



# Special Eurobarometer 482

## Summary

### Public perception of illicit tobacco trade

Fieldwork  
December 2018  
Publication  
July 2019

Survey requested by the European Commission,  
European Anti-Fraud Office  
and co-ordinated by the Directorate-General for Communication

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

Special Eurobarometer 482 – Wave EB90.4 – Kantar



# Special Eurobarometer 482

## Summary

### Public perception of illicit tobacco trade

December 2018

Survey conducted by Kantar on behalf of Kantar Belgium  
at the request of the European Commission, European Anti-Fraud Office

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

Project title

Special Eurobarometer 482 – December 2018  
“Public perception of illicit tobacco trade”

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Summary  
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<http://ec.europa.eu/commfrontoffice/publicopinion>

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## INTRODUCTION

The illicit tobacco trade continues to be a major concern for the European Union and its Member States. It is harmful to the well-being of our society in many ways, e.g. fiscal, health and security. The illicit trade in tobacco is dominated by organised crime gangs and causes a loss to public revenues of the EU and Member States of about €10 billion every year.

The first EU Strategy to tackle this phenomenon was issued in 2013<sup>1</sup> and supplemented by an Action Plan (2013-2017)<sup>2</sup>. In 2016 and 2017 stock-taking exercises took place including a Progress Report from the European Commission<sup>3</sup>, which largely matched the related Council Conclusions from Member States of December 2016. The findings of a public conference involving a wide range of stakeholders (e.g. European Commission, European Parliament, European Economic & Social Committee<sup>4</sup>, NGOs, enforcement services, academics and industry) in March 2018 generally supported the conclusions of the Progress Report.

The findings from the evaluation phase led to three main conclusions namely that the threat from the illicit tobacco trade is still present, the 2013 Strategy remains valid and a need to up-date the tools to keep-up with the ever-changing threat from the illicit tobacco trade. A 2<sup>nd</sup> Action Plan<sup>5</sup>, based on these conclusions, was adopted by the European Commission in December 2018. It sets out 50 actions to be implemented individually and jointly by the EU or Member States, before the end of 2022. The actions focus on engaging leading sources and transit countries; limiting supply; enhancing analyses & intelligence; as well as limiting demand. One action<sup>6</sup> aimed at limiting demand is to follow-up the first survey on the public perception of illicit tobacco trade conducted in 2015 (Special Eurobarometer 443 of July 2016).

At the Stakeholder Conference in March 2018 the observation was made, for example, that the demand for black market cigarettes would likely fall if the public knew of the direct link to organised crime. Yet, it was recognised that the public was to some extent unaware of this link, as shown by the first Eurobarometer survey (Special Eurobarometer 443) on public perceptions of the illicit tobacco trade in 2015.

The current survey updates the results of the survey in 2015, focusing on the following topics:

- The penetration of the black market for cigarettes, and locations where transactions take place;
- The price difference between black market and legal cigarettes;
- The public's ability to distinguish black market cigarettes from legal cigarettes;
- Reasons for smoking black market cigarettes;
- Views on the main problems of the black market in cigarettes;
- Perceptions of the key revenue sources of organised crime groups.

The findings of the current survey are public. It will furthermore be shared with Member States experts involved in fighting the illicit tobacco trade and other stakeholders. To encourage the use of the findings of this survey another Action<sup>7</sup> in the 2<sup>nd</sup> Action Plan foresees the providing of *a platform allowing Member States to exchange good practices with awareness raising campaigns focussing on the risks associated with buying illicit tobacco products*. The aim is that the findings of the survey will support follow-up awareness activities at national level.

<sup>1</sup> COM(2013) 324 final of 6 June 2013

<sup>2</sup> SWD(2013) 324 final of 6 June 2013

<sup>3</sup> COM(2017) 235 final of 12 May 2017

<sup>4</sup> <https://www.eesc.europa.eu/en/agenda/our-events/events/fighting-illicit-tobacco>

<sup>5</sup> COM(2018) 846 final of 7 December 2018

<sup>6</sup> Action C1.1

<sup>7</sup> Action C1.2

This survey was carried out by the Kantar network in the 28 EU Member States between the 4<sup>th</sup> and 20<sup>th</sup> of December 2018. Some 27,643 respondents from different social and demographic groups were interviewed face-to-face at home in their mother tongue. The survey was commissioned by the European Anti-Fraud Office (OLAF).

The methodology used is that of the Standard Eurobarometer surveys carried out by the Directorate-General for Communication (“Media monitoring and Eurobarometer” Unit)<sup>8</sup>. It is the same for all countries and territories covered in the survey. A technical note on the manner in which interviews were conducted is appended as an annex to this report. Also included are the interview methods and confidence interval<sup>9</sup>.

