

WE ARE INNOVATION

BRIEFING PAPER

» October 2024

# THE EU'S SMOKE-FREE FUTURE AND THE ROLE OF INNOVATION

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Findings from the Special  
Eurobarometer 539



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# Executive Summary

## Key Findings

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- 1. Slow Progress:** The EU is significantly behind its 2040 smoke-free target, with 24 percent of adults still smoking as of 2023, only a 1 percent decrease since 2020. This slow rate of decline suggests that the EU may not reach its goal until 2100 - a full 60 years after the intended date.
- 2. Innovative Alternatives:** E-cigarettes (vapes), heated tobacco products, and nicotine pouches show promise in accelerating the reduction of smoking rates despite low current usage (3 percent, 2 percent, and <1 percent, respectively, across the EU). These findings are consistent with those from research conducted outside the EU since the introduction of vapes in the [United States](#) and in [New Zealand](#) and of heated tobacco products in [Japan](#). Smoking prevalence in these countries has declined at an accelerated rate in ways correlated with increased uptake of vaping or use of heated tobacco products, respectively.
- 3. Success Stories:** Countries embracing alternative nicotine products (e.g., Czechia, Greece, Sweden) have significantly reduced smoking rates. Comprehensive [research](#) on Sweden, the country closest to achieving a smoking prevalence of 5 percent of the adult population – which public health authorities consider to be smoke-free – evidences the relevance of accessibility, acceptability, and affordability of alternative nicotine products, in complementing traditional smoking cessation and prevention measures and programs.
- 4. Regulatory Impact:** Conversely, restrictive regulation of alternative nicotine products (e.g., in Estonia) correlates with increased smoking rates.
- 5. Smoking “Off-Ramp”:** Alternative nicotine products are predominantly used by current or former smokers rather than attracting people who were not using any nicotine product before. This strengthens the point about the potential of innovative alternatives. The Eurobarometer data shows that most smokers have chosen these alternatives to reduce or quit cigarettes altogether, and also that these alternatives are fulfilling their intended purpose.
- 6. Flavor Importance:** 48 percent of vapers prefer fruit flavors, including in countries where fruit flavors are banned, with 68 percent of those who have tried vaping opposing flavor bans. An [opinion poll](#) conducted in Sweden confirmed that a variety of flavors is critical to making innovative products realistic alternatives to cigarettes. [Consumer research](#) conducted in countries where some flavors were banned demonstrated that most vapers continue to look for their flavors of choice domestically and abroad, including online. In some cases, vapers also manufacture their own flavors.
- 7. Health Equity Awareness:** These products also show the potential to reduce smoking-related health disparities among lower-income groups. Comprehensive [research](#) on Sweden – where alternatives more affordable than cigarettes have contributed to lowering smoking – demonstrates that, compared to the rest of the EU, the Nordic country has 21.2 percent fewer smoking-related deaths, 31.3 percent fewer total cancer deaths (including 36 percent fewer lung cancer deaths and 25.3 percent fewer other smoking-related cancer deaths), and 12 percent fewer cardiovascular disease deaths.
- 8. Economic Potential:** The alternative nicotine product market presents opportunities for innovation, entrepreneurship, and job creation.

# Recommendations

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1. **Policy Reassessment:** Review and revise current strategies to reduce smoking prevalence by complementing traditional measures and programs with innovative alternatives that empower smokers to move and stay away from cigarettes.
2. **Public Health Education:** Implement campaigns to accurately inform the public about the relative risks of different nicotine products.
3. **Regulatory Framework:** Develop regulations for alternative nicotine products to enhance their accessibility, acceptability, and affordability and, consequently, their potential to accelerate the decline of smoking rates.
4. **Targeted Approaches:** Address the needs of demographics resistant to specific alternatives, such as older smokers. Research on vapes in the US evidences that declines in smoking prevalence have been more salient in the age groups up to 54, largely due to minimal vaping prevalence in the age groups above 55. Accessibility of different alternatives to smoking, particularly heated tobacco products, could support the older demographics in moving and staying away from cigarettes.
5. **Flavor Diversity:** Maintain a range of flavors in alternative products to support smokers' moving away from cigarettes. As evidenced by Sweden's experience, the acceptability of alternative nicotine products is as important as their accessibility and affordability to achieve smoke-free status.
6. **Health Equity Focus:** To address health disparities, prioritize making alternative products accessible to lower-income groups. As evidenced by Sweden's experience, the affordability of alternative nicotine products is as important as their accessibility and acceptability to achieve smoke-free status.
7. **Economic Incentives:** Encourage investment in the alternative nicotine product sector to stimulate innovation and job creation.

