettes, while the UK reported the highest number of outlet types in which e-cigarettes were sold.

In the 'other' category, several informants drew attention to the selling of e-cigarettes online and through tobacconists.

Because of the difficulty in establishing which types of retail outlet sold e-cigarettes in each country, it was not possible to collect reliable information regarding the prominence of point of sale displays and advertising of e-cigarettes within each type of retail outlet. However, from the information supplied to us by informants, the UK, Poland and Germany appeared to have more visible point of sale display and advertising of e-cigarettes in general. Once the e-cigarette market has stabilised, it may be possible to take more reliable measures of how e-cigarettes are displayed and advertised in retail settings.

Free samples, gifts and competitions/prize draws

Key informants were asked whether three types of promotion ever took place in their country:

- Distribution of free samples and trial offer products by tobacco and e-cigarette manufacturers and retailers
- Distribution of free gifts linked to products (for example, branded merchandise) associated with tobacco and e-cigarette brands
- Competitions or prize draws run by tobacco and e-cigarette manufacturers and retailers.

Tobacco

Responses are presented in Table 5.6.2.4 for tobacco.

Table 5.6.2.4: Promotions linked to tobacco in member states: free samples/offers, free gifts, competitions and prize draws

	BUL	DEN	FRA	GER	GRE	HUN	LITH	NETH	POL	SPA	UK
Do manufacturers give out free samples or provide offers to send away for free trial products in your country for cigarettes and tobacco related products?											
	Y	N	N	Y	Y	N	N	N	Y	N	N
Do shopkeepers ever give out free gifts when people buy cigarettes or tobacco-products, or can people redeem free gifts for saving coupons or tokens in your country for these products?											
	N	N	N	N	N	N	N	N	Y	Y	N
Do manufacturers run any competitions and prize draws in your country for cigarettes and tobacco related products?											
	Not Sure	N	N	Y	N	N	N	N	N	N	Not Sure

Data source: Key informants' survey

In general, informants' responses indicated that there was only limited activity of this type in the countries surveyed. A small number of examples of free samples, trial product offers and free gifts being distributed were reported in a small number of countries, and competitions and prize draws were mentioned as definitely having occurred only in Germany. Examples provided by informants are described below.

Free sample products and trial offers of tobacco products

An example was provided by the informant for Bulgaria of a street promotion which had involved characters dressed up as a king and possibly as Marilyn Monroe giving out cigarettes in the street to passers-by.⁵¹ Other examples mentioned by informants appeared to be restricted to existing users of

⁵¹ http://www.frognews.bg/news_10165/Moshtna_promotsionalna_kampania_na_novi_tsigari/

products or to those registered with a website. In Germany, the informant stated that they were aware of free samples of cigarettes or vouchers for free cigarettes, for redemption at tobacco shops or gas stations, being sent via direct mail. These free offers appeared to be limited to customers whose addresses had been obtained during promotional activities at festivals, through online-registration on age-restricted tobacco producer websites, or through 'tell-a-friend' activities. The informant also noted that free packs of cigarettes and tickets to music festivals could be won by registering with one tobacco brand website.⁵² Access to the site was not possible from outside Germany.

The informant for Greece stated that they were aware of a promotion outside selected kiosks and other venues involving offers of free trial products for smokers. The informant noted that it was very difficult for non-smokers to get access to such promotions. The informant for Poland indicated that nightclub hostesses might offer free cigarettes and cigarette packs to customers if they filled in a short questionnaire for marketing purposes. No published or online sources were available to confirm these examples.

Free gifts when cigarettes or tobacco products are purchased

Most informants indicated that these were not offered in their country. The Netherlands informant stated that occasional instances had been found of small free gifts such as lighters being given out by tobacco representatives in specialist tobacco shops, but that this was not a regular occurrence.⁵³

A report supplied by the informant for Poland outlined several examples of free gift distribution at entertainment and sports events in Poland between 2011 and 2012 [87]. Because tobacco companies were not allowed within the legal framework at the time to sponsor events, these promotions were carried out under the auspices of public relations or advertising companies rather than tobacco companies themselves, although the free gifts were all linked to the purchase of particular tobacco brands. During the UEFA Euro 2012 Football Championships, a media company had an exhibitors' stall in the Krakow Fanzone at which customers could receive free lighters and watches as a reward for purchasing a particular brand of cigarettes. Branding was prominent on the stand, and it was subsequently judged to have violated the law prohibiting sponsorship. Another promotion for the same cigarette brand was described in the same report, at a Heineken-sponsored music festival in July 2012, in which free lighters and carousel ride tickets were given out when customers bought cigarettes from the brand sales outlet. The report also reports that Japan Tobacco International used an advertising-agency stall at the OFF music festival in August 2012 to promote a brand of cigarettes. Free gifts of a classic lighter or an 8GB pen-drive were distributed to customers who bought five packets of cigarettes.

Competitions and prize draws for cigarettes or tobacco products

Most informants stated that competitions or prize draws for cigarettes or tobacco products did not take place in their country. The UK informant noted that competitions and prize draws for retailers (but not for consumers) of tobacco products were known to take place, in which prizes could include a supply of cigarettes.

Several examples were given by the informant in Germany, most of them on tobacco brand websites which users could only access after registration. One online promotion in February 2015 invited

⁵² www.pallmall.de

⁵³ <http://www.tabaknee.nl/nieuws/nieuws/33-nieuws/533-hoe-word-ik-een-marlboro-meisje-de-geraffineerde-marketing-van-philip-morris>; <http://www.klacht.nl/camel-nieuwe-sigaretten-plus-gratis-aansteker/>

entrants to upload a creative photograph of themselves and enter their personal details (to be used for marketing purposes), in return for the chance to win a new pack⁵⁴. Another promotion on the same website, again accessible only to registered website users, was targeted specifically at students and offered the opportunity to win a 'sponsored party' for 100 people with free beer, wine, cigarettes and decoration material. One website offered a prize draw in which, in return for providing a mobile phone number, entrants could win a holiday to New York, Las Vegas or Tokyo.⁵⁵ The draw was only accessible to users who had registered and received brand advertising containing a link to the homepage.

Another online competition/prize draw was found on the German website of a leading manufacturer of smoking accessories.⁵⁶ The website is accessible to anyone, and offers different prize draws throughout the year. A prize draw in February 2015 offered one year's free supply of rolling paper. In return, entrants supplied their personal details and allowed the company to use their data for marketing purposes. The same manufacturer also offered free music festival tickets for people who registered with the website, including a prize of two tickets for the Glastonbury Festival including flights, camping and spending money.

⁵⁴ www.gauloises.de

⁵⁵ <https://for-deciders.de/>

⁵⁶ www.gizeh-online.de

E-cigarettes

Table 5.6.2.5 shows the informants' responses to questions regarding free samples, gifts and competitions/prize draws for e-cigarettes.

Table 5.6.2.5: Promotions for e-cigarettes in member states: free samples/offers, free gifts, competitions and prize draws

	BUL	DEN	FRA	GER	GRE	HUN	LITH	NETH	POL	SPA	UK
Do manufacturers give out free samples or provide offers to send away for free trial products in your country for e-cigarettes and related products?											
	Not Sure	Y	Y	N	N	Not Sure	Not Sure	Y	Not Sure	Y	Y
Do shopkeepers ever give out free gifts when people buy e-cigarettes and related products, or can people redeem free gifts for saving coupons or tokens in your country for these products?											
	Y	Y	Y	Not Sure	N	Y	Not Sure	Y	Not Sure	Y	N
Do manufacturers run any competitions and prize draws in your country for e-cigarettes and related products?											
	Y	Y	Not Sure	Y	N	Y	Y	Y	Not Sure	Y	Y

Data source: Key informants' survey

Overall, more promotional activity was reported for e-cigarettes than for tobacco products across member states. This is unsurprising given the different legislative contexts for tobacco and e-cigarettes. Examples supplied by informants are described below.

Free sample products and trial offers of e-cigarette products

Several informants indicated that e-cigarette free samples/trial offer products were distributed or available in their country.⁵⁷ In Germany, the informant commented that e-cigarette advertising was limited in general, but noted that an outdoor advertisement for one brand offered a free trial pack to any adult (applicants had to pay the postage costs themselves)⁵⁸. Another e-cigarette brand website in Germany promoted a Mother's Day 2015 offer of a second free kit with every kit purchased.⁵⁹

The Spanish informant noted that free trials were sometimes offered to wholesalers as well as to end consumers.⁶⁰ The UK informant noted that many e-cigarette companies offered free trials or provided free products, but that such trials were often accompanied by a subsequent charge on a debit or credit card if the trial was not cancelled by the user. The informant noted that free trials were primarily offered in connection with e-cigarettes sold online, and were mostly offered by smaller suppliers of less well known brands and new products.

The informant for Denmark gave an example, reported in a local newspaper, of free e-cigarettes being distributed at an agricultural college to students who wished to stop smoking.⁶¹ The age of the pupils at the college was 16-20, and it was reported that the Principal and 63 of the smoking pupils accepted. Also in Denmark, an e-cigarette company sent free samples of nicotine-containing e-cigarettes, liquid and a charger to a popular 16-year old blogger and suggested some text which he could write on his Facebook profile about e-cigarettes.⁶² The company also made an offer whereby consumers who entered the blogger's name as a purchase code when buying e-cigarettes online could receive a discount.

Free gifts when e-cigarettes are purchased

Several informants gave examples of free gifts being given out by e-cigarette manufacturers or suppliers. These were usually directly connected to the product, such as additional bottles of vaping fluid or e-cigarette refills, given out either online or in specialist shops.⁶³ The informant for the Netherlands mentioned that mouth filters were offered as free gifts on some online retailers' websites.

In the UK, examples were found of branded merchandise (e.g. umbrellas, baseball caps) being shown being worn by promotional reps in trade press stories, but no examples were found of such merchandise being given away free to consumers. An example was found of promotional gift items such as calendars and gift cards being offered for sale (but not for free) on an e-cigarette sales website.⁶⁴

The informant for Lithuania noted that websites which sold e-cigs would sometimes provide free delivery; this was also mentioned in Hungary and Spain.^{eg.65} Finally, the informant for Hungary mentioned point collection schemes and discount coupons for e-cigarette purchases, but did not

⁵⁷ <https://da-dk.facebook.com/RygestopFaaEnGratisECigaret/>; <http://e-cigaretet.xsmoke.dk/>;
http://www.smokingnova.com/actie/nl.php?transaction_id=10224e4a4b304f2bad62c854809420;
<http://www.xsmoke.com/dk>

⁵⁸ https://www.beposh.net/?ao_confirm

⁵⁹ <http://www.greensmoke.de/>

⁶⁰ <http://spanish.alibaba.com/product-gs/supporting-wholesale-igo-4m-dual-coils-electronic-cigarette-free-sample-free-shipping-1918790048.html?s=p>

⁶¹ Nordjyske Stifttidende (local newspaper), Dec 1 2014

⁶² <http://www.dr.dk/Nyheder/Penge/2014/05/20/160803.htm>

⁶³ <http://www.puresmoke.nl/proefpakket-vod-hergebruik-e-sigaret.html>

⁶⁴ <http://www.totallywicked-eliquld.co.uk/products/discounts-and-offers/gift-cards-products.html>

⁶⁵ <http://www.esmokingspain.es/cigarrillos-cigarrillos-electronicos-cigarrillo-electrnico-volish-crystal-doble-p-16.html>

provide specific brand or retailer examples. No examples of free gifts were given by the informant for Denmark.

Competitions and prize draws for e-cigarettes or related products

Examples were given from several countries of online competitions and draws in which entrants could win e-cigarette products or other prizes. Facebook competitions and games, in which users could win e-cigarette products in return for 'liking', 'sharing', 'commenting' or playing simple word games were mentioned in Hungary, Germany, the UK and Lithuania.

One e-cigarette brand offered on its German website a 'fine silver pendant' as the prize in a raffle open to all customers who placed orders between 6th and 10th of March 2014, and a Christmas promotion in which participants could open virtual advent calendar windows to win prizes, including a snowboard and a camera.⁶⁶ A Bulgarian e-cigarette brand website was similarly found to offer regular prize draws and raffles.⁶⁷

One e-cigarette retailer in the Netherlands promoted its involvement in a 'Ladies' Day and Night' (a shopping event aimed at women, at which prizes of holidays in Europe could be won.⁶⁸ Also in the Netherlands, a coupon offer was found from an e-cigarette producer to the value of 50 euros to be spent on the brand's e-cigarette products.⁶⁹

Examples were also given of competitions at outdoor events. In the Netherlands, various newspapers reported on the fact that young children could win (nicotine free) e-cigarettes (shisha pens) at outdoor fairs by playing darts.⁷⁰ Examples were also given in the Netherlands of prize draws targeted at older people, such as one at a fair for those aged 50 years and over in which the prize was 'one year of free vaping'.⁷¹

5.6.3 SUMMARY AND SYNTHESIS

Citizens' awareness and recall

Advertising for tobacco and e-cigarettes in retail outlets was reportedly very rarely seen on average across all countries surveyed. Young people tended to recall seeing it more frequently than people over 25. Advertising in retail outlets was also recalled more frequently by smokers and e-cigarette users than by non-smokers and non-users.

When asked if they recalled seeing tobacco advertising at least occasionally in at least one type of retail outlet, 50% of respondents did so, while the equivalent percentage was 41% for e-cigarettes. A strong use and recall correlation was observed in all the retail outlets considered, except for large stores.

⁶⁶ <http://blog.greensmoke.de/tag/gewinnspiel/>

⁶⁷ <http://innovationbg.com/>

⁶⁸ <https://www.facebook.com/Onderbest>

⁶⁹ <https://www.facebook.com/dedamphoek>

⁷⁰ <http://www.telegraaf.nl/binnenland/23202238/Shisha-pen-tussen-de-teddyberen.html>;

<http://www.omroepbrabant.nl/news/212140342/8-jarigen+darten+voor+e-sigaret+en+zakmes+op+kermis+in+Den+Dungen.aspx>

⁷¹ http://www.prijsvragen.nl/prijsvragen.php?prijsvraag_id=50122&frame=1

On the whole, tobacco and e-cigarette samples, free gifts and promotional items were either very rarely or never recalled. Smokers and e-cigarette users tended to recall more of such activities than people who did not use the products, which may be partly due to successful targeting and increased attention among smokers / e-cigarette users to products which are already relevant to them.

Young people tended to have higher recall of tobacco and e-cigarette samples, free gifts and promotional items. Again, this may be due to successful targeting or it could be that younger people are more receptive to this type of promotion.

Key informants' survey

Point of sale

Key informants were asked to identify which types of retail outlets (from a list of 11) sold tobacco and e-cigarette products in their country. It should be emphasised that the responses were based on informants' judgement, and may not have captured the full picture of tobacco and e-cigarette retailing across the countries.

There was considerable variation in where tobacco products were reported as being sold across the Member States. Hungary was reported to have the narrowest range of outlets: only nationally supervised tobacco stores have been allowed to sell tobacco products since legislation in 2013 controlling the number and type of outlets permitted to sell tobacco. Germany was reported to have the widest range of outlets, with tobacco reported as being sold through all but one of the outlet categories. Bulgaria, Netherlands and the UK were also reported to have relatively high coverage, with tobacco reported as being sold in all but two of the outlets on the list for each country.

The key informants reported some uncertainty regarding where e-cigarettes were sold, perhaps reflecting the fact that e-cigarettes are an evolving market with as yet little consistency in where and how products are sold and displayed. Even the vapers we contacted in order to supplement the expert key informant responses did not provide consistent answers in all countries on e-cigarette retail availability. However, for some categories of outlet we can be confident as there was a clear pattern. So, for example all informants noted the presence of specialist e-cigarette shops in their country. E-cigarettes were also fairly commonly reported as being sold in supermarkets, convenience stores, newsagents and petrol/gas stations. The informants for France, Bulgaria and Lithuania reported few types of outlets selling e-cigarettes, while the UK reported the highest number of outlet types in which e-cigarettes were sold. Several informants also drew attention to the selling of e-cigarettes online and through tobacconists.

Informants were asked a series of questions to assess how prominently tobacco products were displayed and advertised at point of sale in each of the outlets which were reported to sell them. Responses were then coded numerically and summed to give a tobacco POS display and advertising score for each outlet category in each country, and for overall tobacco display and advertising in each country. Based on key informants' assessments of the prominence of tobacco product displays and advertising at point of sale, two countries, Bulgaria and Germany, were rated as high overall, while France and Hungary were rated low, with the remaining countries rated as medium. The survey was conducted in the UK a few weeks before a ban on the display of tobacco products in all retail outlets came into force in April 2015, and the ratings for the UK reflected the situation before the implementation of this legislation.

The types of retail outlets with highest prominence of tobacco product displays and advertising were tobacconists, followed by newsagents, petrol stations, convenience stores and supermarkets. Fast-food/take-away outlets, cafes and bars, and alcohol stores in general had lower prominence of tobacco displays and advertising, and street markets had particularly low prominence in all countries apart from Bulgaria. Tobacco prominence in outdoor kiosks and mobile shops/vans was more variable, reflecting the different formats of these outlet types in different countries. Tobacco vending machines are not permitted in most countries (hence a 'low' rating for most countries), although in two of the countries where they are permitted they were rated as 'high' in prominence because of their tendency to be sited in locations which were visible and accessible to young people.

Free samples, gifts and competitions/prize draws

Key informants were asked whether three types of promotion ever took place in their country:

- Distribution of free samples and trial offer products by tobacco and e-cigarette manufacturers and retailers
- Distribution of free gifts linked to products (for example, branded merchandise) associated with tobacco and e-cigarette brands
- Competitions or prize draws run by tobacco and e-cigarette manufacturers and retailers.

In general, informants' responses indicated that there was only limited activity of this type in relation to tobacco in the countries surveyed. A small number of examples of free tobacco product samples, trial product offers and free gifts being distributed were reported in a small number of countries, and tobacco-related competitions and prize draws were mentioned as definitely having occurred only in Germany.

Unsurprisingly, more promotional activity was reported for e-cigarettes than for tobacco products across Member States, with free samples and trial products reported as being distributed in five countries, free gifts reported as being offered in six countries, and competitions or prize draws mentioned in eight countries. Examples were provided of specific activities, for both tobacco and e-cigarettes, in several of the countries.