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

|  |      |                 |      |
|--|------|-----------------|------|
| Belgium  | BE   | Lithuania       | LT   |
| Bulgaria   | BG   | Luxembourg      | LU   |
| Czechia  | CZ   | Hungary         | HU   |
| Denmark  | DK   | Malta           | MT   |
| Germany  | DE   | The Netherlands | NL   |
| Estonia  | EE   | Austria         | AT   |
| Ireland  | IE   | Poland          | PL   |
| Greece   | EL   | Portugal        | PT   |
| Spain  | ES   | Romania         | RO   |
| France   | FR   | Slovenia        | SI   |
| Croatia  | HR   | Slovakia        | SK   |
| Italy  | IT   | Finland         | FI   |
| Republic of Cyprus   | CY * | Sweden          | SE   |
| Latvia   | LV   | United Kingdom  | UK   |
| European Union – weighted average for the 28 Member States |      |                 | EU28 |

\* Cyprus as a whole is one of the 28 European Union Member States. However, the ‘acquis communautaire’ has been suspended in the part of the country which is not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews carried out in the part of the country controlled by the government of the Republic of Cyprus are included in the ‘CY’ category and in the EU28 average.

*We wish to thank the people throughout the European Union*

*who have given their time to take part in this survey.*

*Without their active participation, this study would not have been possible.*

<sup>8</sup> <http://ec.europa.eu/commfrontoffice/publicopinion>

<sup>9</sup> The results tables are annexed. It should be noted that the total of the percentages indicated in the tables in this report may exceed 100% when the respondent was able to choose several answers to the same question.

## KEY FINDINGS

### **The loss of taxes for the state and revenue for organised crime are seen as the main problems of the black market in cigarettes**

- The loss of taxes for the state is seen as one of the main problems of the black market in cigarettes (40%), while 38% mention revenue for organised crime, 33% the lack of quality control of these cigarettes, and 28% that it encourages smoking among young people by making cigarettes cheaper and easier to obtain.
- Results have remained broadly consistent with those seen in the 2015 survey.

### **Only a minority mention black market cigarettes as an important source of revenue for organised crime**

- Around seven in ten respondents (71%) think that illegal drugs are one of the most important sources of revenue for organised crime, followed by prostitution and human trafficking (42%). Only 15% respondents mentioned black market cigarettes as one of the most important sources of revenue.
  - The proportion mentioning black market cigarettes as an important source of revenue for organised crime has remained stable since 2015.

### **The low price is by far the main reason for smoking black market cigarettes**

- The low price is the most commonly mentioned reason for smoking black market cigarettes (75%), well ahead of the answer 'easy availability' (9%). While there is no change compared to the survey in 2015 at EU level, large increases can be observed in some Member States (e.g. the Netherlands, +31 pp).

### **Black market cigarettes are said to be at least 30% to 50% cheaper than legal cigarettes**

- Among those who have been offered black market cigarettes, more than a third (37%) responded that they were at least 50% cheaper than legal cigarettes, and the same proportion (37%) said they were at least 30% cheaper.

### **The overall penetration of black market cigarettes has slightly decreased**

- 17% of the respondents say that they have been offered black market cigarettes, including 2% who say that they are offered black market cigarettes at least once a week, 4% who are offered them once to three times a month, and 11% less than once a month.
  - The overall proportion that has ever been offered black market cigarettes has slightly decreased since 2015 (-2 pp).

### **Black market cigarettes are most likely to be offered on the street**

- Around two third of respondents who have been offered black market cigarettes (67%) say they were offered them in the street. Respondents were less likely to have been offered them in a restaurant or bar (14%) or in a shop under the counter (10%).

### **Only a minority are confident that they could identify a packet of black market cigarettes**

- Less than a third (31%) of all respondents are confident that they would be able to distinguish a packet of black market cigarettes from a legal packet, while the majority (58%) are not confident.

## I. PENETRATION OF THE BLACK MARKET IN CIGARETTES

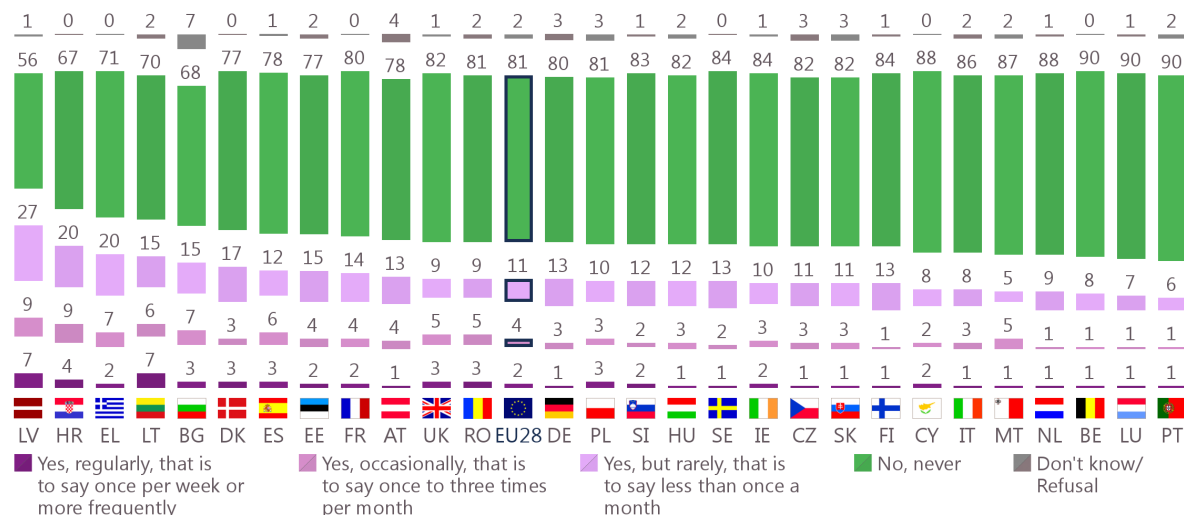
### One in six Europeans have been offered black market cigarettes