## Conclusion

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The EU's current trajectory won't achieve its 2040 smoke-free goal. A shift in the strategies to reduce smoking prevalence is necessary, embracing innovative nicotine alternatives alongside traditional measures and programs. This approach offers the potential to accelerate progress towards a smoke-free Europe while addressing health inequities and fostering innovation. Swift action and policy adaptations are crucial to realigning with the EU's public health objectives.

# Introduction

The European Union's ambitious goal of reducing smoking prevalence to 5 percent of its adult population by 2040 – which public health experts consider to be “smoke-free” – faces significant challenges, as revealed by the recently published Special Eurobarometer 539 “Attitudes of Europeans towards tobacco and related products.” This comprehensive analysis inquires into the survey's findings, offering a perspective on the current state of smoking and the potential role of innovative nicotine products in shaping Europe's smoke-free future.

Indeed, the Special Eurobarometer 539, conducted in 2023 by Kantar Public for the European Commission, paints a complex picture. Despite longstanding efforts to curb smoking, the survey indicates that 24 percent of adults in the EU continue to smoke, representing only a marginal 1 percent decrease since 2020. This slow rate of decline suggests that the EU may not reach its smoke-free goal until 2100 – a full 60 years beyond the intended target date.

However, amidst this challenging landscape, the survey also highlights promising trends and innovative approaches that could accelerate progress. The analysis explores how some EU member states, such as Czechia, Greece, and Sweden, have made significant strides in reducing smoking rates by embracing alternative nicotine products and implementing progressive regulatory frameworks. These success stories provide valuable insights for other nations seeking to enhance their strategies to reduce smoking prevalence.

This briefing paper examines the potential of e-cigarettes (vapes), heated tobacco products, and nicotine pouches in offering smokers safer alternatives compared to cigarettes. It analyzes usage patterns, user motivations, and the effectiveness of these products in supporting smoking cessation efforts. Notably, the EU survey suggests that these alternatives primarily serve as an “off-ramp” from smoking rather than an “on-ramp” to nicotine use for non-smokers.

A key focus of our analysis is the role of product diversity and flavor options in making alternative nicotine products acceptable to smokers. The Eurobarometer data reveals strong preferences for fruit flavors among vapers, including in countries where fruit flavors are banned, highlighting the importance of flavor variety in empowering smokers to move and stay away from cigarettes.

The document also explores the broader implications of these findings, including the potential for alternative nicotine products to address health disparities among lower-income groups and stimulate economic growth through entrepreneurship, innovation, and job creation.

This report offers valuable insights for policymakers, public health officials, and stakeholders involved in efforts to reduce smoking prevalence by providing a comprehensive analysis of the Eurobarometer results. It emphasizes the need for a nuanced, evidence-based approach that balances public health goals with the realities of people's preferences and behaviors.

As the EU continues its journey towards a smoke-free future, the lessons drawn from this analysis of the Eurobarometer data could play a crucial role in shaping more effective and inclusive policies to reduce smoking prevalence across the continent.

## Progress Toward the EU Smoke-Free Target?

The European Union (EU) has set an ambitious goal to reduce smoking prevalence to 5 percent of its adult population by 2040. Public health experts define that as being smoke-free. However, the findings from the recently published Special Eurobarometer 539 suggest that the EU is far from achieving this target within the intended timeframe. As of the latest survey, 24 percent of adults in the EU continue to smoke, reflecting only a marginal decrease of 1 percent since the previous survey conducted in 2020.

This slow pace of decline in smoking prevalence highlights the significant challenge the EU faces in meeting its smoke-free target. Given the current rate of progress, projections indicate that the EU will not reach the smoke-free target by 2040. Instead, it could take until 2100—60 years beyond the targeted date—for the EU to achieve a smoking prevalence of 5 percent or less of its adult population. This projection shows the critical gap between the EU's aspirations and the reality of its progress in curbing smoking.