Synthesis

Tobacco advertising exposure

There was considerable variability reported by key informants in where tobacco products were sold in each of the countries examined in the key informants' survey, which in part reflects different regulations regarding where tobacco can be sold. Hungary was reported to have the narrowest range of retail outlets and Germany the widest. Overall, the types of retail outlets with highest prominence of tobacco product displays and advertising, according to information supplied by key informants, were tobacconists, followed by newsagents, petrol stations, convenience stores and supermarkets. Fast-food/take-away outlets, cafes and bars, and alcohol stores in general had lower prominence of tobacco displays and advertising, and street markets had particularly low prominence in all countries apart from Bulgaria. Tobacco prominence in outdoor kiosks and mobile shops/vans was more variable, reflecting the different formats of these outlet types in different countries. Vending machines were only reported in three countries, and these tended to be visible and accessible to young people. There was very little activity reported involving free tobacco samples, trial offers, free gifts and tobacco-related competitions and prize draws, with the exception of Germany for the latter.

In the citizens' survey, advertising for tobacco in retail outlets was reportedly very rarely seen on average across all countries surveyed, although when asked if they recalled seeing tobacco advertising at least occasionally in at least one type of retail outlet, 50% of respondents did so, which is unsurprising given that tobacco is sold in at least two types of retail outlet in every country. Young people tended to recall seeing it more frequently than people over 25, as did smokers compared with non-smokers. A strong use and recall correlation was observed in all the retail outlets considered (i.e. recall was related to how frequently people said they visited each type of retail outlet), except for large stores. Although there were some differences in reported recall between countries for some retail outlets, there did not appear to be a consistent pattern in these differences.

On the whole, tobacco samples, free gifts and promotional items were either very rarely or never recalled in the citizens' survey, which is consistent with the low level of activity reported in this area by the key informants. Young people tended to have higher recall of such activities than adults.

E-cigarette advertising exposure

The key informants reported some uncertainty regarding where e-cigarettes were sold, perhaps reflecting the fact that e-cigarettes are an evolving market with as yet little consistency in where and how products are sold and displayed. However, all informants noted the presence of specialist e-cigarette shops in their country and e-cigarettes were also fairly commonly reported as being sold in supermarkets, convenience stores, newsagents and petrol/gas stations. More promotional activity was reported for e-cigarettes than for tobacco products across Member States, with free samples and trial products reported as being distributed in five countries, free gifts reported as being offered in six countries, and competitions or prize draws mentioned in eight countries.

In the citizens' survey, advertising for e-cigarettes in retail outlets was reportedly very rarely seen on average across all countries surveyed, although when asked if they recalled seeing e-cigarette advertising at least occasionally in at least one type of retail outlet, 41% of respondents did so. Young people tended to recall seeing it more frequently than people over 25, as did e-cigarette users compared with non-users. A strong use and recall correlation was observed in all the retail outlets considered, except for large stores (i.e. recall was related to how frequently people said they visited each type of retail outlet).

On the whole, e-cigarette samples, free gifts and promotional items were either very rarely or never recalled in the citizens' survey – a similar level of recall to that for tobacco, despite there being more such activity in this area reported by key informants. The low recall may reflect the emerging nature of the e-cigarette market. Young people tended to have higher recall of such activities than adults.

5.7 WORK PACKAGE 7: SPONSORING, CORPORATE RESPONSIBILITY, BRAND STRETCHING AND IMITATION PRODUCTS

The aim of this work package was to examine events and corporate promotion, corporate sponsorship, corporate social responsibility (CSR), corporate entertaining by the tobacco and e-cigarette industry, brand stretching and imitation products, where information was available, in the countries chosen.

The main source of data on these promotional methods was the Citizens' Survey. However, some information was also found through the analysis of advertising spend data and the key informants' survey. This is summarised first, before the Citizens' Survey data.

5.7.1 INFORMATION FROM THE ANALYSIS OF ADVERTISING SPEND DATA

Data on sponsorship deals were not routinely collected by Kantar; however, Kantar did gather some ad hoc information, and this was passed on to us.

Tobacco

Kantar had no data on tobacco-related sponsorship deals. However, it should be noted that the print advertising purchased by tobacco companies (described in WP2) included advertising which could be defined as sponsorship and corporate social responsibility. As we note in WP2, the tobacco advertising found in publications aimed at the general public fell into the following categories:

- Messages relating to counterfeit and smuggled tobacco (e.g. an announcement about a 'technical conference' on the issue, a statement about toxic substances found in counterfeit tobacco)
- Professional recruitment ads (e.g. an advertisement for job opportunities for MBA students)
- Corporate social responsibility statements (e.g. a statement supporting good practice in tobacco growing)
- Sponsorship of cultural events

E-cigarettes

Kantar did not routinely monitor e-cigarette sponsorship deals, but did provide some data showing that 15 sports sponsorship deals took place in the UK in the period 2013-2014. These included venue, team and event sponsorship arrangements, for golf, motor racing, rugby union and football. There was no data on the value of the deals.

5.7.2 INFORMATION FROM THE KEY INFORMANTS' SURVEY

Key informants were asked questions about tobacco and e-cigarette promotion on social media (reported in WP3) and about free samples, free gifts and competitions and prize draws (reported in WP6). Some of the examples provided for those two work packages are also relevant here. In addition, key informants also forwarded reports and written descriptions of activities which are relevant to this work package. The information is summarised below.

Tobacco

A report supplied by the informant for Poland gave several examples of what could be seen as indirect tobacco sponsorship of entertainment and sports events in Poland between 2011 and 2012[87]. Because tobacco companies were not allowed within the legal framework at the time to sponsor events, these promotions were carried out under the auspices of public relations or advertising companies rather than tobacco companies themselves. During the UEFA Euro 2012 Football Championships, a media company had an exhibitors' stall in the Krakow Fanzone at which customers could receive free lighters and watches as a reward for purchasing a brand of cigarettes. Branding was prominent on the stand, and it was subsequently judged to have violated the law prohibiting sponsorship. Another promotion for the same brand was described in the same report, at a Heineken-sponsored music festival in July 2012, in which free lighters and carousel ride tickets were given out when customers bought cigarettes from the brand sales outlet. The report also reports that Japan Tobacco International used an advertising-agency stall at the OFF music festival in August 2012 to promote a brand's cigarettes. Free gifts of a classic lighter or an 8GB pen-drive were distributed to customers who bought five packets of cigarettes.

One tobacco brand had a highly visible presence at a music festival 'Rock am Ring', held in 2014 in Nürburg, Germany⁷². Images on the brand's website at the time showed a large 'hostel' constructed out of two freight containers branded with the tobacco product name, at which festival visitors (more than 60,000, from all over the world) were able to win prizes

The Danish key informant noted that they had been told by young people involved in organising music festivals that tobacco companies offered free cigarettes to festivals or offered financial sponsorship deals in return for agreements that only their brands of cigarette would be sold, and that flyers for tobacco products were handed out at festivals; however, no published source was provided to verify the information.

An arts initiative in Germany has been sponsored for several years by a tobacco company⁷³. The initiative comprises sponsored street art tours in several German cities, sponsored workshops and a website which features news and arts-related blogs. No mention is made of the tobacco brand on the website, although the arts initiative logo resembles the cigarette brand logo. The website has no access restrictions, and can be accessed from outside Germany⁷⁴.

⁷² www.pallmall.de

⁷³ www.placedelacreativite.de

⁷⁴ Confirming the connection between the brand and the initiative, mention is made on this artists' webpage (<http://cargocollective.com/maxgrunfeld/Clients-Info-Contact>) of a workshop having taking place in 2013 under the banner of the initiative "Place De La Creativité – Gauloise (cigarettes) Hannover, Germany – June 2013".

In relation to brand stretching, several informants noted that a clothing brand linked to a tobacco brand had stores in several EU countries and an international website⁷⁵ which stated in its English-language version that the brand “*has an ever growing consumer and retail platform: 45 countries, over 200 stores, 100’s of shop-within-shops or corners, key partners such as Galeries Lafayette, Coin, Printemps, Inno and new international showrooms in premium locations*”. The key informant for Denmark noted that the Danish version of the website described the brand as “strong and defined by values such as authenticity, nature and quality”. Although there were no references to tobacco brands on the clothing website, the imagery was consistent with themes associated with the tobacco brand, including visual and verbal references to the American west, the outdoors and a rugged masculine lifestyle.

E-cigarettes

Several examples were found in the analysis of social media conducted as part of WP3 of events sponsorship and branded merchandise by e-cigarette companies. These are described more fully in WP3, but included:

- branded merchandise (eg. calendars, gift cards) offered by a UK e-cigarette company
- e-cigarette companies having stalls at music festival, shopping and other events.

Some of the promotional activities described in WP6 could also be considered forms of sponsorship and CSR. For example, as outlined in the previous section, a Danish e-cigarette company sent free e-cigarettes to an agricultural college for students aged 16-20 stating that these were to help students to give up smoking [source: *Nordjyske Stifttidende (local newspaper), Dec 1 2014*].

The key informant for Spain noted that Spanish an e-cigarette company was the sponsor in 2010 and 2011 of a celebrity padel tennis competition to raise awareness and funds for breast cancer research⁷⁶. The event was described as having been attended by ‘tennis players, cyclists, and public figures’, and had included the opportunity to try the brand’s e-cigarette products.

5.7.3 CITIZENS’ SURVEY

5.7.3.1 RECALL OF TOBACCO AND E-CIGARETTE SPONSORED EVENTS

In the survey, 5,526 individuals from eleven EU countries were asked if they recalled seeing/attending/experiencing tobacco and e-cigarette sponsored events. A yes/no filter question was asked so as to determine if respondents had encountered these events in the last twelve months. If they had, they were then asked the frequency at which this occurred. These responses were recorded separately for tobacco sponsored events and e-cigarette sponsored events on a five point scale: ‘Often’, ‘Occasionally’, ‘Very rarely’, ‘Never’ (ranked from 1 to 4) or ‘Don’t know’.

Firstly, the charts in the following section display the percentage of people who responded yes to having encountered this type of tobacco and e-cigarette sponsored event in each country surveyed. Secondly, the tables in the section present the mean values for the frequencies of recalling tobacco and e-cigarette sponsored events.

⁷⁵ <http://www.mcs.com/eu/corporate/>

⁷⁶ <http://www.cigar-clean.es/index.php/en/media/43-segundo-torneo-benefico-de-padel.html>

5.7.3.1.1 RECALL OF TOBACCO SPONSORED EVENTS

The following section presents the reported recall of tobacco sponsored events.

Figure 5.7.3.1.1: Recall of tobacco sponsored events in the last 12 months by Member State

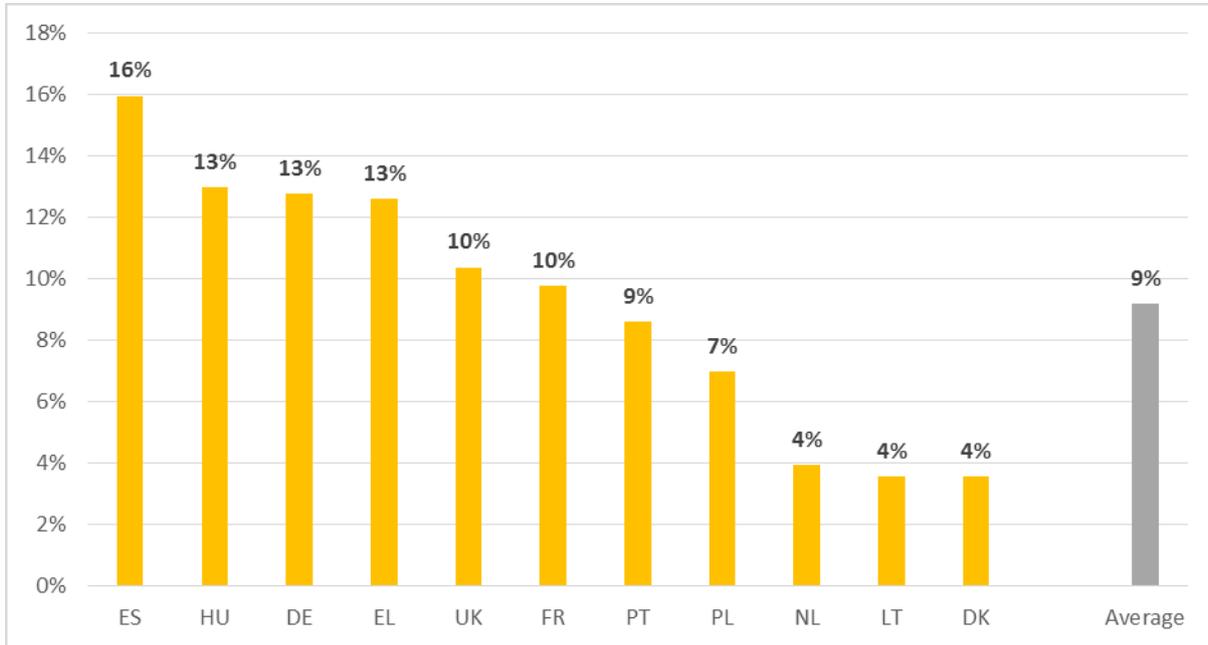


Chart shows the percentage of people surveyed who answered “Yes” to having recalled seeing/attending/experiencing tobacco sponsored events. The countries are sorted in descending order of that percentage. All individuals were taken into account in these values.

As displayed in Figure 5.7.3.1.1, overall reported recall was low. On average, across all countries, almost one in ten (9%) recalled having seen/attended/experienced tobacco sponsored events. Recall differed by country ($\chi^2(10)= 110.0, p< 0.001$). Recall ranged from 4% in the Netherlands, Lithuania and Denmark to 16% in Spain.

Table 5.7.3.1.1 below displays the frequency of recalling tobacco sponsored events.

It should be noted that out of the 5,526 people surveyed, those who responded “don’t know” were excluded from the analysis. Additionally, those who responded “no” to the filter question were coded as “never” recalling the events. Therefore, the following means were calculated on a base of 5,518 responses.

Table 5.7.3.1.1: Reported recall of tobacco sponsored events by Member State

	Total sample (5518)	Age				Member State									
		Young adults (15-24) (1483)	Adults (25+) (4035)	DE (500)	DK (503)	EL (507)	ES (501)	FR (501)	HU (499)	LT (501)	NL (506)	PL (501)	PT (500)	UK (499)	
Tobacco Sponsored Events	3.84	3.81	3.86**	3.78	3.95	3.79	3.71	3.83	3.80	3.93	3.94	3.88	3.85	3.81###	

Mean score (0.00): 1= 'Often' ; 2= 'Occasionally' ; 3= 'Very rarely' ; 4= 'Never'

Base number (xxxx): number of people surveyed in the sample considered, excluding those who answered "don't know"

t-tests for differences by age: * p<0.05; ** p<0.01; *** p<0.001

ANOVA's for differences by country: # p<0.05; ## p<0.01; ### p<0.001. Significant results indicate that not all countries are equal.

As shown in Table 5.7.3.1.1, people surveyed reported recalling tobacco sponsored events on average almost never, with a mean frequency of recall of M=3.84.

The frequency of recall of tobacco sponsored events differed by country ($F(10, 5507)= 9.60, p< 0.001$). However, in all countries surveyed, average recall approximated to almost never.

Overall, young adults (15 to 24 years old) recalled more frequent (M=3.81) tobacco sponsored events than adults (over 25) (M= 3.86) ($t(2382)= -2.72, p< 0.01$ (cf. Table 5.7.3.1.1)) and, across all countries, smokers recalled tobacco sponsored events more frequently (M=3.81) than non-smokers (M=3.86) ($t(3431)= 3.34, p< 0.001$).

5.7.3.1.2 RECALL OF E-CIGARETTE SPONSORED EVENTS

The following section presents the reported recall of e-cigarette sponsored events.

Figure 5.7.3.1.2: Recall of e-cigarette sponsored events in the last 12 months by Member State

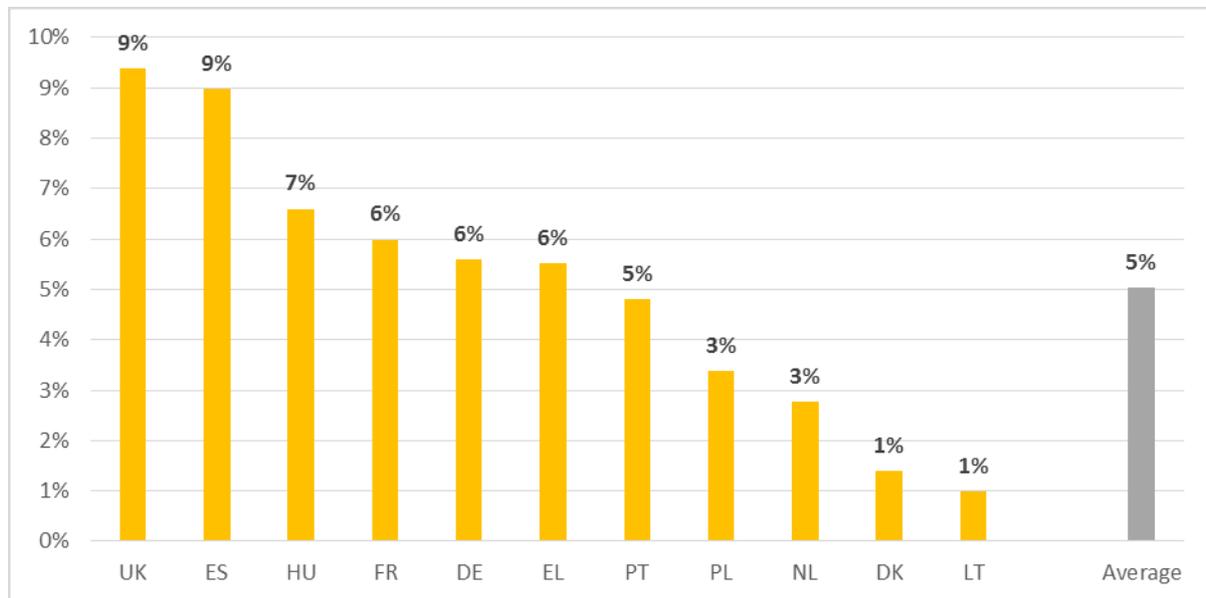


Chart shows the percentage of people surveyed who answered “Yes” to having recalled seeing/attending/experiencing e-cigarette sponsored events. The countries are sorted in descending order of that percentage. All individuals were taken into account in these values.