One in six Europeans (17%) say that they have been offered black market cigarettes to buy or smoke<sup>10</sup>. This includes 2% who say they are offered black market cigarettes regularly (at least once a week), 4% who have been offered them occasionally (once to three times per month) and 11% who say this happens rarely (less than once a month). Around eight in ten respondents (81%) say that they have never been offered black market cigarettes, while the remaining 2% either don't know or refused to answer.

These findings are similar to those observed in the 2015 survey, although there has been a slight decrease in the overall penetration of black market cigarettes (-2 percentage points); specifically, a lower proportion say they are offered black market cigarettes 'rarely' (-2 pp), while there has been a corresponding rise in the proportion who say they have never been offered them (+2 pp).

There is considerable variation by country in the penetration of black market cigarettes. Respondents in Latvia (43%) are the most likely to say that they have ever been offered black market cigarettes, as have at least a quarter of respondents in Croatia (33%), Greece (29%), Lithuania (28%) and Bulgaria (25%). By contrast, no more than one in ten respondents say that they have been offered cigarettes from the black market in Portugal (8%), Luxembourg (9%) and Belgium (10%).

**QB3** Have you ever been offered black market cigarettes to buy or smoke? (%)



<sup>10</sup> QB3: Have you ever been offered black market cigarettes to buy or smoke? No, never; Yes, but rarely, that is to say less than once a month; Yes, occasionally, that is to say once to three times per month; Yes, regularly, that is to say once per week or more frequently; Refusal (spontaneous); Don't know.



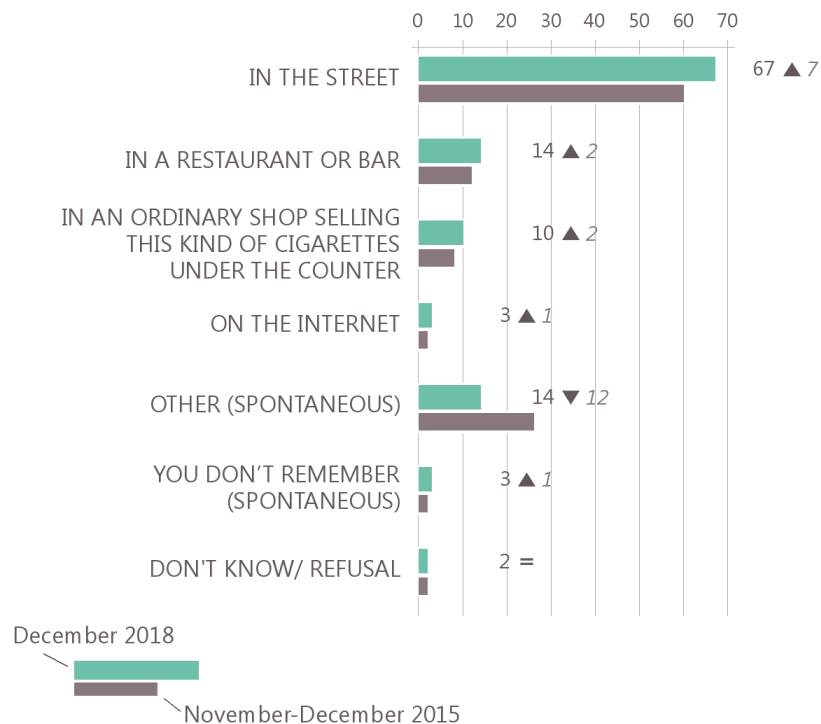
## II. WHERE DO CONSUMERS GET THEIR BLACK MARKET CIGARETTES?

### Black market cigarettes are most likely to be offered in the street

Among respondents who said that they have ever been offered black market cigarettes, two thirds say they were offered them in the street (67%)<sup>11</sup>. One in seven (14%) say they were offered them in a restaurant or bar, and one in ten (10%) in an ordinary shop selling them under the counter. Only a very small proportion of these respondents say they were offered black market cigarettes on the Internet (3%), while one in seven (14%) say they were offered them somewhere else.

Compared with the 2015 survey, respondents in the current survey are more likely to say they were offered black market cigarettes in the street (+7 percentage points) and are less likely to mention 'other' locations (-12 pp).