Certainly, the EU's traditional arsenal in the war on smoking appears to be firing blanks. While these measures have undoubtedly made inroads, they seem to have hit a wall of diminishing returns. Policies such as taxation, public-place smoking bans, regulation of products and packaging, and educational campaigns appear insufficient on their own to drive the significant reductions in smoking prevalence required to meet the 2040 target. The Eurobarometer data suggest that without a more comprehensive and innovative approach, including incorporating innovation in nicotine, the EU is unlikely to achieve its smoke-free goal within the desired timeframe. This situation calls for a reassessment of current strategies and the potential integration of additional measures to reduce smoking rates across the EU more effectively. The persistence of a high smoking prevalence despite existing policies indicates that new approaches may be necessary to accelerate progress toward a smoke-free Europe.

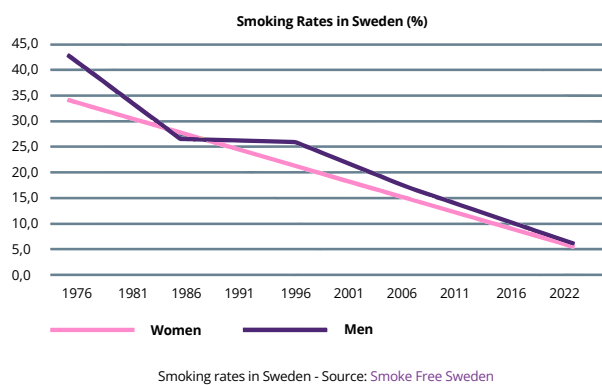
## How Some EU Member States Are Clearing the Air

While the EU as a whole struggles to shake off its smoking habit, a handful of member states are showing signs of hope in the fight against smoking. The latest Eurobarometer data reveals an interesting dichotomy: nations embracing innovative alternatives to smoking are making significant strides, while those clinging to “conventional wisdom” alone are treading water.

In the heart of Central Europe, Czechia has emerged as an unexpected frontrunner in the race towards a smoke-free future. With a remarkable 7 percent plunge in smoking rates since 2020, the country's success story is turning heads across the continent. The secret to their success? A regulatory environment that does not just tolerate but actively supports alternative nicotine products. Thus, vapes are not taxed, while heated tobacco products and vapes are welcome in many spaces where cigarettes are personae non gratae.

Mediterranean Greece – a country once synonymous with heavy smoking – is writing its own chapter. Here, the government has taken a bold step: allowing manufacturers to communicate reduced-risk messages about their products. The result? A 6 percent drop in smoking rates since 2020. This transparency in risk communication appears to be a powerful tool, empowering smokers to make informed decisions and pivot towards innovative alternatives. It is a strategy that is clearing the air in the land of ancient philosophers, one informed choice at a time.

But the crown jewel in Europe's anti-smoking efforts sits in the north. Sweden stands close to a public health triumph, with smoking rates teetering on the edge of the coveted 5 percent mark that defines smoke-free status. The Swedish Public Health Agency reports a 5.6 percent prevalence, while the Eurobarometer suggests a slightly higher 8 percent. Regardless of the exact figure, the trend is clear: Sweden's smoking rates have been in freefall since 2006. The Nordic nation's secret weapon? A *smorgasbord* of alternatives to smoking – from nicotine pouches to snus, vapes to heated tobacco products – all readily accessible, acceptable, and affordable.



### Consistent Trends in Smoking Reduction Outside the EU and Beyond

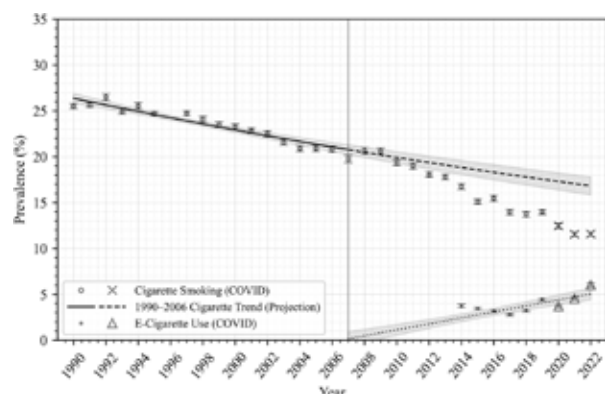
The success observed in European Union member states that have embraced alternatives to smoking is echoed by similar trends in other European countries outside the EU, such as the United States, New Zealand, and Japan.