As displayed in Figure 5.7.3.1.2 overall reported recall was low with, on average, 5% having seen/attended/experienced e-cigarette sponsored events. Recall varied by country ($\chi^2(10)= 79.81, p< 0.001$), ranging from 1% in Denmark and Lithuania to 9% in the UK and Spain.

Table 5.7.3.1.2 below displays the frequency of recalling e-cigarette sponsored events.

It should be noted that out of the 5,526 people surveyed, those who responded “don’t know” were excluded from the following analysis. Additionally, those who responded “no” to the filter question were coded as “never” recalling the events. Therefore, the following means were calculated on a base of 5,520 responses.

Table 5.7.3.1.2: Reported recall of e-cigarette sponsored events by Member State

	Total sample (5520)	Age					Member State								
		Young adults (15-24) (1481)	Adults (25+) (4039)	DE (499)	DK (504)	EL (507)	ES (501)	FR (500)	HU (499)	LT (503)	NL (506)	PL (501)	PT (499)	UK (501)	
E-cigarette Sponsored Events	3.91	3.88	3.92**	3.90	3.97	3.90	3.82	3.89	3.91	3.98	3.95	3.93	3.92	3.84####	

Mean score (0.00): 1= 'Often' ; 2= 'Occasionally' ; 3= 'Very rarely' ; 4= 'Never'

Base number (xxxx): number of people surveyed in the sample considered

t-tests for differences by age: * p<0.05; ** p<0.01; *** p<0.001

ANOVA's for differences by country: # p<0.05; ## p<0.01; #### p<0.001. Significant results indicate that not all countries are equal.

As shown in Table 5.7.3.1.2, people surveyed reported recalling e-cigarette sponsored events on average almost never, with a mean frequency of recall of $M=3.91$.

The frequency of recall of e-cigarette sponsored events differed by country ($F(10, 5509)= 6.84, p< 0.001$). However, in all countries surveyed, average recall approximated to almost never.

Overall, young adults recalled more frequent ($M=3.88$) e-cigarette sponsored events than adults ($M= 3.92$) ($t(2299)= -2.74, p< 0.01$ (cf. Table 5.7.3.1.2)) and, across all countries, e-cigarette users recalled e-cigarette sponsored events more frequently ($M=3.76$) than non-users ($M=3.92$) ($t(336)= 3.83, p< 0.001$).

5.7.3.2 RECALL OF CORPORATE SOCIAL RESPONSIBILITY (CSR) INVOLVING TOBACCO AND E-CIGARETTE COMPANIES

In the survey, 5,526 individuals from eleven EU countries were asked if they recalled seeing/reading about/attending/experiencing corporate social responsibility (CSR) initiatives involving tobacco and e-cigarette companies. A yes/no filter question was asked so as to determine if respondents had encountered this in the last twelve months. If they had, they were then asked the frequency at which this occurred. These responses were recorded separately for tobacco and e-cigarette company initiatives on a five point scale: 'Often', 'Occasionally', 'Very rarely', 'Never' (ranked from 1 to 4) or 'Don't know'.

Firstly, the charts in the following section display the percentage of people who responded yes to having encountered CSR involving tobacco and e-cigarette companies in each country surveyed. Secondly, the tables in the following section present the mean values for the frequencies of recalling CSR involving tobacco as well as e-cigarette companies.

5.7.3.2.1 RECALL OF CSR INVOLVING TOBACCO COMPANIES

The following section presents the reported recall of CSR involving tobacco companies.

Figure 5.7.3.2.1: Recall of CSR involving tobacco companies in the last 12 months by Member State

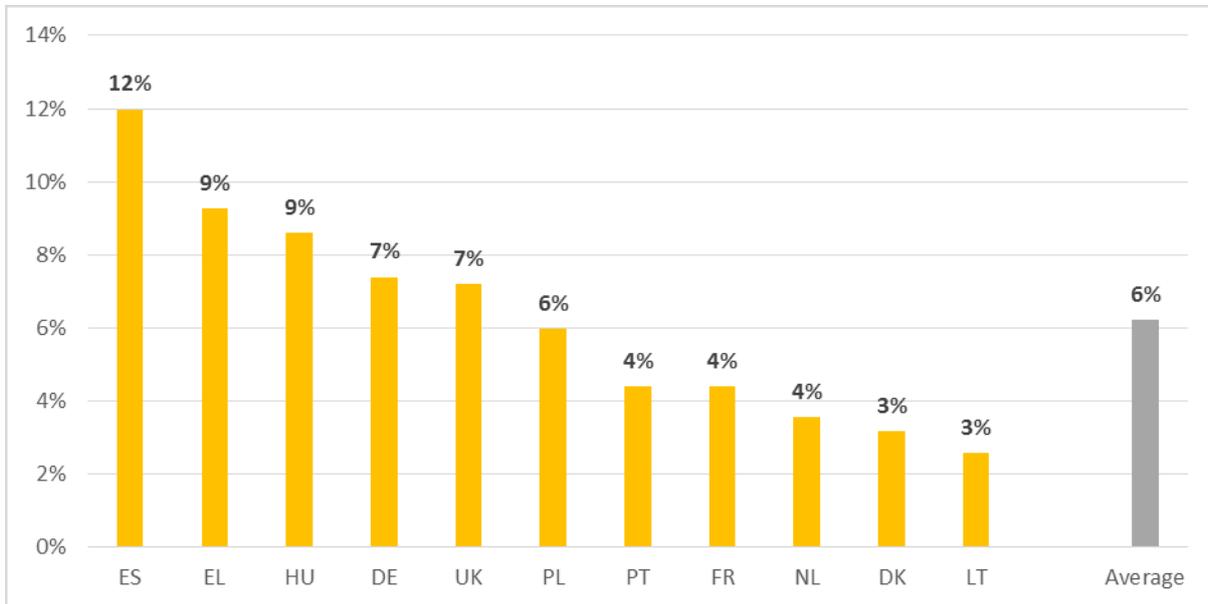


Chart shows the percentage of people surveyed who answered “Yes” to recalling seen/read about/attended/experienced corporate social responsibility initiatives involving tobacco companies. The countries are sorted in descending order of that percentage. All individuals were taken into account in these values.

Figure 5.7.3.2.1, indicates that overall reported recall was low. On average, 6% recalled having seen/read about/attended/experienced CSR initiatives involving tobacco companies. Recall differed by country ($\chi^2(10)= 74.63, p< 0.001$) ranging from 3% in Denmark and Lithuania to 12% in Spain.

Table 5.7.3.2.1 below displays the frequency of recalling CSR initiatives involving tobacco companies.

It should be noted that out of the 5,526 people surveyed, those who responded “don’t know” were excluded from the following analysis. Additionally, those who responded “no” to the filter question were coded as “never” recalling the events. Therefore, the following means were calculated on a base of 5,513 responses.

Table 5.7.3.2.1: Reported recall of CSR initiatives involving tobacco companies by Member State

	Total sample (5513)	Age				Member State									
		Young adults (15-24) (1480)	Adults (25+) (4033)	DE (501)	DK (503)	EL (505)	ES (499)	FR (501)	HU (496)	LT (501)	NL (504)	PL (502)	PT (500)	UK (501)	
CSR Involving Tobacco Companies	3.90	3.86	3.92***	3.85	3.95	3.86	3.81	3.94	3.86	3.97	3.95	3.90	3.92	3.89###	

Mean score (0.00): 1= 'Often' ; 2= 'Occasionally' ; 3= 'Very rarely' ; 4= 'Never'

Base number (xxxx): number of people surveyed in the sample considered

t-tests for differences by age: * p<0.05; ** p<0.01; *** p<0.001

ANOVA's for differences by country: # p<0.05; ## p<0.01; ### p<0.001. Significant results indicate that not all countries are equal.

As shown in Table 5.7.3.2.1, people surveyed reported recalling CSR initiatives involving tobacco companies on average almost never, with a mean frequency of recall of M=3.90.

The frequency of recall of CSR initiatives involving tobacco companies differed by country (F(10, 5502)= 6.55, p< 0.001). However, in all countries surveyed, average recall approximated to almost never.

Overall, young adults (15 to 24 years old) recalled more frequent (M=3.86) CSR initiatives involving tobacco companies than adults (over 25) (M= 3.92) (t(2223)= -3.55, p< 0.001 (cf. Table 5.7.3.2.1)) and, across all countries, smokers recalled CSR initiatives involving tobacco companies more frequently (M=3.76) than non-smokers (M=3.92) (t(3452)= 2.41, p< 0.05).

5.7.3.2.2 RECALL OF CSR INITIATIVES INVOLVING E-CIGARETTE COMPANIES

The following section presents the reported recall of CSR initiatives involving e-cigarette companies.

Figure 5.7.3.2.2: Recall of CSR initiatives involving e-cigarette companies in the last 12 months by Member State

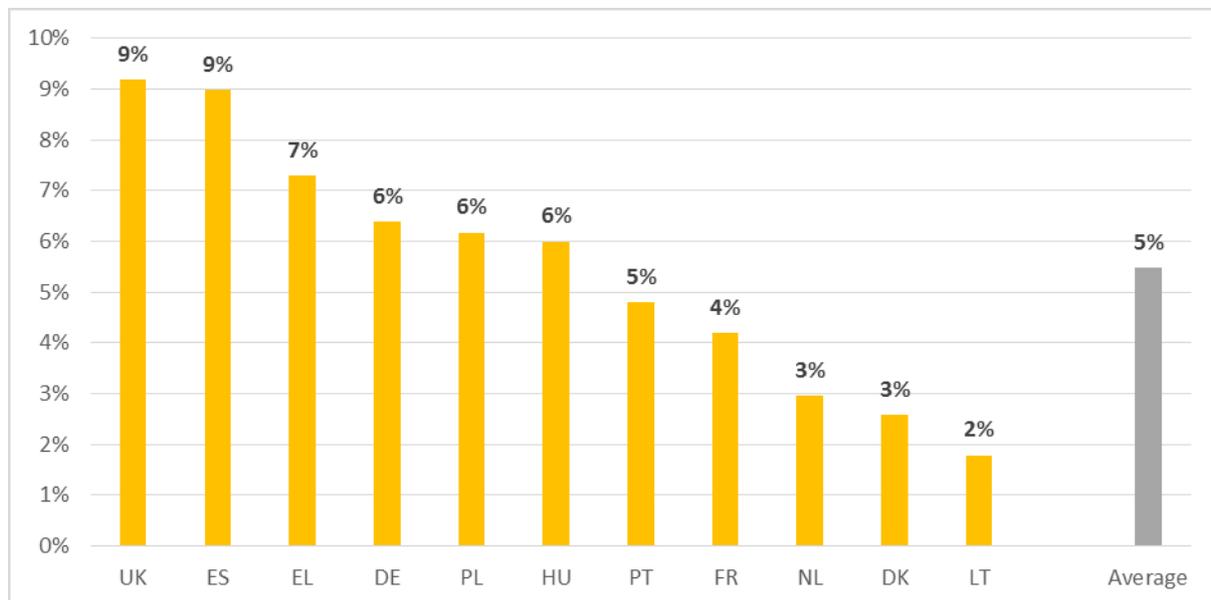


Chart shows the percentage of people surveyed who answered “Yes” to recalling seen/read about/attended/experienced corporate social responsibility initiatives involving e-cigarette companies. The countries are sorted in descending order of that percentage. All individuals were taken into account in these values.

As displayed in Figure 5.7.3.2.2, overall reported recall was low with, on average, 5% having seen/read about/attended/experienced CSR initiatives involving e-cigarette. Recall differed by country ($\chi^2(10)= 59.49, p< 0.001$) ranging from 2% in Lithuania to 9% in the UK and Spain.

Table 5.7.3.2.2 below displays the frequency of recalling CSR initiatives involving e-cigarette companies.

It should be noted that out of the 5,526 people surveyed, those who responded “don’t know” were excluded from the following analysis. Additionally, those who responded “no” to the filter question were coded as “never” recalling the events. Therefore, the following means were calculated on a base of 5,515 responses.

Table 5.7.3.2.2: Reported recall of CSR initiatives involving e-cigarette companies by Member State

	Total sample (5515)	Age		Member State										
		Young adults (15-24) (1483)	Adults (25+) (4032)	DE (500)	DK (504)	EL (506)	ES (500)	FR (501)	HU (498)	LT (501)	NL (505)	PL (499)	PT (500)	UK (501)
CSR Involving E-cigarette Companies	3.91	3.89	3.92	3.88	3.96	3.87	3.84	3.92	3.90	3.98	3.96	3.92	3.93	3.85 ^{###}

Mean score (0.00): 1= 'Often' ; 2= 'Occasionally' ; 3= 'Very rarely' ; 4= 'Never'

Base number (xxxx): number of people surveyed in the sample considered

t-tests for differences by age: * p<0.05; ** p<0.01; *** p<0.001

ANOVA's for differences by country: # p<0.05; ## p<0.01; ### p<0.001. Significant results indicate that not all countries are equal.

As shown in Table 5.7.3.2.2, people surveyed reported recalling CSR initiatives involving e-cigarette companies on average almost never, with a mean frequency of recall of M=3.91.

The frequency of recall of CSR initiatives involving e-cigarette companies differed by country (F(10, 5504)= 5.99, p< 0.001). However, in all countries surveyed, average recall approximated to almost never.

Overall, there was no significant difference between young adults and adults in terms of mean frequency of recall (t(2464)= -1.88, p> 0.05 (cf. Table 5.7.3.2.2)) and, across all countries, e-cigarette users recalled CSR initiatives involving e-cigarette companies more frequently (M=3.72) than non-users (M=3.92) (t(334)= 4.74, p< 0.001).

5.7.3.3 RECALL OF TOBACCO BRAND STRETCHING AND IMITATION PRODUCTS

In the survey, 5,526 individuals from eleven EU countries were asked if they recalled seeing/attending/experiencing tobacco companies marketing non-tobacco products. A yes/no filter question was asked so as to determine if respondents had encountered this in the last twelve months. If they had, they were then asked the frequency at which this occurred. These responses were recorded on a five point scale: ‘Often’, ‘Occasionally’, ‘Very rarely’, ‘Never’ (ranked from 1 to 4) or ‘Don’t know’.

Firstly, the charts in the following section display the percentage of people who responded yes to having encountered tobacco brand stretching and imitation products in each country surveyed. Secondly, the table in the following section presents the mean values for the frequencies of recalling tobacco companies marketing non-tobacco products.

Figure 5.7.3.3: Recall tobacco brand stretching and imitation products in the last 12 months by Member State

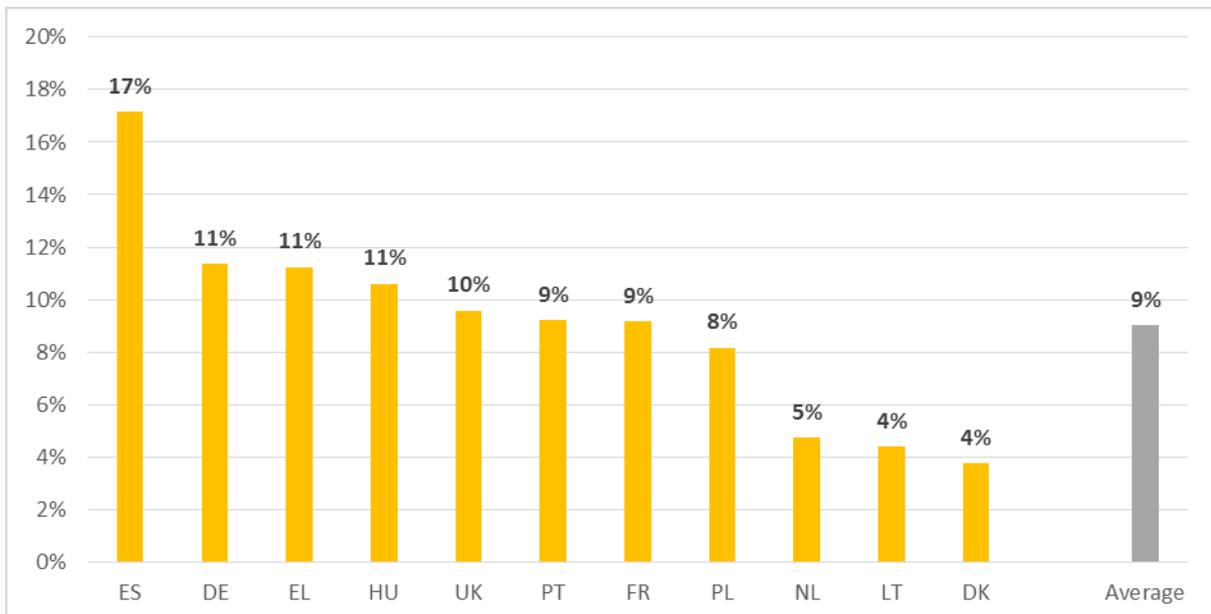


Chart shows the percentage of people who answered “yes” to having recalled seeing/attending/experiencing tobacco companies marketing non-tobacco products. The eleven countries surveyed are sorted in descending order of recall rate.

As displayed in Figure 5.7.3.3, overall reported recall was low, with an average of 9% having seen/attended/experienced tobacco companies marketing non-tobacco products.

Recall differed by country ($\chi^2(10) = 90.49$, $p < 0.001$) ranging from 4% in Lithuania to 17% in Spain.

Table 5.7.3.3 below displays the frequency of recalling tobacco brand stretching and imitation products.

It should be noted that out of the 5,526 people surveyed, those who responded “don’t know” were excluded from the following analysis. Additionally, those who responded “no” to the filter question were coded as “never” recalling the events. Therefore, the following means were calculated on a base of 5,513 responses.