**QB4** Where were you offered this type of cigarettes?  
(MULTIPLE ANSWERS POSSIBLE)  
(% - EU)



Base: respondents who were offered black market cigarettes (n=4,713)

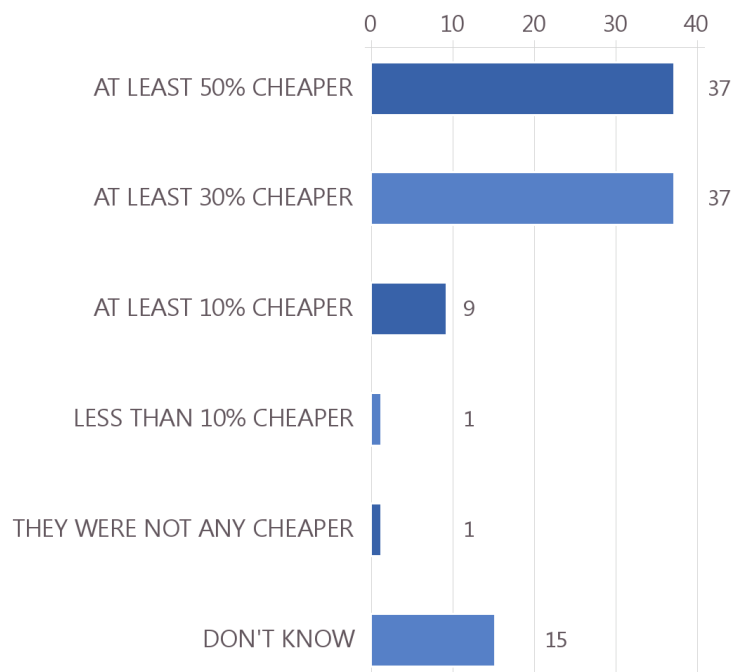
<sup>11</sup> QB4: Where were you offered this type of cigarettes? (Multiple answers possible) On the Internet; In an ordinary shop selling this kind of cigarettes under the counter; In the street; In a restaurant or bar; Other (SPONTANEOUS); You don't remember (SPONTANEOUS); Refusal (SPONTANEOUS); Don't know.

### III. BLACK MARKET CIGARETTES VS LEGAL CIGARETTES: PRICE DIFFERENCE

#### Three in four respondents say that black market cigarettes were at least 30% cheaper than legal cigarettes

Respondents who said they had been offered cigarettes on the black market were asked how much cheaper (if at all) they were than legal cigarettes<sup>12</sup>. More than a third (37%) say that the cigarettes they were offered were at least 50% cheaper than legal cigarettes, while the same proportion (37%) say that they were at least 30% cheaper. Less than one in ten (9%) say that they were at least 10% cheaper, while 1% say the difference was less than 10%, and 1% that there was no difference at all. The remaining 15% do not know.

**QB5** Approximately how much cheaper, if at all, were the black market cigarettes offered to you compared to legal cigarettes?  
(% - EU)



Base: respondents who were offered black market cigarettes (n=4,713)

<sup>12</sup> QB5: Approximately how much cheaper, if at all, were the black market cigarettes offered to you compared to legal cigarettes? At least 50% cheaper; At least 30% cheaper; At least 10% cheaper; Less than 10% cheaper; They were not any cheaper; Don't know.

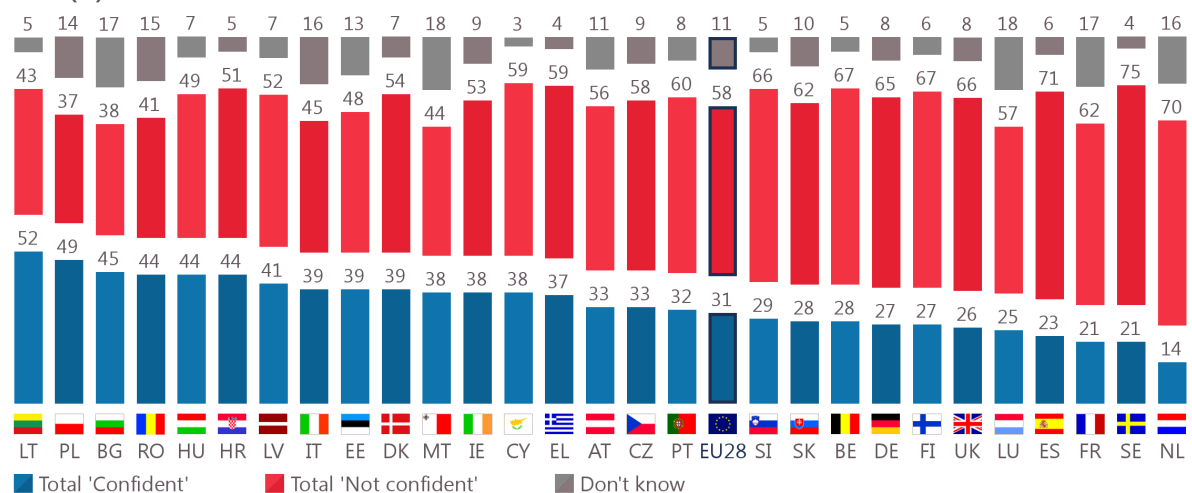
#### IV. BLACK MARKET CIGARETTES VS LEGAL CIGARETTES: ABILITY TO DISTINGUISH THE PACKETS

##### Most Europeans are not confident that they could distinguish a packet of black market cigarettes from a legal packet

Just under a third of European (31%) say that they would be confident in being able to distinguish a packet of black market cigarettes from a legal packet, and this includes 12% who say they would be very confident<sup>13</sup>. However, the majority (58%) say they would not be confident, including 39% who would not be at all confident.