A quiet revolution is taking place in England, the land of afternoon tea and former smoke-filled pubs. Recent data paint a picture of a nation steadily breaking free from smoking's grip. Daily smoking prevalence has plummeted to 10.4 percent in 2023, a far cry from the 16.4 percent recorded just eight years prior. This remarkable decline is not accidental but the fruit of a comprehensive strategy that dares to think differently. At the heart of England's approach lies a pragmatic embrace of vaping as a less harmful alternative to smoking. By integrating vapes into its public health arsenal, the English government has effectively weaponized innovation in its war on tobacco.

Meanwhile, in the heart of Europe, Switzerland is writing its own success story. Long known for its neutrality, the Alpine nation has decidedly taken sides in the fight against smoking. July 2023 data reveal a 3 percent decline in smoking rates compared to 2017, breaking a stubborn plateau that had previously resisted change. This shift coincides with Switzerland's gradual warming to innovative nicotine products, including increased availability of vapes and other alternatives. While the decline may seem modest, in the context of Switzerland's previously stagnant smoking rates, it represents a significant breakthrough.

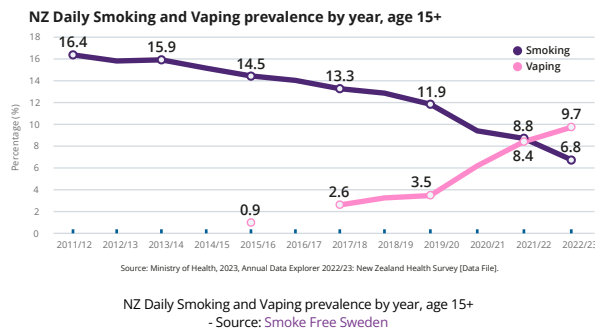
Across the Atlantic, the United States offers a compelling case study on the impact of vaping on smoking prevalence. A recent study published in the Harm Reduction Journal, drawing on data from the National Health Interview Survey (NHIS), tells a tale of an accelerated decline in smoking rates since vaping's introduction in 2007. The correlation between increased vaping uptake and decreased smoking is particularly striking in the age groups up to 54.

However, the American experience also highlights a crucial challenge: the relative imperviousness of older smokers to vaping's allure. Those aged 55 and over have shown minimal engagement with vapes, resulting in stubbornly persistent smoking rates within this demographic. This disparity raises an intriguing question: could alternative products, such as heated tobacco, be tailored to appeal to older smokers' preferences? The potential to expand the reach of this strategy to all age groups looms large, promising even more significant reductions in overall smoking prevalence.



Cigarette smoking and E-Cigarette use prevalence (All Adults)  
- Source: Harm Reduction Journal

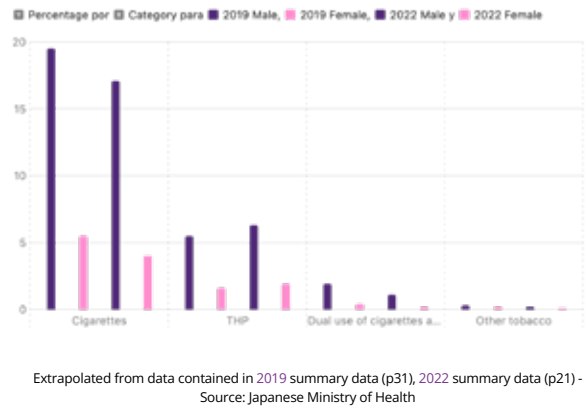
In the southwestern Pacific Ocean, the island nation of **New Zealand** has emerged as a leader in the global fight against smoking. This picturesque country, known for its stunning landscapes and rich Maori culture, has significantly reduced smoking rates through a comprehensive approach that includes embracing harm reduction strategies. The government has set an ambitious goal of becoming smoke-free by 2025, which is defined as having a smoking rate of less than 5 percent. To achieve this, New Zealand has implemented a multi-faceted strategy with a pragmatic approach to vaping and other alternative nicotine products. The government has recognized vaping as a less harmful alternative to smoking. It has implemented regulations that balance adult access with youth protection. This approach, coupled with ongoing public health campaigns and support for smoking cessation, has contributed to a steady decline in smoking rates.