Table 5.7.3.3: Reported recall of tobacco brand stretching and imitation products by Member State

	Total sample (5513)	Age		Member State										
		Young adults (15-24) (1481)	Adults (25+) (4032)	DE (501)	DK (503)	EL (506)	ES (501)	FR (499)	HU (497)	LT (501)	NL (506)	PL (501)	PT (498)	UK (500)
Brand Stretching and Imitation Products	3.85	3.80	3.87***	3.81	3.94	3.81	3.69	3.83	3.84	3.94	3.93	3.87	3.87	3.83####

Mean score (0.00): 1= 'Often' ; 2= 'Occasionally' ; 3= 'Very rarely' ; 4= 'Never'

Base number (xxxx): number of people surveyed in the sample considered

t-tests for differences by age: * p<0.05; ** p<0.01; *** p<0.001

ANOVA's for differences by country: # p<0.05; ## p<0.01; ### p<0.001. Significant results indicate that not all countries are equal.

As shown in Table 5.7.3.3, people surveyed reported recalling tobacco brand stretching and imitation products on average almost never, with a mean frequency of recall of $M=3.85$.

The frequency of recall of tobacco brand stretching and imitation products differed by country ($F(10, 5502)= 9.16, p< 0.001$). However, in all countries surveyed, average recall approximated to almost never.

Overall, young adults (15 to 24 years old) recalled more frequent ($M=3.80$) tobacco brand stretching and imitation products than adults (over 25) ($M= 3.87$) ($t(2357)= -3.67, p< 0.001$ (cf. Table 5.7.3.3)).

Moreover, across all countries smokers recalled tobacco brand stretching and imitation products more frequently ($M=3.80$) than non-smokers ($M=3.84$) ($t(3452)= 3.02, p< 0.01$).

5.7.4 SUMMARY AND SYNTHESIS

Advertising activity

Kantar had no data on tobacco-related sponsorship deals. However, it should be noted that the print advertising purchased by tobacco companies (described in WP2) included advertising which could be defined as sponsorship and corporate social responsibility. Kantar did not routinely monitor e-cigarette sponsorship deals, but did provide some data showing that 15 sports sponsorship deals took place in the UK in the period 2013-2014. These included venue, team and event sponsorship arrangements, for golf, motor racing, rugby union and football. There was no data on the value of the deals.

Key informants' survey

Key informants provided several examples of tobacco sponsorship. Several examples were provided of what could be seen as indirect tobacco sponsorship of music and sports events in Poland between 2011 and 2012. Typically they involved a stall or stand at an event at which tobacco products were sold and free gifts given out in return for purchasing cigarette packs. In Germany, one tobacco brand had a highly visible presence at an international music festival in 2014, with a 'hostel' constructed out of two freight containers, while another brand has sponsored an arts initiative (including a website) for several years.

Examples of e-cigarette sponsorship and CSR included e-cigarette companies having stalls at music festival, shopping and other events, a Danish e-cigarette company sending free e-cigarettes to students at an agricultural college, and sponsorship of a celebrity tennis competition in Spain to raise awareness and funds for breast cancer research.

Citizens' awareness and recall

Sponsorship

In the citizens' survey, respondents said they almost never recalled tobacco and e-cigarette sponsored events (9% tobacco sponsored events, 5% e-cigarette sponsored events). The level of recall for tobacco sponsored events ranged from 16% in Spain to 4% recall in Lithuania, Denmark and the Netherlands. The level of recall of e-cigarette sponsored events ranged from 9% of people in the UK and Spain to 1% in Denmark and Lithuania.

Corporate social responsibility

Similarly, respondents almost never recalled CSR initiatives, with overall recall rates of 6% for tobacco initiatives and 5% for e-cigarette initiatives. The level of recall for tobacco CSR initiatives ranged from 12% of people in Spain to 3% in Denmark and Lithuania. For e-cigarette initiatives, the level ranged from 9% in the UK and Spain to 2% in Lithuania.

Brand stretching and imitation products

Similarly, respondents almost never recalled tobacco brand stretching and imitation products, with overall recall rates of 9%. The level of recall ranged from 17% of people in Spain to 4% in Denmark and Lithuania.

Overall, while recall rates were low for all types of activity, there was a consistent pattern of higher awareness in Spain.

Synthesis

Tobacco advertising exposure

There is no routine monitoring by Kantar of tobacco sponsorship or the other activities examined in this work package. The key informants' survey reported some examples of sponsorship of music and sport events in a few countries. Citizens' awareness of sponsorship, CSR and brand stretching activities was generally low, although there was an overall trend of higher awareness of such activities in Spain. Because of the lack of robust data on spend on these activities, it is not possible to assess whether there is a relationship between the higher recall in Spain and actual activity.

E-cigarette advertising exposure

There is no routine monitoring by Kantar of e-cigarette sponsorship or the other activities examined in this work package. The key informants' survey reported some examples of sponsorship of music and sport events in a few countries. Citizens' awareness of sponsorship and CSR activities was generally low, although there was an overall trend of higher awareness of such activities in Spain. Because of the lack of robust data on spend on these activities, it is not possible to assess whether there is a relationship between the higher recall in Spain and actual activity.

5.8 WORK PACKAGE 8: CONCLUSIONS REGARDING THE KEY FORMS OF ADVERTISING, PROMOTING AND SPONSORSHIP TO WHICH EU CITIZENS ARE EXPOSED

We synthesise the findings from across the different research methods to draw overall conclusions about EU citizens' exposure to tobacco and e-cigarette advertising.

5.8.1 SUMMARY OF FINDINGS FROM WP2-7

Tobacco advertising exposure

Although surveys that measure the recollections of individuals must always be treated with caution, since memory is highly fallible, the levels of public recall in this survey of tobacco advertising in print, broadcasting, in retail outlets and through the internet, suggest that the public health objective of preventing tobacco advertising, promotion and sponsorship has not yet fully been met.

Print advertising purchased by tobacco companies was found in Greece, Spain, Lithuania and Poland. None of this was traditional advertising for tobacco products, but instead it comprised messages relating to counterfeit and smuggled tobacco, professional recruitment ads, corporate social responsibility (CSR) statements and sponsorship of cultural events. It is possible that this may have contributed to the reported recall of tobacco advertising in print media in the citizens' survey, where levels of recall tended to be higher in countries where this type of advertising had been placed.

While there was no evidence of paid advertising for tobacco on the **internet** in the Kantar data, some content was found which appeared to promote tobacco, such as prize draws, news items about tobacco retailing, and 'corporate' content, although these were limited. Citizens' recall levels tended to reflect this low level of activity, although it should be noted that internet advertising spend was not monitored in Greece, which had the highest level of reported recall in the citizens' survey.

Tobacco advertising spend was recorded in **outdoor** media in Bulgaria (where tobacco advertising formed 10% of all outdoor advertising) and in Germany. Citizens' recall of advertising outside the home was generally low, which is consistent with the overall low level of activity in this category. However, 79% of citizens in Greece and 62% in Germany recalled seeing tobacco advertising at least occasionally in at least one type of media outside the home. The recall level in Germany can be seen as reflecting the existence of outdoor tobacco advertising in that country. Bulgaria (where there was a relatively high level of outdoor tobacco advertising) was not included in the citizens' survey, and Kantar did not monitor outdoor advertising for Greece, and therefore we cannot comment on the relationship between spend and recall for those two countries.

The only tobacco-related advertising spend recorded in the Kantar data for **TV and radio** was a small amount of expenditure in Greece on radio advertising. There was no indication in the data of the nature of this advertising, and it could have comprised professional recruitment, corporate social responsibility statements, and statements about illicit tobacco or sponsorship of cultural events. Kantar did not hold information on product placement spend. The citizens' survey did not ask about recall of tobacco advertising on TV and radio, as it was assumed there would not be any, but 30% of citizens said that they recalled tobacco product placement at least occasionally in at least one of the six TV and radio media considered. Without specific information on product placement spend, it is not possible to assess whether this recall was related to actual activity.

There was considerable variability reported by key informants in which retail outlets sold tobacco products in each of the countries examined, which in part reflects different regulations. Hungary was reported to have the narrowest range of retail outlets and Germany the widest. Overall, the types of retail outlets with highest prominence of tobacco product displays and advertising, according to information supplied by key informants, were tobacconists, followed by newsagents, petrol stations, convenience stores and supermarkets. Fast-food/take-away outlets, cafes and bars, and alcohol stores in general had lower prominence of tobacco displays and advertising, and street markets had particularly low prominence in all countries apart from Bulgaria. Tobacco prominence in outdoor kiosks and mobile shops/vans was more variable, reflecting the different formats of these outlet types in different countries. Vending machines were only reported in two countries, and these tended to be visible and accessible to young people.

Citizens had low levels of recall of advertising for tobacco in retail outlets on average across all countries surveyed, although 50% recalled seeing tobacco advertising at least occasionally in at least one type of retail outlet, which is unsurprising given that tobacco is sold in at least two types of retail outlet in every country. Young people tended to recall seeing it more frequently than people over 25, and it should be noted that, with the possible exception of specialist tobacconists and off-licenses, all of the types of outlet are likely to be seen or used by large numbers of children and young people.

There was little evidence reported by key informants involving free tobacco **samples, trial offers, free gifts and tobacco-related competitions and prize draws**, although some activity was reported in Germany and, to a lesser extent, Bulgaria and Greece. Consistent with the low level of activity in most countries, the citizens' survey reported very low levels of recall of these types of activities. Young people tended to have higher recall of such activities than adults.

There is no routine monitoring by Kantar of tobacco **sponsorship**. The key informants' survey reported some examples of sponsorship in Poland and Germany of music and sport events which potentially have a cross-border reach because of their international audiences. Such promotional activities appear to have been carried out through public relations, advertising and marketing companies, rather than directly through the tobacco manufacturers. Citizens' awareness of sponsorship, CSR and brand stretching activities was generally low, although there was an overall trend of higher awareness of such activities in Spain. Because of the lack of robust data on spend on these activities, it is not possible to assess whether there is a relationship between the higher recall in Spain and actual activity.

The report provides some evidence of spending by tobacco manufacturers in Member States during 2013/14 on **corporate responsibility** advertising. This form of advertising could be considered an indirect means of promotion, through creating an image of the manufacturers as socially responsible, and in some cases indirectly promoting brands and corporate identity.

E-cigarette advertising exposure

E-cigarettes are now available across a wide range of outlets across the European Union. Outlets include specialist shops, as well as outlets such as supermarkets, convenience stores, newsagents and petrol stations.

The current extent of advertising, marketing and promotion of e-cigarettes varies very widely between Member States. There appears to be little or no such activity in some countries (for example, none is recorded in Bulgaria and Greece) while in other countries, such as the UK, France, Spain and

Denmark, e-cigarettes are widely advertised through print, internet, outdoor and TV and radio advertising.

There were generally low levels of recall of e-cigarette advertising across all media channels in the citizens' survey, which possibly reflects the emerging nature of this market. Young people tended to have higher recall of e-cigarette advertising than adults, in print media, on the internet and at point of sale, and also of free samples, trial products and competitions and prize draws. The overall low rate of recall may be partly a function of the promotional strategies being pursued by e-cigarette companies.

There was more advertising and brand-related content on social media for e-cigarettes than for tobacco products, which would be expected given that such advertising is legal in most Member States. E-cigarette producers and retailers have a considerable presence on Facebook and Twitter, including promotional material which is similar to the style of advertising that used to be favoured by tobacco advertisers, including glamorous imagery of models vaping, images of flavours, price promotions and others. Social media sites also included advocacy materials around e-cigarette regulations.

Conclusions

The evidence presented in this report suggests that, in general, tobacco advertising restrictions are well-enforced. There is little recorded advertising spend in traditional channels for tobacco in those areas where it is prohibited and citizens' recall of such activity is correspondingly low. There are however some gaps in the restrictions (outdoor advertising, CSR statements and sponsorship of local events), which means that citizens are still exposed to a certain level of tobacco marketing. In the absence of traditional advertising, product innovation including packaging also remains an important means to attract consumers.

The evidence presented in this report also suggests that the current extent of advertising, marketing and promotion of e-cigarettes varies very widely between Member States. There appears to be little or no such activity in some countries, while in others, e-cigarettes are widely advertised through print, internet, outdoor and TV and radio advertising. This situation should be monitored as the e-cigarette market matures and stricter regulation of e-cigarette marketing is put in place.

ANNEX 1: RELEVANT LEGISLATION AND TREATY OBLIGATIONS

European Union legislation

The **EU Directive on the advertising and sponsorship of tobacco products (2003/33/EC)** covers advertising that crosses national borders (such as press, radio or internet advertising) and sponsorship of sport, but does not apply to indirect advertising (brand-sharing) or advertising within member states (e.g. on billboards).

Relevant provisions of the Directive for this report include:

- Article 2(b) of the Tobacco Advertising Directive defines “advertising” as “any form of commercial communications with the aim or direct or indirect effect of promoting a tobacco product”.
- Article 3: Advertising in printed media and information society services
 - Advertising in the press and other printed publications shall be limited to publications intended exclusively for professionals in the tobacco trade and to publications which are printed and published in third countries, where those publications are not principally intended for the Community market. Other advertising in the press and other printed publications shall be prohibited.
 - Advertising that is not permitted in the press and other printed publications shall not be permitted in information society services.
- Article 4: Radio advertising and sponsorship
 - All forms of radio advertising for tobacco products shall be prohibited.
 - Radio programmes shall not be sponsored by undertakings whose principal activity is the manufacture or sale of tobacco products.
- Article 5: Sponsorship of events
 - Sponsorship of events or activities involving or taking place in several Member States or otherwise having cross border effects shall be prohibited.
 - Any free distribution of tobacco products in the context of the sponsorship of the events referred to in paragraph 1 having the purpose or the direct or indirect effect of promoting such products shall be prohibited.”

Tobacco advertising on television is banned in the EU by a separate Directive, the **Audiovisual Media Services Directive (2010/13/EU)** (formerly the Television without Frontiers Directive), which also prohibits the sponsorship of television programmes by tobacco companies.

The **Council Recommendation on the prevention of smoking and on initiatives to improve tobacco control (2003/54/EC)** recommended, inter alia, that Member States:

1. Adopt appropriate legislative and/or administrative measures to prohibit, in accordance with national constitutions or constitutional principles, the following forms of advertising and promotion:
 - the use of tobacco brand names on non-tobacco products or services,
 - the use of promotional items (ashtrays, lighters, parasols, etc.) and tobacco samples,
 - the use and communication of sales promotion, such as a discount, a free gift, a premium or an opportunity to participate in a promotional contest or game,
 - the use of billboards, posters and other indoor or outdoor advertising techniques (such as advertising on tobacco vending machines),
 - the use of advertising in cinemas, and
 - any other forms of advertising, sponsorship or practices directly or indirectly addressed to promote tobacco products;
2. Adopt appropriate measures, by introducing legislation or by other methods in accordance with national practices and conditions, in order to require manufacturers, importers and large-scale traders in tobacco products and in products and services bearing the same trademark as tobacco products to provide Member States with information concerning the expenditure they incur on advertising, marketing, sponsorship and promotion campaigns not prohibited under national or Community legislation.

International obligations and commitments

In February 2003, negotiations were concluded on the **World Health Organisation's Framework Convention on Tobacco Control**. The European Union collectively and all Member States individually are Parties. Specific Articles of the FCTC may be supplemented by Guidelines agreed through FCTC Conferences of the Parties.

Article 13 of the FCTC states that:

1. Parties recognize that a comprehensive ban on advertising, promotion and sponsorship would reduce the consumption of tobacco products.
2. Each Party shall, in accordance with its constitution or constitutional principles, undertake a comprehensive ban of all tobacco advertising, promotion and sponsorship. This shall include, subject to the legal environment and technical means available to that Party, a comprehensive ban on cross-border advertising, promotion and sponsorship originating from its territory. In this respect, within the period of five years after entry into force of this Convention for that Party, each Party shall undertake appropriate legislative, executive, administrative and/or other measures and report accordingly in conformity with Article 21.
3. A Party that is not in a position to undertake a comprehensive ban due to its constitution or constitutional principles shall apply restrictions on all tobacco advertising, promotion and sponsorship. This shall include, subject to the legal environment and technical means available to that Party, restrictions or a comprehensive ban on advertising, promotion and sponsorship originating from its territory with cross-border effects. In this respect, each Party

shall undertake appropriate legislative, executive, administrative and/or other measures and report accordingly in conformity with Article 21.

4. As a minimum, and in accordance with its constitution or constitutional principles, each Party shall:
 - a) prohibit all forms of tobacco advertising, promotion and sponsorship that promote a tobacco product by any means that are false, misleading or deceptive or likely to create an erroneous impression about its characteristics, health effects, hazards or emissions;
 - b) require that health or other appropriate warnings or messages accompany all tobacco advertising and, as appropriate, promotion and sponsorship;
 - c) restrict the use of direct or indirect incentives that encourage the purchase of tobacco products by the public;
 - d) require, if it does not have a comprehensive ban, the disclosure to relevant governmental authorities of expenditures by the tobacco industry on advertising, promotion and sponsorship not yet prohibited. Those authorities may decide to make those figures available, subject to national law, to the public and to the Conference of the Parties, pursuant to Article 21;
 - e) undertake a comprehensive ban or, in the case of a Party that is not in a position to undertake a comprehensive ban due to its constitution or constitutional principles, restrict tobacco advertising, promotion and sponsorship on radio, television, print media and, as appropriate, other media, such as the internet, within a period of five years; and
 - f) prohibit, or in the case of a Party that is not in a position to prohibit due to its constitution or constitutional principles restrict, tobacco sponsorship of international events, activities and/or participants therein.
5. Parties are encouraged to implement measures beyond the obligations set out in paragraph 4.
6. Parties shall co-operate in the development of technologies and other means necessary to facilitate the elimination of cross-border advertising.
7. Parties which have a ban on certain forms of tobacco advertising, promotion and sponsorship have the sovereign right to ban those forms of cross-border tobacco advertising, promotion and sponsorship entering their territory and to impose equal penalties as those applicable to domestic advertising, promotion and sponsorship originating from their territory in accordance with their national law. This paragraph does not endorse or approve of any particular penalty.
8. Parties shall consider the elaboration of a protocol setting out appropriate measures that require international collaboration for a comprehensive ban on cross-border advertising, promotion and sponsorship.

The practical application of Article 13 was further elaborated at the third Conference of the Parties to the Framework Convention on Tobacco Control, in November 2008, where **Guidelines relating to Article 13** were adopted.

ANNEX 2: CITIZENS' SURVEY QUESTIONNAIRE

Title: ABOUT YOU

Q1. How old are you?