Lithuania is the only country where a majority of respondents (52%) say that they would be confident in being able to distinguish a packet of black market cigarettes from a legal packet. The proportion is also high in Poland (49%), Bulgaria (45%), and Romania, Croatia and Hungary (all 44%). Less than a quarter of respondents say they would be confident in the Netherlands (14%), Sweden and France (both 21%) and Spain (23%).

**QB6** How confident or not are you that you would be able to distinguish a packet of black market cigarettes from a legal packet. (%)



<sup>13</sup> QB6: How confident or not are you that you would be able to distinguish a packet of black market cigarettes from a legal packet. Very confident; Fairly confident; Not very confident; Not at all confident; Don't know.

## V. REASONS FOR SMOKING BLACK MARKET CIGARETTES

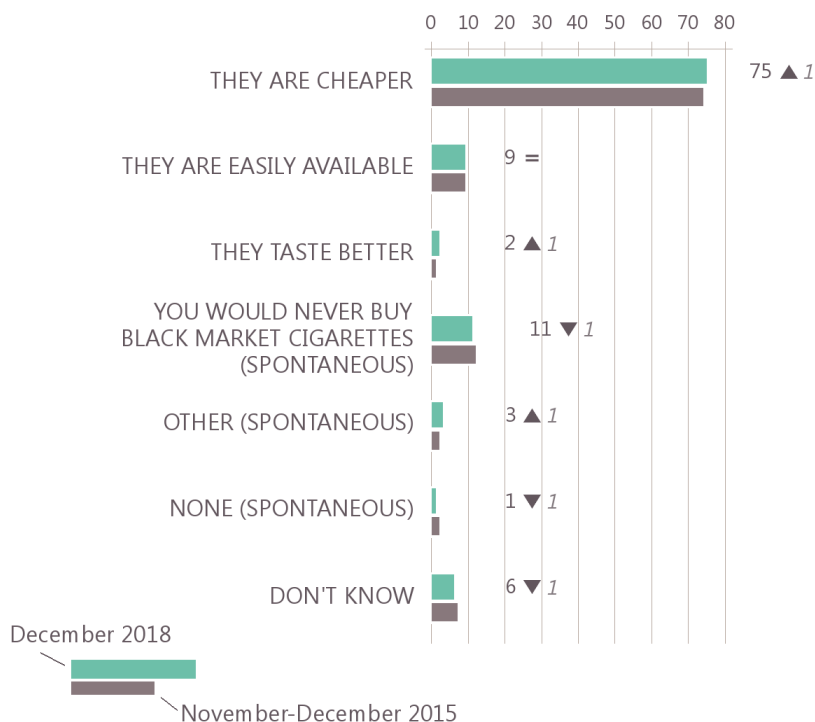
All respondents were then asked what they thought were the main reasons for smoking black market cigarettes<sup>14</sup>.

### Three in four respondents think that one of the main reasons for smoking black market cigarettes is that they are cheaper

Three quarters of respondents say that one of the main reasons for smoking black market cigarettes is that they are cheaper (75%). The second most common reason is that they are easily available, although only 9% of respondents say this. Just 2% of respondents hold the view that they taste better. It is worth noting that around one in ten respondents spontaneously say that they would never buy black market cigarettes (11%) and a further 6% are unable to give a reason.

The findings are very similar to those observed in the 2015 survey, with no changes of more than one percentage point.

**QB7** From your point of view, what are the main reasons for smoking black market cigarettes? (MAX. 2 ANSWERS)  
(% - EU)



<sup>14</sup> QB7: From your point of view, what are the main reasons for smoking black market cigarettes? They are cheaper; They taste better; They are easily available; You would never buy black market cigarettes (SPONTANEOUS); Other (SPONTANEOUS); None (SPONTANEOUS); Don't know.

## VI. MAIN SOURCES OF REVENUE FOR ORGANISED CRIME

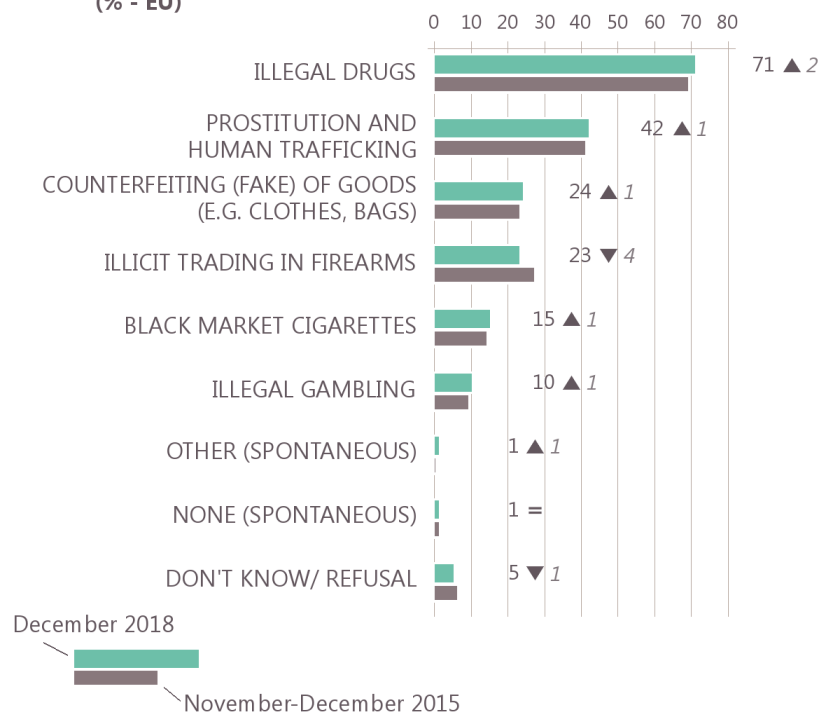
### Respondents say that the most important source of revenue for organised crime is illegal drugs

Respondents were asked what they thought are the two most important sources of revenue of organised crime<sup>15</sup>.

Around seven in ten respondents (71%) identify illegal drugs as one of the two most important sources of income for organised crime. This is followed by prostitution and human trafficking (42%), counterfeiting of goods (24%) and illicit trading in firearms (23%). Black market cigarettes are mentioned by 15% as one of the two most important sources of revenue, and illegal gambling by 10%.

Responses have remained very similar to those observed in the 2015 survey. The largest change is a decrease in the proportion mentioning illicit trading in firearms as one of the two most important sources of revenue (-4 pp). The proportion mentioning black market cigarettes has increased marginally (+1 pp).

**QB8T** Within the EU, which of the following do you think is the most important source of revenue for organised crime? And which do you think is the second most important? (MAX. 2 ANSWERS)  
(% - EU)



In three countries, more than a quarter of respondents think that **black market cigarettes** provide one of the most important sources of revenue for organised crime: Lithuania (29%), Sweden (27%) and Poland (26%). There are 16 countries showing an increase since 2015, with the largest rises seen in Finland (19%, +7 pp), Romania (19%, +6 pp) and Slovenia (11%, +6 pp).

<sup>15</sup> QB8: Within the EU, which of the following do you think is the most important source of revenue for organised crime? And which do you think is the second most important? Black market cigarettes; Counterfeiting (fake) of goods (e.g. clothes, bags); Illegal gambling; Prostitution and human trafficking; Illegal drugs; Illicit trading in firearms; Other (SPONTANEOUS); None (SPONTANEOUS); Refusal (SPONTANEOUS) Don't know.