DP : min value = 15

RECODE OF Q1: q1_cat. Age in categories

1. 15-18 years
2. 19-24 years
3. 25-29 years
4. 30-34 years
5. 35-44 years
6. 45-54 years
7. 55+ years

Title: ABOUT YOU

Q2. What is your gender?

1. Male
2. Female

Title: ABOUT YOU

Q3. In which country do you live?

1. Denmark
2. France
3. Germany
4. Hungary
5. Lithuania
6. Netherlands
7. Poland
8. Portugal
9. Spain
10. Greece
11. United Kingdom

Title: ABOUT YOU

Q4. What is the highest educational degree you have obtained?

1. *Did not finish high school*
2. *Secondary education (high school degree)*
3. *Tertiary education (university degree e.g. bachelor)*
4. *Postgraduate degree (e.g. master/doctorate)*

Title: ABOUT YOU

Q5. What is your employment status?

1. *Employed full-time*
2. *Employed part-time*
3. *Self-employed*
4. *Not employed but in education or training*
5. *Not employed, not in education and not in training*

Title: ABOUT YOU

Q6. How many adults and how many children live in your household (including yourself)?

Q6x1. *Number of adults : 0, 1, 2, 3, 4, 5+*

Q6x2. *Number of children (< age of 18): 0, 1, 2, 3, 4, 5+*

Title: ABOUT YOU

Q7. Which of the following best describes the place where you live?

1. *Rural area*
2. *Village*
3. *Town*
4. *City*

Title: ABOUT YOU

Q8. What letter best matches your household's total net income? Use the column that you know best: weekly, monthly or annual income.

	WEEKLY	MONTHLY	YEARLY
0	No income	No income	No income
A	Less than £ 39	Less than £ 169	Less than £ 2,059
B	£ 40 to £ 69	£ 170 to £ 299	£ 2,060 to £ 3,609
C	£ 70 to £ 109	£ 300 to £ 519	£ 3,610 to £ 6,189
D	£ 110 to £ 179	£ 520 to £ 769	£ 6,190 to £ 9,279
E	£ 180 to £ 269	£ 770 to £ 1,159	£ 9,280 to £ 13,919
F	£ 270 to £ 389	£ 1,160 to £ 1,679	£ 13,920 to £ 20,109
G	£ 390 to £ 539	£ 1,680 to £ 2,319	£ 20,110 to £ 27,839
H	£ 540 to £ 709	£ 2,320 to £ 3,089	£ 27,840 to £ 37,119
I	£ 710 to £ 879	£ 3,090 to £ 3,869	£ 37,120 to £ 46,399
J	£ 880 or more	£ 3,870 or more	£ 46,400 or more
K	Don't know / Would rather not say		

RECODE OF Q8: q8_cat. Income in categories

1. *Low income*
2. *Medium income*
3. *High income*
99. *Don't know/Would rather not say*

Title: ABOUT YOUR USE OF TOBACCO PRODUCTS

First we would like to ask some questions about tobacco smoking. By "smoking" we mean products that you light with a flame and that burn tobacco. By "tobacco" we mean cigarettes that people can buy in packs and the ones they can roll themselves (roll-ups / hand-rolled cigarettes) as well as cigars, pipes and other tobacco products.

Q9. Which of the following best describes you?

1. *I have never smoked*
2. *I have only ever smoked once*
3. *I used to smoke sometimes but I never smoke now*
4. *I sometimes smoke now but I don't smoke as much as once per week*
5. *I usually smoke between one-six times per week*
6. *I usually smoke more than six times a week*

DP: Filter: Only if Q9=1 (never smoked)

Title: ABOUT YOUR USE OF TOBACCO PRODUCTS

Q10. Could you indicate which of the following best describes you?

1. *I have never tried smoking not even a puff or two*
2. *I did once have a puff or two but I never smoke now*
3. *I do sometimes smoke*

DP: Filter: Only if Q9=4 (sometimes smoke) or Q9=5 (smoke 1-6 times) or Q9=6 (smoke >6 times) or Q10=3 (sometimes smoke)

Title: ABOUT YOUR USE OF TOBACCO PRODUCTS

Q11. How many cigarettes do you usually smoke in one day? If you smoke hand-rolled cigarettes, please say approximately how many you usually smoke in one day.

1. <1
2. 1-4
3. 5-9
4. 10-14
5. 15-19
6. 20+
7. *I'm not sure*

Title: ABOUT YOUR USE OF E-CIGARETTES

Now we would like to ask some questions about electronic cigarettes. E-cigarettes are battery operated devices which don't contain tobacco, but which involve heating nicotine and other chemicals into a vapour that is inhaled. Here are some examples to remind you what they sometimes look like:



Q12. Which of these best describes whether or not you have ever used or tried electronic cigarettes/e-cigarettes ?

1. *I have never tried an e-cigarette, not even a puff or two*
2. *I have only ever tried e-cigarettes once or twice*
3. *I have used e-cigarettes in the past but I never use them now*
4. *I occasionally use e-cigarettes (less than once a month)*
5. *I use e-cigarettes at least once a month*
6. *I use e-cigarettes at least once a week*
7. *I use e-cigarettes daily*

DP: Filter: do not show this question if code 1 (never) is chosen in Q12

ALSO, DO NOT SHOW IF CODE 7 (DAILY) IS SHOWN IN Q12

Title: ABOUT YOUR USE OF E-CIGARETTES

Q13. When did you last try or use an e-cigarette, even if it was just a puff or two?

1. *Today*
2. *Yesterday*
3. *In the last week*
4. *More than one week but less than one month ago*
5. *More than one month ago*
6. *I'm not sure*

Title: USE OF PRINT MEDIA

Q14. How often have you read any of the following media in the last 12 months?

Q14_1. National and local newspapers & magazines

Q14_2. International newspapers & magazines

Q14_3. Magazines produced for airplanes, ships and other means of transport

Q14_4. Print media aimed primarily at young people (<age of 18)

Answer options:

1. *Daily*
2. *2-3 times a week*
3. *Weekly*
4. *Once every two weeks*
5. *Monthly*
6. *Less than monthly*
7. *Never*

Title: TOBACCO ADVERTISING IN PRINT MEDIA

Q15. Do you recall any form of tobacco advertising in any of these media?

Advertising is defined broadly to include articles praising tobacco companies or mentioning tobacco brands or products in a positive light.

DP: FILTER: only show rows if Q14 is **NOT** "never"

Q15_1. National and local newspapers & magazines

Q15_2. International newspapers & magazines

Q15_3. Magazines produced for airplanes, ships and other means of transport

Q15_4. Print media aimed primarily at young people (<age of 18)

Answer options:

1. *Often*
2. *Occasionally*
3. *Very rarely*
4. *Never*

Title: ELECTRONIC CIGARETTE ADVERTISING IN PRINT MEDIA

Q16. Do you recall any form of electronic cigarette advertising in any of these media?

Advertising is defined broadly to include articles praising electronic cigarette companies or mentioning electronic cigarette brands or products in a positive light.

DP: FILTER: only show rows if Q14 is **NOT** "never"

Q16_1. National and local newspapers & magazines

Q16_2. International newspapers & magazines

Q16_3. Magazines produced for airplanes, ships and other means of transport

Q16_4. Print media aimed primarily at young people (<age of 18)

Answer options:

1. *Often*
2. *Occasionally*
3. *Very rarely*
4. *Never*

Title: USE OF INTERNET AND MOBILE APPLICATIONS

In this section we ask about websites, search engines, social media, online video (e.g. YouTube), and online games. We also ask about online applications that can be accessed via mobile devices (e.g. smartphones).

Q17. Please estimate to what extent you have used any of the following in the last 12 months:

Q17_1. E-commerce websites (Amazon, shops, etc.)

Q17_2. Online retailers of tobacco and related products

Q17_3. Online retailers of electronic cigarettes and related products

Q17_4. Online search engines (Google, Yahoo, etc.)

Q17_5. Social media (Facebook/Twitter, etc.)

Q17_6. Websites that stream online video clips (YouTube, etc.)

Q17_7. Online games

Q17_8. Appstore or apps downloaded from appstores for mobile devices (e.g. smartphones)

Answer options:

1. *Daily*
2. *2-3 times a week*
3. *Weekly*
4. *Once every two weeks*
5. *Monthly*
6. *Less than monthly*
7. *Never*

Title: TOBACCO ADVERTISING IN INTERNET AND MOBILE APPLICATIONS

Q18. Do you recall any form of tobacco advertising in any of these media?

Advertising is defined broadly to include not only traditional banner advertising but also the website content itself (e.g. tobacco related pages on social media, online videos featuring people smoking / tobacco companies / brands, etc.)

DP: FILTER: only show rows if Q17 is **NOT** "never"

- Q18_1. E-commerce websites (Amazon, shops, etc.)
- Q18_2. Online retailers of tobacco and related products
- Q18_3. Online retailers of electronic cigarettes and related products
- Q18_4. Online search engines (Google, Yahoo, etc.)
- Q18_5. Social media (Facebook/Twitter, etc.)
- Q18_6. Websites that stream online video clips (YouTube, etc.)
- Q18_7. Online games
- Q18_8. Appstore or apps downloaded from appstores for mobile devices (e.g. smartphones)

Answer options:

1. *Often*
2. *Occasionally*
3. *Very rarely*
4. *Never*

Title: ELECTRONIC CIGARETTE ADVERTISING IN INTERNET AND MOBILE APPLICATIONS

Q19. Do you recall any form of electronic cigarette advertising in any of these media?

Advertising is defined broadly to include not only traditional banner advertising but also the website content itself (e.g. electronic cigarette related pages on social media, online videos featuring people using electronic cigarettes / electronic cigarette companies / brands, etc.)

DP: FILTER: only show rows if Q17 is **NOT** "never"

- Q19_1. E-commerce websites (Amazon, shops, etc.)
- Q19_2. Online retailers of tobacco and related products
- Q19_3. Online retailers of electronic cigarettes and related products
- Q19_4. Online search engines (Google, Yahoo, etc.)
- Q19_5. Social media (Facebook/Twitter, etc.)
- Q19_6. Websites that stream online video clips (YouTube, etc.)
- Q19_7. Online games
- Q19_8. Appstore or apps downloaded from appstores for mobile devices (e.g. smartphones)

Answer options:

1. *Often*
2. *Occasionally*
3. *Very rarely*
4. *Never*

Title: TOBACCO ADVERTISING OUTSIDE THE HOME

Q21. Do you recall any form of tobacco advertising in any of these media?

Advertising is defined broadly to include all posters or billboards that show people smoking, show tobacco products or show tobacco brands.

Q21_1. Billboards / posters outside a shop / in a shop window

Q21_2. Billboards in stadia or at events

Q21_4. Advertising in different forms of transport (public transport, taxi, car, rail, etc.)

Q21_5. Advertising in cinemas (i.e. before a film)

Q21_7. Temporary sales/promotions

Q21_6. Other types of outdoor advertising

Answer options:

1. *Often*
2. *Occasionally*
3. *Very rarely*
4. *Never*

Title: ELECTRONIC CIGARETTE ADVERTISING OUTSIDE THE HOME

Q22. Do you recall any form of electronic cigarette advertising in any of these media?

Advertising is defined broadly to include all posters or billboards that show people using electronic cigarettes, show electronic cigarette products or show electronic cigarette brands.

Q22_1 Billboards / posters outside a shop / in a shop window

Q22_2. Billboards in stadia or at events

Q22_4. Advertising in different forms of transport (public transport, taxi, car, rail, etc.)

Q22_5. Advertising in cinemas (i.e. before a film)

Q22_7. Temporary sales/promotions

Q22_6. Other types of outdoor advertising

Answer options:

1. *Often*
2. *Occasionally*
3. *Very rarely*
4. *Never*

Title: USE OF TV AND RADIO

Q23. Please estimate to what extent you have used any of the following in the last 12 months:

Q23_1. National or local TV channels

Q23_2. TV channels from another country

Q23_3. On-demand TV programmes (e.g. streamed online or via a special device in your home)

Q23_4. National or local radio channels

Q23_5. Radio channels from another country

Q23_6. On-demand radio programmes (e.g. streamed online)

Answer options:

1. *Daily*
2. *2-3 times a week*
3. *Weekly*
4. *Once every two weeks*
5. *Monthly*
6. *Less than monthly*
7. *Never*

Title: PRODUCT PLACEMENT OF TOBACCO PRODUCTS ON TV AND RADIO

Q24. Do you recall any form of tobacco product placement in any of these media?

By product placement we mean tobacco products or brands being featured, shown or mentioned in films, television programmes or radio broadcasts. This can also include people smoking tobacco products.

DP: FILTER: only show rows if Q23 is **NOT** "never"

Q24_1. National or local TV channels

Q24_2. TV channels from another country

Q24_3. On-demand TV programmes (e.g. streamed online or via a special device in your home)

Q24_4. National or local radio channels

Q24_5. Radio channels from another country

Q24_6. On-demand radio programmes (e.g. streamed online)

Answer options:

1. *Often*
2. *Occasionally*
3. *Very rarely*
4. *Never*

Title: TRADITIONAL ADVERTISING OF ELECTRONIC CIGARETTES ON TV AND RADIO

Q26. Do you recall any form of electronic cigarette advertising in any of these media?

By traditional advertising we only mean commercials and infomercials showing electronic cigarette products or brands.

DP: FILTER: only show rows if Q23 is **NOT** "never"

Q26_1. National or local TV channels

Q26_2. TV channels from another country

Q26_3. On-demand TV programmes (e.g. streamed online or via a special device in your home)

Q26_4. National or local radio channels

Q26_5. Radio channels from another country

Q26_6. On-demand radio programmes (e.g. streamed online)

Answer options:

1. Often
2. Occasionally
3. Very rarely
4. Never

Title: PRODUCT PLACEMENT OF ELECTRONIC CIGARETTES ON TV AND RADIO

Q27. Do you recall any form of electronic cigarette product placement in any of these media?

By product placement we mean electronic cigarette products or brands being featured, shown or mentioned in films, television programmes or radio broadcasts. This can also include people using electronic cigarette products.

DP: FILTER: only show rows if Q23 is **NOT** "never"

Q27_1. National or local TV channels

Q27_2. TV channels from another country

Q27_3. On-demand TV programmes (e.g. streamed online or via a special device in your home)

Q27_4. National or local radio channels

Q27_5. Radio channels from another country

Q27_6. On-demand radio programmes (e.g. streamed online)

Answer options:

1. Often
2. Occasionally
3. Very rarely
4. Never

Title: USE OF RETAIL OUTLETS

Q28. Please estimate to what extent you have used (or seen) any of the following retail outlets in the last 12 months in your country:

- Q28_1. Large stores (e.g. supermarket)
- Q28_2. Small stores (e.g. convenience stores, newsagents)
- Q28_3. Petrol / gas stations
- Q28_4. Cafés / restaurants
- Q28_5. Specialised alcohol retailers (e.g. off-licences)
- Q28_6. Specialised tobacconists
- Q28_7. Specialised e-cigarette shop
- Q28_8. Tobacco vending machines
- Q28_9. Outdoor kiosks, mobile shops/vans, or street markets
- Q28_10. Pharmacies

Answer options:

1. *Daily*
2. *2-3 times a week*
3. *Weekly*
4. *Once every two weeks*
5. *Monthly*
6. *Less than monthly*
7. *Never*

Title: TOBACCO ADVERTISING IN RETAIL OUTLETS

Q29. Do you recall any form of tobacco advertising in, outside or on the front of any of these outlets?

DP: FILTER: only show rows if Q28 is **NOT** "never" + **NEVER** SHOW ITEM 10 Pharmacies in Q29

- Q29_1. Large stores (e.g. supermarket)
- Q29_2. Small stores (e.g. convenience stores, newsagents)
- Q29_3. Petrol / gas stations
- Q29_4. Cafés / restaurants
- Q29_5. Specialised alcohol retailers (e.g. off-licences)
- Q29_6. Specialised tobacconists
- Q29_7. Specialised e-cigarette shop
- Q29_8. Tobacco vending machines

Q29_9. Outdoor kiosks, mobile shops/vans, or street markets

Answer options:

1. *Often*
2. *Occasionally*
3. *Very rarely*
4. *Never*

Title: ELECTRONIC CIGARETTE ADVERTISING IN RETAIL OUTLETS

Q30. Do you recall any form of electronic cigarette advertising in (or on the front of) any of these outlets?

DP: FILTER: only show rows if Q28 is **NOT** "never"

- Q30_1. Large stores (e.g. supermarket)
- Q30_2. Small stores (e.g. convenience stores, newsagents)
- Q30_3. Petrol / gas stations
- Q30_4. Cafés / restaurants
- Q30_5. Specialised alcohol retailers (e.g. off-licences)
- Q30_6. Specialised tobacconists
- Q30_7. Specialised e-cigarette shop
- Q30_8. Tobacco vending machines
- Q30_9. Outdoor kiosks, mobile shops/vans, or street markets
- Q30_10. Pharmacies

Answer options:

1. *Often*
2. *Occasionally*
3. *Very rarely*
4. *Never*

Title: FREE SAMPLES, FREE GIFTS AND PROMOTIONAL ITEMS

Q31. Do you recall any form of tobacco samples, free gifts or promotional items in the last 12 months?

By this we mean the distribution of free tobacco product samples, or free gifts supplied by tobacco manufacturers, or tobacco-branded promotional items, in the street, in train stations and public transport hubs, in the mail/post, online, at events, in restaurants/bars/discotheques and any other retail outlets

1. *Often*
2. *Occasionally*
3. *Very rarely*
4. *Never*
9. *Don't know*

DP: FILTER: only if Q31=1 or Q31=2 or Q31=3

DP: multi

Title: TOBACCO SAMPLES, FREE GIFTS AND PROMOTIONAL ITEMS

Q32. Where did this take place?

Please tick all that apply.

- Q32_1. My home country*
- Q32_2. In another country in the EU*
- Q32_3. In another country outside the EU*

DP: FILTER: only if Q31=1 or Q31=2 or Q31=3

DP: multi

Title: TOBACCO SAMPLES, FREE GIFTS AND PROMOTIONAL ITEMS

Q33. In what context did this take place?

Please tick all that apply.