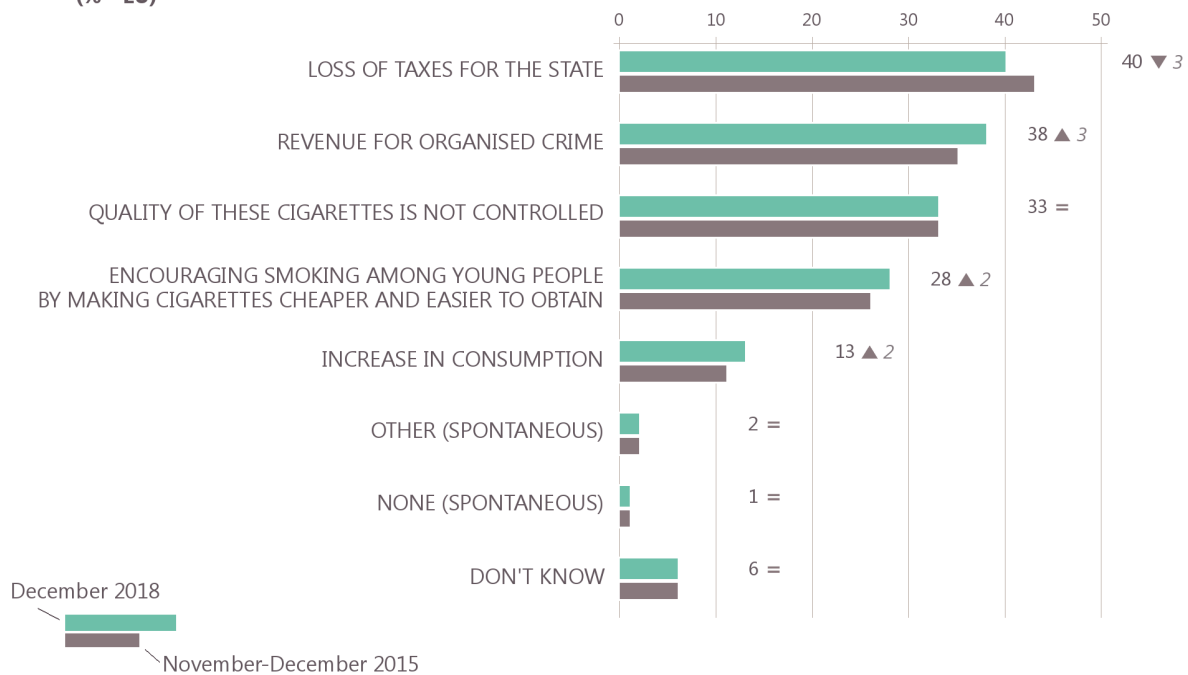
## VII. MAIN PROBLEMS OF THE BLACK MARKET IN CIGARETTES

### The loss of taxes for the state as well as revenue for organised crime are seen as the main problems of the black market in cigarettes

The loss of taxes for the state is seen as one of the main problems of the black market in cigarettes (mentioned by 40%), while a slightly smaller proportion mention revenue for organised crime (38%)<sup>16</sup>. One in three (33%) mention the lack of quality control of these cigarettes, while just over a quarter of respondents mention encouraging smoking among young people by making cigarettes cheaper and easier to obtain (28%). One in eight respondents (13%) consider the increase in consumption as one of the main problems of the black market in cigarettes.

Results have remained broadly consistent with those seen in the 2015 survey. There has been an increase in the proportion saying that revenue for organised crime is one of the main problems of the black market in cigarettes (+3 percentage points) and a decrease in the proportion mentioning loss of taxes for the state (-3 pp).

**QB9** From your point of view, what are the main problems of the black market in cigarettes? (MAX. 2 ANSWERS)  
(% - EU)



<sup>16</sup> QB9: From your point of view, what are the main problems of the black market in cigarettes? Encouraging smoking among young people by making cigarettes cheaper and easier to obtain; Loss of taxes for the state; Revenue for organised crime; Increase in consumption; Quality of these cigarettes is not controlled; Other (SPONTANEOUS); None (SPONTANEOUS); Don't know.

## CONCLUSION

This survey follows a Special Eurobarometer survey conducted in 2015 (EBS 443), and therefore provides an updated assessment of public experience and perceptions of the black market in cigarettes.

One in six Europeans say they have been offered black market cigarettes, although this rises to one in three among those who currently smoke. Geographically, black market cigarettes have the highest penetration in Latvia, Croatia, Greece, Lithuania and Bulgaria. Since 2015, there has been a slight fall in the overall proportion who have been offered black market cigarettes (-2 percentage points), and the proportion has decreased substantially in several countries, including those with high levels of penetration (such as Latvia, Bulgaria and Lithuania).

The low price is by far considered as the main reason for smoking black market cigarettes, and most of those who have been offered black market cigarettes say that they were at least 30% cheaper than legal cigarettes, with more than a third saying they were at least 50% cheaper. This is related to the analysis of the profile of people who are offered black market cigarettes, who tend to be unemployed and experience financial difficulties. This suggests that the lower price is a key factor for some people who are buying black market cigarettes.

As in 2015, the loss of taxes for the state and revenue for organised crime are seen as the main problems of the black market in cigarettes.

Only a small proportion of Europeans recognise that the black market for cigarettes is one of the key revenue sources for organised crime groups, again in line with the 2015 survey. The survey also found that the majority of respondents would not be confident in being able to distinguish a packet of black market cigarettes from a legal packet. This suggests that there is scope to increase public awareness, both of the importance of black market cigarettes to organised crime gangs, and of how these cigarettes can be identified. However, this needs to be combined with further efforts to discourage people from accepting the much lower prices that they are offered for black market cigarettes, which may be particularly attractive for people with low incomes.

December 2018

## TECHNICAL SPECIFICATIONS

Between the 4<sup>th</sup> and 20<sup>th</sup> of December 2018, Kantar carried out the wave 90.4 of the EUROBAROMETER survey, on request of the EUROPEAN COMMISSION, Directorate-General for Communication, "Media monitoring and Eurobarometer" Unit.

The wave 90.4 covers the population of the respective nationalities of the European Union Member States, resident in each of the 28 Member States and aged 15 years and over.