- Q33_1. In the street*
- Q33_2. In the mail/post*
- Q33_3. At events*
- Q33_4. In restaurants/bars/discotheques*
- Q33_6. Online*
- Q33_7. Train stations and public transport hubs*
- Q33_5. At another retail outlet*
- Q33_8. Other, please specify where: [DP: insert text box]*

CODES ADDED BASED ON OPEN ENDED ANSWERS (Q33_8 Other):

- Q33_10. Media*
- Q33_12. Petrol station*
- Q33_13. In a shopping centre*
- Q33_14. In a tobacco shop*
- Q33_15. At school or work*

Q33_16. *By the sea shore*

Q33_11. *Other not specified*

Q33_99. *Don't know/NA*

Title: ELECTRONIC CIGARETTE SAMPLES, FREE GIFTS AND PROMOTIONAL ITEMS

Q35. Do you recall any form of electronic cigarette samples, free gifts or promotional items in the last 12 months?

By this we mean the distribution of free e-cigarette product samples, or free gifts supplied by e-cigarette manufacturers, or e-cigarette-branded promotional items, in the street, in train stations and public transport hubs, in the mail/post, online, at events, in restaurants/bars/discotheques and any other retail outlets.

1. *Often*
2. *Occasionally*
3. *Very rarely*
4. *Never*
9. *Don't know*

DP: FILTER: only if Q35=1 or Q35=2 or Q35=3

DP: multi

Title: ELECTRONIC CIGARETTE SAMPLES, FREE GIFTS AND PROMOTIONAL ITEMS

Q36. Where did this take place?

Please tick all that apply.

- Q36_1. *My home country*
- Q36_2. *In another country in the EU*
- Q36_3. *In another country outside the EU*

DP: FILTER: only if Q35=1 or Q35=2 or Q35=3

DP: multi

Title: ELECTRONIC CIGARETTE SAMPLES, FREE GIFTS AND PROMOTIONAL ITEMS

Q37. In what context did this take place?

Please tick all that apply.

- Q37_1. *In the street*
- Q37_2. *In the mail/post*
- Q37_3. *At events*
- Q37_4. *In restaurants/bars/discotheques*
- Q37_6. *Online*
- Q37_7. *Train stations and public transport hubs*

Q37_5. *At another retail outlet*

Q37_8. *Other, please specify where: [DP: insert text box]*

CODES ADDED BASED ON OPEN ENDED ANSWERS (Q37_8 Other):

Q37_10. *Media*

Q37_13. *In a shopping centre*

Q37_14. *In a tobacco shop*

Q37_11. *Other not specified*

Title: SPONSORSHIPS

Q39. Do you recall seeing/attending/experiencing any tobacco sponsored events in the last 12 months?

By this we mean financial support for cultural, sporting and other events, or for organisations.

1. *Yes*
2. *No*

DP: FILTER: only if Q39=1 (yes)

Title: TOBACCO SPONSORED EVENTS

Q40. Please provide further detail about each of these tobacco sponsored events.

<i>Event</i>	<i>Location</i> <i>Answer options:</i> 1. My home country 2. In another country in the EU 3. In another country outside the EU	<i>Primary audience</i> <i>Answer options:</i> 1. Primarily international audience 2. Primarily a national audience 3. Primarily a local audience	<i>Type of sponsorship</i> <i>Answer options:</i> 1. Cultural event 2. Sporting event 3. Political event 4. Sponsoring of an organisation 5. Other	<i>I attended personally</i> <i>Answer options:</i> 1. Yes 2. No
<i>Event 1</i>	Q40x1_1	Q40x2_1	Q40x3_1	Q40x4_1
<i>Event 2</i>	Q40x1_2	Q40x2_2	Q40x3_2	Q40x4_2
<i>Event 3</i>	Q40x1_3	Q40x2_3	Q40x3_3	Q40x4_3
<i>Event 4</i>	Q40x1_4	Q40x2_4	Q40x3_4	Q40x4_4
<i>Event 5</i>	Q40x1_5	Q40x2_5	Q40x3_5	Q40x4_5

DP: FILTER: only if Q39=1 (yes)

Title: TOBACCO SPONSORED EVENTS

Q41. On the whole, how frequently would you say that you see sponsorship by tobacco companies?

1. Often
2. Occasionally
3. Very rarely
4. Never
9. Don't know

Title: ELECTRONIC CIGARETTE SPONSORED EVENTS

Q42. Do you recall seeing/attending/experiencing any electronic cigarette sponsored events in the last 12 months?

1. Yes
2. No

DP: FILTER: only if Q42=1 (yes)

Title: ELECTRONIC CIGARETTE SPONSORED EVENTS

Q43. Please provide further detail about each of these electronic cigarette sponsored events

<i>Event</i>	<i>Location</i> <i>Answer options:</i> 1. My home country 2. In another country in the EU 3. In another country outside the EU	<i>Primary audience</i> <i>Answer options:</i> 1. Primarily international audience 2. Primarily a national audience 3. Primarily a local audience	<i>Type of sponsorship</i> <i>Answer options:</i> 1. Cultural event 2. Sporting event 3. Political event 4. Sponsoring of an organisation 5. Other	<i>I attended personally</i> <i>Answer options:</i> 1. Yes 2. No
<i>Event 1</i>	Q43x1_1	Q43x2_1	Q43x3_1	Q43x4_1
<i>Event 2</i>	Q43x1_2	Q43x2_2	Q43x3_2	Q43x4_2
<i>Event 3</i>	Q43x1_3	Q43x2_3	Q43x3_3	Q43x4_3
<i>Event 4</i>	Q43x1_4	Q43x2_4	Q43x3_4	Q43x4_4
<i>Event 5</i>	Q43x1_5	Q43x2_5	Q43x3_5	Q43x4_5

DP: FILTER: only if Q42=1 (yes)

Title: ELECTRONIC CIGARETTE SPONSORED EVENTS

Q44. On the whole, how frequently would you say that you see sponsorship by electronic cigarette companies?

1. Often
2. Occasionally
3. Very rarely
4. Never
9. Don't know

Title: CORPORATE SOCIAL RESPONSIBILITY (CSR)

Q45. Do you recall seeing/reading about/attending/experiencing any corporate social responsibility initiatives involving tobacco companies in the last 12 months?

By this we mean donations, funding for research or scholarship, corporate entertaining, and any other activities carried out by companies under the heading of corporate social responsibility.

1. Yes
2. No

DP: FILTER: only if Q45=1 (yes)

DP: multi

Title: CORPORATE SOCIAL RESPONSIBILITY (CSR) INVOLVING TOBACCO COMPANIES

Q46. Where did this take place?

Please tick all that apply.

- Q46_1. My home country
- Q46_2. In another country in the EU
- Q46_3. In another country outside the EU

DP: FILTER: only if Q45=1 (yes)

Title: CORPORATE SOCIAL RESPONSIBILITY (CSR) INVOLVING TOBACCO COMPANIES

Q47. Please briefly describe the CSR activity?

Please tick all that apply.

DP: multi

- Q47_1. Funding for research or scholarship
- Q47_2. Corporate entertaining

Q47_3. *Charity event*

Q47_4. *Other, please specify: [DP: insert text box]*

CODES ADDED BASED ON OPEN ENDED ANSWERS (Q47_4 Other):

Q47_5. *Ethical practices*

Q47_10. *Music event*

Q47_11. *Sporting event*

Q47_98. *Other (not specified)*

Q47_99. *Don't know/NA*

DP: FILTER: only if Q45=1 (yes)

Title: CORPORATE SOCIAL RESPONSIBILITY (CSR) INVOLVING TOBACCO COMPANIES

Q48. In your view how frequently do you see CSR activities by tobacco companies?

1. *Often*
2. *Occasionally*
3. *Very rarely*
4. *Never*
9. *Don't know*

Title: CORPORATE SOCIAL RESPONSIBILITY (CSR) INVOLVING ELECTRONIC CIGARETTE COMPANIES

Q49. Do you recall seeing/reading about/attending/experiencing any corporate social responsibility initiatives involving electronic cigarette companies in the last 12 months?

By corporate social responsibility we mean donations, funding for research or scholarship, corporate entertaining, and any other activities carried out by companies under the heading of corporate social responsibility.

1. *Yes*
2. *No*

DP: FILTER: only if Q49=1 (yes)

DP: multi

Title: CORPORATE SOCIAL RESPONSIBILITY (CSR) INVOLVING ELECTRONIC CIGARETTE COMPANIES

Q50. Where did this event take place?

Please tick all that apply.

Q50_1. *My home country*

Q50_2. In another country in the EU

Q50_3. In another country outside the EU

DP: FILTER: only if Q49=1 (yes)

DP: multi

Title: CORPORATE SOCIAL RESPONSIBILITY (CSR) INVOLVING ELECTRONIC CIGARETTE COMPANIES

Q51. Please briefly describe the CSR activity?

Please tick all that apply.

Q51_1. Funding for research or scholarship

Q51_2. Corporate entertaining

Q51_3. Charity event

Q51_4. Other, please specify: [DP: insert text box]

CODES ADDED BASED ON OPEN ENDED ANSWERS (Q51_4 Other):

Q51_10. Music event

Q51_11. Sporting event

Q51_98. Other (not specified)

Q51_99. Don't know/NA

DP: FILTER: only if Q49=1 (yes)

Title: CORPORATE SOCIAL RESPONSIBILITY (CSR) INVOLVING ELECTRONIC CIGARETTE COMPANIES

Q52. In your view, how frequently do you see CSR activities by electronic cigarette companies?

1. Often

2. Occasionally

3. Very rarely

4. Never

9. Don't know

Title: BRAND STRETCHING AND IMITATION PRODUCTS

Q53. Do you recall seeing/attending/experiencing any examples of tobacco companies marketing non-tobacco products in the last 12 months?

By this we mean tobacco companies producing non-tobacco products under their brand name, such as clothing. We are also interested in imitation products, such as tobacco companies selling

e-cigarettes using the same brand name as tobacco products and which resemble tobacco products).

1. *Yes*
2. *No*

DP: FILTER: only if Q53=1 (yes)

DP: multi

Title: BRAND STRETCHING AND IMITATION PRODUCTS

Q54. Where did this take place?

Please tick all that apply.

- Q54_1. My home country*
- Q54_2. In another country in the EU*
- Q54_3. In another country outside the EU*

DP: FILTER: only if Q53=1 (yes)

DP: multi

Title: BRAND STRETCHING AND IMITATION PRODUCTS

Q55. Which form did the activity take?

Please tick all that apply.

- Q55_1. Tobacco company marketing non-nicotine products (clothing, lighters, parasols etc.)*
- Q55_2. Tobacco company marketing nicotine products (e.g. e-cigarettes)*

DP: FILTER: only if Q53=1 (yes)

Title: BRAND STRETCHING AND IMITATION PRODUCTS

Q56. In your view, how frequently do you see tobacco companies selling non-tobacco products?

1. *Often*
2. *Occasionally*
3. *Very rarely*
4. *Never*
9. *Don't know*

Q57. Do you recall any tobacco advertising or promotion in an area that was not covered in this survey?

Free text

RECODE OF Q57: variables Q57_CODE1, Q57_CODE2, Q57_CODE3

1. *Print advertising*
2. *In the street, billboards, posters*
3. *On bus, bus stops, station,*
4. *Sporting event, F 1*
5. *TV, radio, movies*
6. *Online*
7. *In store, supermarket, market*
8. *Tobacco store*
9. *Airport*
10. *On packages of e-cigarettes*
11. *Mail, leaflet, folder*
12. *People talking about it, discussion*
13. *Selling point, people smoking, place where smoking of e-cigarettes is allowed*
14. *Tobacco brand mentioned*
15. *E-cigarette (brand) mentioned*
16. *In other country*
17. *Recall anti-smoking campaign*
18. *Restaurants, bars, discotheques*
19. *Contests / offers for free products from tobacco companies*
96. *Other*
98. *Yes, I recall advertising/promotion*
99. *No, don't know, no answer*

Q58. Do you recall any e-cigarette advertising or promotion in an area that was not covered in this survey?

Free text

RECODE OF Q58: variables Q58_CODE1, Q58_CODE2, Q58_CODE3

1. *Print advertising*
2. *In the street, billboards, posters*
3. *On bus, bus stops, station,*
4. *Sporting event, F 1*
5. *TV, radio, movies*
6. *Online*
7. *In store, supermarket, market*
8. *Tobacco/e-cig store*
9. *Airport*
10. *on packages of e-cigarettes*
11. *Mail, leaflet, folder*
12. *People talking about it, discussion*
13. *Selling point, people smoking, place where smoking of e-cigarettes is allowed*
14. *Tobacco brand mentioned*
15. *E-cigarette (brand) mentioned*
16. *In other country*
17. *Recall anti-smoking campaign*
18. *Restaurants, bars, discotheques*
96. *Other*
97. *No, I don't recall advertising/promotion*
98. *Yes, I recall advertising/promotion*
99. *No, don't know, no answer*

ANNEX 3: KEY INFORMANTS' SURVEY QUESTIONNAIRE

The survey was sent to key informants in: Bulgaria, Denmark, France, Germany, Greece, Hungary, Lithuania, Netherlands, Poland, Spain, and United Kingdom.

Introduction

Dear colleague,

Thank you for agreeing to complete this survey concerning the marketing of tobacco and e-cigarette products at point of sale as part of a *Request for Specific Services CHAFEA/2014/Health/18* concerning an assessment of citizens' exposure to tobacco marketing (as part of the Framework Contract № EAHC/2013/HEALTH/10 LOT 2 – LABELLING, PACKAGING, PRESENTATION AND MARKETING OF TOBACCO AND RELATED PRODUCTS).

This questionnaire contains four sections:

Section A asks about current legislation in your country concerning the marketing of tobacco products and electronic cigarettes (e-cigarettes). We are aware that, under the Tobacco Advertising Directive (2003/33/EC) and Audiovisual Media Services Directive (2007/65/EC), cross-border advertising and sponsorship for tobacco products in print media, radio, TV and internet should already be banned, including surreptitious product placement, i.e. where the viewer is not adequately informed of the existence of product placement.

However, we are interested in the level of compliance with this legislation, and in whether there are any exceptions. This is what we mean by a 'partial control' (for example, a partial control could mean that advertising is banned for all tobacco products apart from cigars, or is banned in all print media apart from magazines for retailers).

Similarly, we are aware that the Tobacco Products Directive will be implemented from 2016 and thus rules around marketing will change. Thus we are interested in any **current** national legislation or controls on e-cigarette marketing, in the level of compliance with this legislation, and whether there are any exceptions.

Section B asks about four specific types of marketing for tobacco and e-cigarettes in your country: competitions and prize draws, free trial offers, free gift promotions, and advertising on internet and mobile applications.

In the case of advertising on the internet and mobile applications, we would like you to review what kind of advertising for these products is currently in use, by actively visiting four popular local language social media websites in your country. In the questionnaire we suggest various ways in which you could select these websites. If you are having difficulty in selecting websites, please contact [insert SFP contact details] for guidance.

Section C asks about point of sale displays in your country, and the use of marketing in shops and places where tobacco products and e-cigarettes are sold. To provide a more reliable profile of point of sale marketing activity it will be necessary to visit a selection of retail outlets before completing these questions, or to seek wider opinion on these issues from people who frequent these types of outlet.

Section D asks you to provide details of any reports containing relevant information on legislation, compliance, marketing and under-age access to tobacco in your country, and to forward these reports if possible.

Thank you for your help with this important survey. Please return the completed survey to jennifer.burch@smokefreepartnership by 16th January 2015. If you have any queries, please call us on +32 (0) 2 738 03 17.

Warmest wishes,

A handwritten signature in black ink, appearing to read 'F. Berteletti', with a horizontal line underneath.

Florence Berteletti

SFP Director

Section A: Legislation

The following questions are about current legislation in your country. For each question we want to know whether there is legislation to ban this form of tobacco marketing completely (*a full ban*), or whether there is legislation to ban or control some forms of it or in certain circumstances (*a partial ban/control*).

A partial ban/control might mean that, for example:

- advertising is permitted for cigars but not for other tobacco products,
- or that advertising is permitted in magazines for tobacco traders/retailers but not in magazines for the general public,
- or that advertising is not permitted on billboards near schools but is permitted on other billboards
- or that advertising is permitted at a local level but not nationally.

Tobacco

All the questions in this section are about tobacco marketing, including cigarettes, cigars, rolling tobacco and other tobacco products

1. Print advertising for the general public (eg. newspapers, magazines)

(by print, we mean: newspapers and magazines for the general public, magazines on aeroplanes, trains etc., and leaflets/brochures/catalogues/flyers)

1.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no advertising permitted)

If there is a full ban, continue, otherwise go to (b)

Write in year(s) and month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some forms of advertising permitted – see above for definition)

If there is a partial ban/control please continue, otherwise go to (c)

Write in year(s) and month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

1.2 Please indicate below whether any of the following also apply:

(a) Ban/control due to be implemented
in the future

*If ticked please give
details below, otherwise go to
(b)*

Please give details

(b) Currently under review at national
level

*If ticked please give
details below*

Please give details

2. Print advertising in the trade press (eg. magazines and newsletters for tobacco traders and retailers)

(by print, we mean: newspapers and magazines for the general public, magazines on aeroplanes, trains etc., and leaflets/brochures/catalogues/flyers)

2.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no advertising permitted)

*If there is a full ban,
continue, otherwise go to (b)*

Write in year(s) and
month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some forms of advertising permitted)

If there is a partial ban/control please continue, otherwise go to (c)

Write in year(s) and month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

2.2 Please indicate below whether any of the following also apply:

- (a) Ban/control due to be implemented in the future *If ticked please give details below, otherwise go to (b)*

Please give details

- (b) Currently under review at national level *If ticked please give details below*

Please give details

3. Internet and mobile applications ('apps')

(by internet and mobile applications, we mean: sales sites, sites that give out free samples, search engines, advertising in social media (e.g. Facebook, MySpace, Tuenti), online video (e.g. YouTube), online games, applications for mobile devices, and frequently visited websites where advertising banners are found)

3.1 Please indicate which type of legislation currently exists in your country:

- (a) Full ban (no advertising permitted) *If there is a full ban, continue, otherwise go to (b)*

Write in year(s) and month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some forms of advertising permitted) *If there is a partial ban/control please continue, otherwise go to (c)*

Write in year(s) and month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

3.2 Please indicate below whether any of the following also apply:

- (a) Ban/control due to be implemented in the future *If ticked please give details below, otherwise go to (b)*

Please give details

- (b) Currently under review at national level *If ticked please give details below*

Please give details

4. Advertising outside the home

(by advertising outside the home, we mean: billboards, posters at bus-stops, advertising in sports stadia, advertising in taxis, and advertising on public transport etc.)

4.1 Please indicate which type of legislation currently exists in your country:

- (a) Full ban (no advertising permitted) *If there is a full ban, continue, otherwise go to (b)*

Write in year(s) and month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some forms of advertising permitted)

If there is a partial ban/control please continue, otherwise go to (c)

Write in year(s) and month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

4.2 Please indicate below whether any of the following also apply:

(a) Ban/control due to be implemented in *If ticked please give details*
the future *below, otherwise go to (b)*

Please give details

(b) Currently under review at national level

If ticked please give details below

Please give details

5. Cinema advertising

5.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no advertising permitted)

If there is a full ban, continue, otherwise go to (b)

Write in year(s) and month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some forms of advertising permitted)

If there is a partial ban/control please continue, otherwise go to (c)

Write in year(s) and month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

5.2 Please indicate below whether any of the following also apply:

- (a) Ban/control due to be implemented in the future *If ticked please give details below, otherwise go to (b)*

Please give details

- (b) Currently under review at national level *If ticked please give details below*

Please give details

6. TV advertising

6.1 Please indicate which type of legislation currently exists in your country:

- (a) Full ban (no advertising permitted) *If there is a full ban, continue, otherwise go to (b)*

Write in year(s) and month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some forms of advertising permitted)

If there is a partial ban/control please continue, otherwise go to (c)

Write in year(s) and month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

6.2 Please indicate below whether any of the following also apply:

(a) Ban/control due to be implemented in *If ticked please give details*
the future *below, otherwise go to (b)*

Please give details

(b) Currently under review at national *If ticked please give details*
level *below*

Please give details

7. Radio advertising

7.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no advertising permitted)

*If there is a full ban,
continue, otherwise go to (b)*

Write in year(s) and
month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some forms of
advertising permitted)

*If there is a partial ban/
control please continue,
otherwise go to (c)*

Write in year(s) and
month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

7.2 Please indicate below whether any of the following also apply:

- (a) Ban/control due to be implemented in the future *If ticked please give details below, otherwise go to (b)*

Please give details

- (b) Currently under review at national level *If ticked please give details below*

Please give details

8. Product placement

(by product placement, we mean manufacturers paying for their products to be featured in films and television programmes, or brand names mentioned in the likes of radio broadcasts).

8.1 Please indicate which type of legislation currently exists in your country:

- (a) Full ban (no product placement permitted) *If there is a full ban, continue, otherwise go to (b)*

Write in year(s) and month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some forms of product placement permitted)

If there is a partial ban/control please continue, otherwise go to (c)

Write in year(s) and month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

8.2 Please indicate below whether any of the following also apply:

(a) Ban/control due to be implemented in *If ticked please give details*
the future *below, otherwise go to (b)*

Please give details

(b) Currently under review at national level

If ticked please give details below

Please give details

9. Products visible on display in shops, supermarkets and other retail outlets

(by visible we mean that products can be seen by customers and are not required to be hidden behind shutters or curtains, or are not required to be stocked out of sight under a counter).

9.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (products must not be on display)

If there is a full ban, continue, otherwise go to (b)

Write in year(s) and month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (products are permitted to be on display in certain types of shop OR certain types of products are permitted to be on display)

If there is a partial ban/control please continue, otherwise go to (c)

Write in year(s) and month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

9.2 Please indicate below whether any of the following also apply:

(a) Ban/control due to be implemented in
the future

*If ticked please give details
below, otherwise go to (b)*

Please give details

(b) Currently under review at national
level

*If ticked please give details
below*

Please give details

10. Advertising at point of sale in shops, supermarkets and other retail outlets

(by this we mean posters inside shops, posters on shop windows, branding on display units or vending machines, branding on other shop furniture and fittings such as clocks and change mats).

10.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no advertising permitted)

If there is a full ban, continue, otherwise go to (b)

Write in year(s) and month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (advertising is permitted in certain types of shop OR certain types of advertising is permitted)

If there is a partial ban/control please continue, otherwise go to (c)

Write in year(s) and
month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

10.2 Please indicate below whether any of the following also apply:

(a) Ban/control due to be implemented in
the future

*If ticked please give details
below, otherwise go to (b)*

Please give details

(b) Currently under review at national
level

*If ticked please give details
below*

Please give details

11. Free samples, free gifts and promotional items

(by this we mean the distribution of free tobacco product samples, or free gifts supplied by tobacco manufacturers, or tobacco-branded promotional items, in the street, in the mail/post, at events, in restaurants/bars/discotheques and any other retail outlets).

11.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no free samples permitted)

If there is a full ban, continue, otherwise go to (b)

Write in year(s) and month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some forms of distribution of free samples are permitted)

If there is a partial ban/control please continue, otherwise go to (c)

Write in year(s) and
month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

11.2 Please indicate below whether any of the following also apply:

(a) Ban/control due to be implemented in
the future

*If ticked please give details
below, otherwise go to (b)*

Please give details

(b) Currently under review at national
level

*If ticked please give details
below*

Please give details

12. Sponsorship

(by this we mean financial support for cultural, sporting and other events, or for organisations. Examples could include brand name mentions on football shirts or a brand name attached to a music festival).

12.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no sponsorship permitted)

If there is a full ban,

continue, otherwise go to (b)

Write in year(s) and month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some sponsorship permitted)

If there is a partial ban/

control please continue, otherwise go to (c)

Write in year(s) and month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

12.2 Please indicate below whether any of the following also apply:

(a) Ban/control due to be implemented in
the future

*If ticked please give details
below, otherwise go to (b)*

Please give details

(b) Currently under review at national
level

*If ticked please give details
below*

Please give details

13. Corporate Social Responsibility actions by tobacco companies

(by this we mean donations, funding for research or scholarship, corporate entertaining, and any other activities carried out by companies under the heading of corporate social responsibility).

13.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no CSR permitted)

If there is a full ban, continue, otherwise go to (b)

Write in year(s) and month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some CSR permitted)

If there is a partial ban/control please continue, otherwise go to (c)

Write in year(s) and
month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

13.2 Please indicate below whether any of the following also apply:

(a) Ban/control due to be implemented in
the future

*If ticked please give details
below, otherwise go to (b)*

Please give details

(b) Currently under review at national
level

*If ticked please give details
below*

Please give details

14. Brand stretching and imitation products

(by this we mean companies producing non-tobacco products under their brand name, such as clothing. We are also interested in imitation products, such as tobacco companies selling e-cigarettes using the same brand name as tobacco products and which resemble tobacco products).

14.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no brand stretching permitted)

If there is a full ban, continue, otherwise go to (b)

Write in year(s) and month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some brand stretching permitted for certain types of products)

If there is a partial ban/control please continue, otherwise go to (c)

Write in year(s) and
month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

14.2 Please indicate below whether any of the following also apply:

- (a) Ban/control due to be implemented in
the future

*If ticked please give details
below, otherwise go to (b)*

Please give details

- (b) Currently under review at national
level

*If ticked please give details
below*

Please give details

E-cigarettes including vaporisers

All the questions in this section are about electronic cigarettes (e-cigarettes) including vaporisers. E-cigarettes are battery operated devices which don't contain tobacco, but which involve heating nicotine and other chemicals into a vapour that is inhaled. The picture below illustrates some types of e-cigarettes.



In 2016, the Tobacco Products Directive will be introduced and restrictions on e-cigarette advertising will be introduced. These will vary based on nicotine content of the devices. The questions here relate to the CURRENT situation in your country, not what will occur in the future.

15. Print advertising (e.g. newspapers, magazines)

(by print, we mean: newspapers and magazines for the general public, newspapers and magazines for tobacco traders/retailers, magazines on aeroplanes, trains etc., and leaflets/brochures/catalogues/flyers)

15.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no advertising permitted)

*If there is a full ban,
continue, otherwise go to (b)*

Write in year(s) and
month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some forms of advertising permitted)

If there is a partial ban/control please continue, otherwise go to (c)

Write in year(s) and month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

16. Print advertising in the trade press (eg. magazines and newsletters for tobacco traders and retailers)

(by print, we mean: newspapers and magazines for the general public, magazines on aeroplanes, trains etc., and leaflets/brochures/catalogues/flyers)

16.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no advertising permitted)

If there is a full ban, continue, otherwise go to (b)

Write in year(s) and month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some forms of advertising permitted)

If there is a partial ban/control please continue, otherwise go to (c)

Write in year(s) and
month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

17. Internet and mobile applications ('apps')

(by internet and mobile applications, we mean: sales sites, sites that give out free samples, search engines, advertising in social media (e.g. Facebook, MySpace, Tuenti), online video (e.g. YouTube), online games, applications for mobile devices, and frequently visited websites where advertising banners are found)

17.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no advertising permitted)

If there is a full ban, continue, otherwise go to (b)

Write in year(s) and month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some forms of advertising permitted)

If there is a partial ban/control please continue, otherwise go to (c)

Write in year(s) and
month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

18. Advertising outside the home

(by advertising outside the home, we mean: billboards, posters at bus-stops, advertising in sports stadia, advertising in taxis, and advertising on public transport etc.)

18.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no advertising permitted)

*If there is a full ban,
continue, otherwise go to (b)*

Write in year(s) and
month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some forms of
advertising permitted)

*If there is a partial ban/
control please continue,
otherwise go to (c)*

Write in year(s) and
month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

19. Cinema advertising

19.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no advertising permitted)

*If there is a full ban,
continue, otherwise go to (b)*

Write in year(s) and
month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some forms of
advertising permitted)

*If there is a partial ban/
control please continue,
otherwise go to (c)*

Write in year(s) and
month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

20. TV advertising

20.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no advertising permitted)

*If there is a full ban,
continue, otherwise go to (b)*

Write in year(s) and
month(s) introduced

If there is a full ban, please indicate your assessment of the current level of
compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some forms of
advertising permitted)

*If there is a partial ban/
control please continue,
otherwise go to (c)*

Write in year(s) and
month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

21. Radio advertising

21.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no advertising permitted)

*If there is a full ban,
continue, otherwise go to (b)*

Write in year(s) and
month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some forms of
advertising permitted)

*If there is a partial ban/
control please continue,
otherwise go to (c)*

Write in year(s) and
month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

22. Product placement

(by product placement, we mean manufacturers paying for their products to be featured in films and television programmes, or brand names mentioned in the likes of radio broadcasts).

22.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no product placement permitted) *If there is a full ban, continue, otherwise go to (b)*

Write in year(s) and month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some forms of product placement permitted) *If there is a partial ban/control please continue, otherwise go to (c)*

Write in year(s) and
month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

23. Products visible on display in shops, supermarkets and other retail outlets

(by visible we mean that products can be seen by customers and are not hidden behind shutters or curtains, or are not required to be stocked out of sight under a counter).

23.1 Please indicate which type of legislation currently exists in your country:

- (a) Full ban (products must not be on display) *If there is a full ban, continue, otherwise go to (b)*

Write in year(s) and month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

- (b) Partial ban/control (products are permitted to be on display in certain types of shop OR certain types of products are permitted to be on display) *If there is a partial ban/control please continue, otherwise go to (c)*

Write in year(s) and month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

24. Advertising at point of sale in shops, supermarkets and other retail outlets (add definition)

(by this we mean posters inside shops, posters on shop windows, branding on display units or vending machines, branding on other shop furniture and fittings such as clocks and change mats).

24.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no advertising permitted)

*If there is a full ban,
continue, otherwise go to (b)*

Write in year(s) and
month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (advertising is permitted in certain types of shop OR certain types of advertising is permitted)

*If there is a partial ban/
control please continue,
otherwise go to (c)*

Write in year(s) and
month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

25. Free samples, free gifts and promotional items

(by this we mean the distribution of free e-cigarette product samples, or free gifts supplied by e-cigarette manufacturers, or e-cigarette-branded promotional items, in the street, in the mail/post, at events, in restaurants/bars/discotheques and any other retail outlets).

25.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no free samples permitted)

If there is a full ban, continue, otherwise go to (b)

Write in year(s) and month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some forms of distribution of free samples are permitted)

If there is a partial ban/control please continue, otherwise go to (c)

Write in year(s) and month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

26. Sponsorship

(by this we mean financial support for cultural, sporting and other events, or for organisations. Examples could include brand name mentions on football shirts or a brand name attached to a music festival).

26.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no sponsorship permitted)

If there is a full ban, continue, otherwise go to (b)

Write in year(s) and month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some sponsorship permitted)

If there is a partial ban/control please continue, otherwise go to (c)

Write in year(s) and
month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

27. Corporate Social Responsibility actions by e-cigarette companies

(by this we mean donations, funding for research or scholarship, corporate entertaining, and any other activities carried out by companies under the heading of corporate social responsibility).

27.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no CSR permitted)

*If there is a full ban,
continue, otherwise go to (b)*

Write in year(s) and
month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some CSR
permitted)

*If there is a partial ban/
control please continue,
otherwise go to (c)*

Write in year(s) and
month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

28. Brand stretching and imitation products

(by this we mean companies producing non-e-cigarette products under their brand name, such as clothing. We are also interested in imitation products, such as tobacco companies selling e-cigarettes using the same brand name as tobacco products and which resemble tobacco products).

28.1 Please indicate which type of legislation currently exists in your country:

(a) Full ban (no brand stretching permitted)

If there is a full ban, continue, otherwise go to (b)

Write in year(s) and month(s) introduced

If there is a full ban, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(b) Partial ban/control (some brand stretching permitted for certain types of products)

If there is a partial ban/control please continue, otherwise go to (c)

Write in year(s) and
month(s) introduced

Please give details

If there is a partial ban/control, please indicate your assessment of the current level of compliance with this legislation:

High

Moderate

Low

Not sure

(c) No ban/control

(d) Not sure

*** Please provide examples of non-compliance, if you have any, by email or post ***

Section B: Competitions, Free Trials, Free Gifts and Advertising on the Internet and Mobile Applications

In this section we want to know more about four specific types of marketing for tobacco and e-cigarettes in your country: competitions and prize draws, free trial offers, free gift promotions, and advertising on internet and mobile applications.

In the case of advertising on the internet, we would like you to review what kind of advertising for these products is currently in use, by actively visiting local language social media sites in your country.

29. Competitions or Prize Draws Linked to Tobacco or E-cigarettes

29.1 To your knowledge do manufacturers run any competitions and prize draws in your country for **cigarettes and tobacco related products**?

Yes

No

Not sure

If 'yes' please provide any examples you have recently seen, describing the brand, the nature of the competition, the prize/reward and where it was marketed etc.

Tobacco example(s):

29.2 To your knowledge do manufacturers run any competitions and prize draws in your country for **e-cigarettes**?

Yes

No

Not sure

If 'yes' please provide any examples you have recently seen, describing the brand, the nature of the competition, the prize/reward and where it was marketed etc.

E-cigarette example(s):

30. Free Trial of Tobacco/E-cigarettes Products

30.1 To your knowledge do manufacturers give out free trial products or provide offers to send away for free trial products in your country for **cigarettes and tobacco related products?**

Yes

No

Not sure

If 'yes' can you provide any examples you have recently seen describing the brand, the nature of the trial/offer and where it was marketed etc.

Tobacco example(s):

30.2 To your knowledge do manufacturers give out free trial products or provide offers to send away for free trial products in your country for **e-cigarettes?**

Yes

No

Not sure

If 'yes' can you provide any examples you have recently seen describing the brand, the nature of the trial/offer and where it was marketed etc.

E-cigarette example(s):

31. **Free Gifts**

31.1 To your knowledge do shopkeepers ever give out free gifts when people buy **cigarettes or tobacco-products**, or can people redeem free gifts for saving coupons or tokens in your country for these products?

Yes

No

Not sure

If 'yes' can you provide any examples you have recently seen describing the brand, the nature of the free gift, how the customer qualifies for the gift and where it was marketed etc.

Tobacco example(s):

31.2 To your knowledge do shopkeepers ever give out free gifts when people buy **e-cigarettes**, or can people redeem free gifts for saving coupons or tokens in your country for these products?

Yes

No

Not sure

If 'yes' can you provide any examples you have recently seen describing the brand, the nature of the free gift, how the customer qualifies for the gift and where it was marketed etc.

E-cigarette example(s):

32. Internet and Mobile Applications

32.1 What are the four most popular local language social networking sites in your country?
Please consult independent national data on usage of social media, if these data exist. If there are no national data, the ‘Social Media Guide’ for your country at <http://businessculture.org> may be helpful. Please indicate in the box below how you made the selection of websites.

Site 1:	
Site 2:	
Site 3:	
Site 4:	
Please describe how you made the selection of the four sites (ie. did you consult a data source, and if so, what was it?):	

32.2 For each social networking site, please provide a brief overview of the **cigarette and tobacco related advertising** and brand related messages that currently appear on the site, including links to any examples. *If none found please write 'NONE'*

<u>Tobacco Marketing</u>
Site 1:
Site 2:
Site 3:
Site 4:

32.3 For each social networking site, please provide a brief overview of the **e-cigarette advertising** and brand related messages that currently appear on the site, including links to any examples. *If none found please write 'NONE'*

<u>E-cigarette Marketing</u>
Site 1:
Site 2:
Site 3:
Site 4:

Section C: Point of Sale Displays

In this section we want to know more about point of sale displays in your country, and the use of marketing in shops and places where tobacco products and e-cigarettes are sold. To provide a more reliable profile of point of sale marketing activity it will be necessary to visit retail outlets before completing these questions, or to seek wider opinion on these issues from people who frequent these types of outlet.

Cigarettes and Tobacco Related Products

Thinking about the selling of **tobacco and tobacco related products**, please answer the following set of questions for each retail category

Supermarkets

33. Do supermarkets in your country sell cigarettes and tobacco related products?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are tobacco products hidden from customer view...					
Are tobacco products displayed in purpose designed cabinets...					
Are tobacco products visible from outside the store...					
Are tobacco products positioned next to confectionery displays...					