|    | COUNTRIES      | INSTITUTES  | N°<br>INTERVIEWS | FIELDWORK<br>DATES |            | POPULATION<br>15+ | PROPORTION<br>EU28 |
|----|----------------|---|------------------|--------------------|------------|-------------------|--------------------|
| BE | Belgium        | Kantar Belgium (Kantar TNS)                       | 1,079            | 04/12/2018         | 17/12/2018 | 9,693,779         | 2.25%              |
| BG | Bulgaria       | Kantar TNS BBSS                                   | 1,034            | 04/12/2018         | 16/12/2018 | 6,537,535         | 1.52%              |
| CZ | Czechia        | Kantar CZ   | 1,008            | 04/12/2018         | 17/12/2018 | 9,238,431         | 2.14%              |
| DK | Denmark        | Kantar Gallup                                     | 1,004            | 04/12/2018         | 19/12/2018 | 4,838,729         | 1.12%              |
| DE | Germany        | Kantar Deutschland                                | 1,526            | 04/12/2018         | 19/12/2018 | 70,160,634        | 16.26%             |
| EE | Estonia        | Kantar Emor                                       | 1,004            | 04/12/2018         | 17/12/2018 | 1,160,064         | 0.27%              |
| IE | Ireland        | Behaviour & Attitudes                             | 1,001            | 04/12/2018         | 20/12/2018 | 3,592,162         | 0.83%              |
| EL | Greece         | Taylor Nelson Sofres Market Research              | 1,016            | 05/12/2018         | 16/12/2018 | 9,937,810         | 2.30%              |
| ES | Spain          | TNS Investigación de Mercados y Opinión           | 1,007            | 05/12/2018         | 17/12/2018 | 39,445,245        | 9.14%              |
| FR | France         | Kantar Public France                              | 1,014            | 04/12/2018         | 18/12/2018 | 54,097,255        | 12.54%             |
| HR | Croatia        | Hendal  | 1,010            | 05/12/2018         | 16/12/2018 | 3,796,476         | 0.88%              |
| IT | Italy          | Kantar Italia                                     | 1,008            | 04/12/2018         | 16/12/2018 | 52,334,536        | 12.13%             |
| CY | Rep. Of Cyprus | CYMAR Market Research                             | 499              | 04/12/2018         | 16/12/2018 | 741,308           | 0.17%              |
| LV | Latvia         | Kantar TNS Latvia                                 | 1,002            | 05/12/2018         | 18/12/2018 | 1,707,082         | 0.40%              |
| LT | Lithuania      | TNS LT  | 1,007            | 04/12/2018         | 17/12/2018 | 2,513,384         | 0.58%              |
| LU | Luxembourg     | ILReS   | 501              | 04/12/2018         | 15/12/2018 | 457,127           | 0.11%              |
| HU | Hungary        | Kantar Hoffmann                                   | 1,047            | 05/12/2018         | 17/12/2018 | 8,781,161         | 2.04%              |
| MT | Malta          | MISCO International                               | 506              | 04/12/2018         | 19/12/2018 | 364,171           | 0.08%              |
| NL | Netherlands    | TNS NIPO  | 1,044            | 05/12/2018         | 17/12/2018 | 13,979,215        | 3.24%              |
| AT | Austria        | Das Österreichische Gallup Institut               | 1,033            | 04/12/2018         | 17/12/2018 | 7,554,711         | 1.75%              |
| PL | Poland         | Kantar Polska                                     | 1,011            | 05/12/2018         | 17/12/2018 | 33,444,171        | 7.75%              |
| PT | Portugal       | Marktest – Marketing, Organização e Formação      | 1,012            | 04/12/2018         | 16/12/2018 | 8,480,126         | 1.97%              |
| RO | Romania        | Centrul Pentru Studierea Opiniei si Pietei (CSOP) | 1,063            | 06/12/2018         | 16/12/2018 | 16,852,701        | 3.91%              |
| SI | Slovenia       | Mediana DOO                                       | 1,026            | 04/12/2018         | 16/12/2018 | 1,760,032         | 0.41%              |
| SK | Slovakia       | Kantar Slovakia                                   | 1,013            | 05/12/2018         | 16/12/2018 | 4,586,024         | 1.06%              |
| FI | Finland        | Kantar TNS Oy                                     | 1,030            | 04/12/2018         | 18/12/2018 | 4,747,810         | 1.10%              |
| SE | Sweden         | Kantar Sifo                                       | 1,072            | 04/12/2018         | 17/12/2018 | 7,998,763         | 1.85%              |
| UK | United Kingdom | Kantar UK Limited                                 | 1,066            | 05/12/2018         | 19/12/2018 | 52,651,777        | 12.20%             |
|    |                | TOTAL EU28  | 27,643           | 04/12/2018         | 20/12/2018 | 431,452,219       | 100%*              |

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



December 2018

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

In order to do so, the sampling points were drawn systematically from each of the "administrative regional units", after stratification by individual unit and type of area. They thus represent the whole territory of the countries surveyed according to the EUROSTAT NUTS II<sup>1</sup> (or equivalent) and according to the distribution of the resident population of the respective nationalities in terms of metropolitan, urban and rural areas.

In each of the selected sampling points, a starting address was drawn, at random. Further addresses (every Nth address) were selected by standard "random route" procedures, from the initial address. In each household, the respondent was drawn, at random (following the "closest birthday rule"). All interviews were conducted face-to-face in people's homes and in the appropriate national language. As far as the data capture is concerned, CAPI (*Computer Assisted Personal Interview*) was used in those countries where this technique was available.

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

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

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

various sample sizes are in rows

various observed results are in columns

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

<sup>1</sup> Figures updated in August 2015