Is advertising for tobacco products seen on the outside of the store (e.g. posters in shop windows and on street signs)...					
Is advertising for tobacco seen on tobacco gantries or shelves...					
Is advertising and marketing for tobacco seen in other parts of the store (e.g. wall posters, leaflet displays, counter change mats, branded fixtures and fittings)...					
Do shop assistants ask customers if they want to buy cigarettes/tobacco...					

Convenience Stores / Mini-marts

34. Do convenience stores/mini-marts in your country sell cigarettes and tobacco related products?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are tobacco products hidden from customer view...					
Are tobacco products displayed in purpose designed cabinets...					
Are tobacco products visible from outside the store...					
Are tobacco products positioned next to confectionery displays...					

Is advertising for tobacco products seen on the outside of the store (e.g. posters in shop windows and on street signs)...					
Is advertising for tobacco seen on tobacco gantries or shelves...					
Is advertising and marketing for tobacco seen in other parts of the store (e.g. wall posters, leaflet displays, counter change mats, branded fixtures and fittings)...					
Do shop assistants ask customers if they want to buy cigarettes/tobacco...					

Petrol Stations / Gas Stations

35. Do petrol stations / gas stations in your country sell cigarettes and tobacco related products?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are tobacco products hidden from customer view...					
Are tobacco products displayed in purpose designed cabinets...					
Are tobacco products visible from outside the store...					
Are tobacco products positioned next to confectionery displays...					
Is advertising for tobacco products seen on the outside of the store (e.g. posters in shop windows and on street signs)...					
Is advertising for tobacco seen on tobacco gantries or shelves...					
Is advertising and marketing for tobacco seen in other parts of the store (e.g. wall posters, leaflet displays, counter change mats, branded fixtures and fittings)...					
Do shop assistants ask customers if they want to buy cigarettes/tobacco...					

Cafes / Bars

36. Do cafes / bars in your country sell cigarettes and tobacco related products?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are tobacco products hidden from customer view...					
Are tobacco products displayed in purpose designed cabinets...					
Are tobacco products visible from outside the café / bar...					
Are tobacco products positioned next to confectionery displays...					
Is advertising for tobacco products seen on the outside of the café/ bar (e.g. posters in windows and on street signs)...					
Is advertising for tobacco seen on tobacco gantries or shelves...					
Is advertising and marketing for tobacco seen in other parts of the café / bar (e.g. wall posters, leaflet displays, counter change mats, branded fixtures and fittings)...					
Do bartenders / waiters ask customers if they want to buy cigarettes/tobacco...					

Off-licences / Liquor Stores / Alcohol Stores

37. Do off-licences / liquor stores / alcohol stores in your country sell cigarettes and tobacco related products?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are tobacco products hidden from customer view...					
Are tobacco products displayed in purpose designed cabinets...					
Are tobacco products visible from outside the store...					
Are tobacco products positioned next to confectionery displays...					
Is advertising for tobacco products seen on the outside of the store (e.g. posters in shop windows and on street signs)...					
Is advertising for tobacco seen on tobacco gantries or shelves...					
Is advertising and marketing for tobacco seen in other parts of the store (e.g. wall posters, leaflet displays, counter change mats, branded fixtures and fittings)...					
Do shop assistants ask customers if they want to buy cigarettes/tobacco...					

Fast Food / Take-away Food Shops and Restaurants

38. Do fast food / take-away food shops in your country sell cigarettes and tobacco related products?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are tobacco products hidden from customer view...					
Are tobacco products displayed in purpose designed cabinets...					
Are tobacco products visible from outside the store...					
Are tobacco products positioned next to confectionery displays...					
Is advertising for tobacco products seen on the outside of the store (e.g. posters in shop windows and on street signs)...					
Is advertising for tobacco seen on tobacco gantries or shelves...					
Is advertising and marketing for tobacco seen in other parts of the store (e.g. wall posters, leaflet displays, counter change mats, branded fixtures and fittings)...					
Do shop assistants ask customers if they want to buy cigarettes/tobacco...					

Newsagents / Confectionery / Sweet / Candy Stores

39. Do newsagents / confectionery / sweet / candy stores in your country sell cigarettes and tobacco related products?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are tobacco products hidden from customer view...					
Are tobacco products displayed in purpose designed cabinets...					
Are tobacco products visible from outside the store...					
Are tobacco products positioned next to confectionery displays...					
Is advertising for tobacco products seen on the outside of the store (e.g. posters in shop windows and on street signs)...					
Is advertising for tobacco seen on tobacco gantries or shelves...					
Is advertising and marketing for tobacco seen in other parts of the store (e.g. wall posters, leaflet displays, counter change mats, branded fixtures and fittings)...					
Do shop assistants ask customers if they want to buy cigarettes/tobacco...					

Tobacconist (main business is sale of tobacco products and tobacco related accessories)

40. Do you have tobacconist in your country specialising in selling cigarettes and tobacco related products?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are tobacco products hidden from customer view...					
Are tobacco products displayed in purpose designed cabinets...					
Are tobacco products visible from outside the store...					
Are tobacco products positioned next to confectionery displays...					
Is advertising for tobacco products seen on the outside of the store (e.g. posters in shop windows and on street signs)...					
Is advertising for tobacco seen on tobacco gantries or shelves...					
Is advertising and marketing for tobacco seen in other parts of the store (e.g. wall posters, leaflet displays, counter change mats, branded fixtures and fittings)...					
Do shop assistants ask customers if they want to buy cigarettes/tobacco...					

Self-service Vending Machines

41. Are cigarettes and tobacco related products sold from self-service vending machines in your country either in the street or in commercial premises?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are the tobacco vending machines hidden from customer view...					
Are the tobacco products for sale in the vending machines hidden from customer view...					
Are the vending machines selling tobacco products positioned next to confectionery for sale...					
Is advertising for tobacco products seen on the outside of these vending machines...					
Are there photographs or illustrations of tobacco products on the outside of these vending machines...					
Are the vending machines located in public spaces which can be accessed by young people...					
Are there age controls to prevent or discourage young people from using the vending machines? (please write in the types of controls, eg. Sign or notice):					

Outdoor Kiosks or Mobile Shops / Vans

42. Do outdoor kiosks or mobile shops / vans in your country sell cigarettes and tobacco related products?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are tobacco products hidden from customer view...					
Are tobacco products displayed in purpose designed cabinets...					
Are tobacco products visible from outside the kiosk/mobile shop...					
Are tobacco products positioned next to confectionery displays...					
Is advertising for tobacco products seen on the outside of the kiosk/mobile shop (e.g. street signs and posters von the side of the kiosk/mobile shop)...					
Is advertising for tobacco seen on tobacco gantries or shelves...					
Is advertising and marketing for tobacco seen in other parts of kiosk/mobile shop (e.g. wall posters, leaflet displays, counter change mats, branded fixtures and fittings)...					
Do shop assistants ask customers if they want to buy cigarettes/tobacco...					

Street Markets

43. Do street markets in your country sell cigarettes and tobacco related products?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are tobacco products hidden from customer view...					
Are tobacco products displayed in purpose designed cabinets...					
Are tobacco products positioned next to confectionery displays...					
Is advertising for tobacco products seen on the outside of the stand (e.g. hanging posters and street signs)...					
Is advertising for tobacco seen on tobacco gantries or shelves...					
Do street sellers ask customers if they want to buy cigarettes/tobacco...					

Other

44. Any other places in your country sell cigarettes and tobacco related products?

Yes

No

Not sure

Please type in what other in box below:

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are tobacco products hidden from customer view...					
Are tobacco products displayed in purpose designed cabinets...					
Are tobacco products visible from outside the place...					
Are tobacco products positioned next to confectionery displays...					
Is advertising for tobacco products seen on the outside of the place (e.g. posters in shop windows and on street signs)...					
Is advertising for tobacco seen on tobacco gantries or shelves...					
Is advertising and marketing for tobacco seen in other parts of the place (e.g. wall posters, leaflet displays, counter change mats, branded fixtures and fittings)...					
Do shop assistants ask customers if they want to buy cigarettes/tobacco...					

E-cigarettes

Thinking about the selling **e-cigarettes and related accessories**, please answer the following set of questions for each retail category

Supermarkets

45. Do supermarkets in your country sell e-cigarettes and related accessories?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are e-cigarette products hidden from customer view...					
Are e-cigarette products displayed in purpose designed cabinets...					
Are e-cigarette products visible from outside the store...					
Are e-cigarette products positioned next to confectionery displays...					
Is advertising for e-cigarette products seen on the outside of the store (e.g. posters in shop windows and on street signs)...					
Is advertising for e-cigarette products seen on e-cigarette gantries or shelves...					
Is advertising and marketing for e-cigarette products seen in other parts of the store (e.g. wall posters, leaflet displays, counter change mats, branded fixtures and fittings)...					
Do shop assistants ask customers if they want to buy e-cigarettes...					

Convenience Stores / Mini-marts

46. Do convenience stores/mini-marts in your country sell e-cigarettes and related accessories?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are e-cigarette products hidden from customer view...					
Are e-cigarette products displayed in purpose designed cabinets...					
Are e-cigarette products visible from outside the store...					
Are e-cigarette products positioned next to confectionery displays...					
Is advertising for e-cigarette products seen on the outside of the store (e.g. posters in shop windows and on street signs)...					
Is advertising for e-cigarette products seen on e-cigarette gantries or shelves...					
Is advertising and marketing for e-cigarette products seen in other parts of the store (e.g. wall posters, leaflet displays, counter change mats, branded fixtures and fittings)...					
Do shop assistants ask customers if they want to buy e-cigarettes...					

Petrol Stations / Gas Stations

47. Do petrol stations / gas stations in your country sell e-cigarettes and related accessories?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are e-cigarette products hidden from customer view...					
Are e-cigarette products displayed in purpose designed cabinets...					
Are e-cigarette products visible from outside the store...					
Are e-cigarette products positioned next to confectionery displays...					
Is advertising for e-cigarette products seen on the outside of the store (e.g. posters in shop windows and on street signs)...					
Is advertising for e-cigarette products seen on e-cigarette gantries or shelves...					
Is advertising and marketing for e-cigarette products seen in other parts of the store (e.g. wall posters, leaflet displays, counter change mats, branded fixtures and fittings)...					
Do shop assistants ask customers if they want to buy e-cigarettes...					

Cafes / Bars

48. Do cafes / bars in your country sell e-cigarettes and related accessories?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are e-cigarette products hidden from customer view...					
Are e-cigarette products displayed in purpose designed cabinets...					
Are e-cigarette products visible from outside the café/bar...					
Are e-cigarette products positioned next to confectionery displays...					
Is advertising for e-cigarette products seen on the outside of the café/bar (e.g. posters in shop windows and on street signs)...					
Is advertising for e-cigarette products seen on e-cigarette gantries or shelves...					
Is advertising and marketing for e-cigarette products seen in other parts of the café/bar (e.g. wall posters, leaflet displays, counter change mats, branded fixtures and fittings)...					
Do shop assistants ask customers if they want to buy e-cigarettes...					

Off-licences / Liquor Stores / Alcohol Stores

49. Do off-licences / liquor stores / alcohol stores in your country sell e-cigarettes and related accessories?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are e-cigarette products hidden from customer view...					
Are e-cigarette products displayed in purpose designed cabinets...					
Are e-cigarette products visible from outside the store...					
Are e-cigarette products positioned next to confectionery displays...					
Is advertising for e-cigarette products seen on the outside of the store (e.g. posters in shop windows and on street signs)...					
Is advertising for e-cigarette products seen on e-cigarette gantries or shelves...					
Is advertising and marketing for e-cigarette products seen in other parts of the store (e.g. wall posters, leaflet displays, counter change mats, branded fixtures and fittings)...					
Do shop assistants ask customers if they want to buy e-cigarettes...					

Fast Food / Take-away Food Shops and Restaurants

50. Do fast food / take-away food shops in your country sell e-cigarettes and related accessories?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are e-cigarette products hidden from customer view...					
Are e-cigarette products displayed in purpose designed cabinets...					
Are e-cigarette products visible from outside the store...					
Are e-cigarette products positioned next to confectionery displays...					
Is advertising for e-cigarette products seen on the outside of the store (e.g. posters in shop windows and on street signs)...					
Is advertising for e-cigarette products seen on e-cigarette gantries or shelves...					
Is advertising and marketing for e-cigarette products seen in other parts of the store (e.g. wall posters, leaflet displays, counter change mats, branded fixtures and fittings)...					
Do shop assistants ask customers if they want to buy e-cigarettes...					

Newsagents / Confectionery / Sweet / Candy Stores

51. Do newsagents / confectionery / sweet / candy stores in your country sell e-cigarettes and related accessories?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are e-cigarette products hidden from customer view...					
Are e-cigarette products displayed in purpose designed cabinets...					
Are e-cigarette products visible from outside the store...					
Are e-cigarette products positioned next to confectionery displays...					
Is advertising for e-cigarette products seen on the outside of the store (e.g. posters in shop windows and on street signs)...					
Is advertising for e-cigarette products seen on e-cigarette gantries or shelves...					
Is advertising and marketing for e-cigarette products seen in other parts of the store (e.g. wall posters, leaflet displays, counter change mats, branded fixtures and fittings)...					
Do shop assistants ask customers if they want to buy e-cigarettes...					

Pharmacies / shops where you can buy medicine

52. Do pharmacies / shops where you can buy medicine in your country sell e-cigarettes and related accessories?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are e-cigarette products hidden from customer view...					
Are e-cigarette products displayed in purpose designed cabinets...					
Are e-cigarette products visible from outside the store...					
Are e-cigarette products positioned next to confectionery displays...					
Are any e-cigarette products displayed next to conventional nicotine replacement therapy (NRT) products?					
Is advertising for e-cigarette products seen on the outside of the store (e.g. posters in shop windows and on street signs)...					
Is advertising for e-cigarette products seen on e-cigarette gantries or shelves...					
Is advertising and marketing for e-cigarette products seen in other parts of the store (e.g. wall posters, leaflet displays, counter change mats, branded fixtures and fittings)...					
Do shop assistants ask customers if they want to buy e-cigarettes...					

Specialist E-cigarette Shops (main business is sale of e-cigarette products, vaporisers and accessories)

53. Do you have specialist shops in your country dedicated to selling e-cigarettes, vaporisers and related accessories?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are e-cigarette products hidden from customer view...					
Are e-cigarette products displayed in purpose designed cabinets...					
Are e-cigarette products visible from outside the store...					
Are e-cigarette products positioned next to confectionery displays...					
Is advertising for e-cigarette products seen on the outside of the store (e.g. posters in shop windows and on street signs)...					
Is advertising for e-cigarette products seen on e-cigarette gantries or shelves...					
Is advertising and marketing for e-cigarette products seen in other parts of the store (e.g. wall posters, leaflet displays, counter change mats, branded fixtures and fittings)...					
Do shop assistants ask customers if they want to buy e-cigarettes...					

Self-service Vending Machines

54. Are e-cigarettes and related accessories sold from self-service vending machines in your country either in the street or in commercial premises?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are the e-cigarette vending machines hidden from customer view					
Are the e-cigarette products for sale in the vending machines hidden from customer view...					
Are the vending machines selling e-cigarette products positioned next to confectionery for sale					
Is advertising for e-cigarette products seen on the outside of these vending machines...					
Are there photographs or illustrations of e-cigarette products on the outside of these vending machines...					
Are the vending machines located in public spaces which can be accessed by young people					
Are there age controls to prevent or discourage young people from using the vending machines? (please write in the types of controls, e.g. Sign or notice)					

Outdoor Kiosks or Mobile Shops / Vans

55. Do outdoor kiosks or mobile shops / vans in your country e-cigarettes and related accessories?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are e-cigarette products hidden from customer view...					
Are e-cigarette products displayed in purpose designed cabinets...					
Are e-cigarette products visible from outside the kiosk/mobile shop...					
Are e-cigarette products positioned next to confectionery displays...					
Is advertising for e-cigarette products seen on the outside of the store (e.g. street signs and posters on the side of the kiosk/mobile shop)...					
Is advertising for e-cigarette products seen on e-cigarette gantries or shelves...					
Is advertising and marketing for e-cigarette products seen in other parts of kiosk/mobile shop (e.g. wall posters, leaflet displays, counter change mats, branded fixtures and fittings)...					
Do shop assistants ask customers if they want to buy e-cigarettes...					

Street Markets

56. Do street markets in your country sell e-cigarettes and related accessories?

Yes

No

Not sure

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are e-cigarette products hidden from customer view...					
Are e-cigarette products displayed in purpose designed cabinets...					
Are e-cigarette products positioned next to confectionery displays...					
Is advertising for e-cigarette products seen on the outside of the stand (e.g. hanging posters and street signs)...					
Is advertising for e-cigarette products seen on tobacco gantries or shelves...					
Do street sellers ask customers if they want to buy e-cigarettes products...					

Other

57. Any other places in your country sell e-cigarettes and related accessories?

Yes

No

Not sure

Please type in what other in box below:

If yes:

Please chose one response for each line, marking with 'x'

	A lot of the time	Occasionally	Very rarely	Never	Not relevant
Are e-cigarette products hidden from customer view...					
Are e-cigarette products displayed in purpose designed cabinets...					
Are e-cigarette products visible from outside the place...					
Are e-cigarette products positioned next to confectionery displays...					
Is advertising for e-cigarette products seen on the outside of the place (e.g. posters in shop windows and on street signs)...					
Is advertising for e-cigarette products seen on tobacco gantries or shelves...					
Is advertising and marketing for e-cigarette products seen in other parts of the place (e.g. wall posters, leaflet displays, counter change mats, branded fixtures and fittings)...					
Do shop assistants ask customers if they want to buy e-cigarettes products...					

Section D: Additional Information

- 58.** Please forward copies of any reports or studies in your own country providing an assessment of level of compliance with existing legislation limiting the marketing of tobacco.
- 59.** Please forward copies of any reports or studies in your own country relating to the **marketing of e-cigarette and/or tobacco related products on social media**

Please provide the following details for each publication - title, source and date of publication:

- 60.** Please forward copies of any reports or studies in your own country relating to the **selling of cigarettes to under-age minors, or to the purchase of cigarettes by under-age minors**

Please provide the following details for each publication - title, source and date of publication:

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doi:10.2818/7898