Amidst the delicate balance of Zen gardens and bullet trains, Japan cultivates a novel approach to uprooting the deep-seated habits of smokers worldwide. This technologically advanced country, known for its unique blend of ancient traditions and cutting-edge innovations, has witnessed a remarkable transformation in its tobacco consumption landscape. The Japanese Ministry of Health **data reveals** a significant decrease in smoking rates among both males and females between 2019 and 2022. Overall tobacco use dropped from 16.7 percent to 14.8 percent, with cigarette smoking declining from 19.5 percent to 17.1 percent for males and 5.5 percent to 4 percent for females. Notably, this **reduction coincided** with increased use of heated tobacco products, rising from 5.5 percent to 6.3 percent for males and 1.6 percent to 1.9 percent for females.

The success of heated tobacco products in Japan, which has led to a staggering 52 percent **reduction** in cigarette sales, offers valuable insights into the potential of safer nicotine products to reduce smoking rates globally. This transition, driven primarily by consumers' health concerns, demonstrates that when alternative nicotine products are widely available, many smokers will choose to switch or reduce their cigarette consumption. Japan's unique cultural factors, such as openness to new technology and a strong sense of social responsibility, may have contributed to the rapid adoption of heated tobacco products. However, the overarching lesson is clear: providing smokers with safer

alternatives can lead to substantial reductions in smoking rates. Unlike countries like the UK, where the government actively promotes vaping for smoking cessation, Japan's transformation occurred without strong political endorsement of heated tobacco products. This suggests that when presented with safer alternatives, consumer choice can be a powerful force in driving public health improvements, potentially offering an experience to consider in tobacco harm reduction strategies worldwide.



As we zoom out to view the global picture, a clear pattern emerges: countries that have opened their arms to innovative nicotine alternatives are reaping the rewards.

### Baltic Policy Pitfalls or The Impact of Restrictive Approaches to Smoking Alternatives

In stark contrast to the positive trends observed in countries that have embraced innovative alternatives to smoking, the data from the Eurobarometer highlight a concerning rise in smoking prevalence in countries that have adopted more restrictive approaches. This trend is particularly evident in Estonia, where stringent regulations on smoking alternatives, such as vapes and heated tobacco products, have coincided with an increase in smoking rates.

Estonia **exemplifies** the negative impact of such restrictive policies. The country has implemented a ban on vape flavors beyond tobacco and menthol, severely limiting the acceptability of vaping as an alternative to smoking. Since 2020, Estonia has experienced a troubling 40 percent increase in smoking rates.

The irony is palpable. In their zealous efforts to stamp out all forms of nicotine consumption, these countries may have inadvertently propped up the products that were at the origin of their efforts. Cigarettes, with their entrenched market position and cultural familiarity, have emerged as the unlikely beneficiaries of policies aimed at newer, safer alternatives.

## The Potential of Alternatives to Smoking

The Eurobarometer highlights the significant potential of alternative nicotine products in reducing smoking prevalence across the EU. Despite their relatively low current usage rates, the upward trends in the adoption of vapes, heated tobacco products, and nicotine pouches suggest that these alternatives could play a vital role in the EU's efforts to decrease smoking levels and achieve its long-term public health goals.

As of the most recent survey, vaping prevalence across the EU stands at just 3 percent, use of heated tobacco products at 2 percent, and nicotine pouches at less than 1 percent. These figures indicate that while these alternatives are still in the early stages of adoption, there is considerable room for growth. The potential for these products to substantially reduce smoking rates is significant, particularly if their accessibility, acceptability, and affordability are enhanced through progressive regulatory frameworks. The data also reveal that since 2020, vaping has increased in 17 of the 27 EU member states, indicating a growing acceptance and usage of this alternative among smokers. However, the data also highlights that the penetration of these alternatives is not uniform across the EU. For instance, Ireland is the only country where vaping prevalence has declined, dropping by 2 percent to a current rate of 5 percent.

The relatively low current usage rates of these alternatives, combined with the observed increases in many member states, highlight the challenges and opportunities ahead. On the one hand, the low prevalence of these alternatives indicates that many smokers have yet to switch from cigarettes, suggesting a significant untapped potential. On the other hand, the increasing adoption rates in several countries point to a growing recognition of the benefits of these products as tools for smokers to move and stay away from cigarettes.

## From Combustion to Cessation

The EU survey provides valuable insights into the motivations and outcomes associated with the use of specific alternatives to smoking, particularly heated tobacco products and vapes. The data show that these alternatives are not only being adopted by smokers with the intention of reducing or quitting smoking, but they are also proving effective in achieving these goals for a significant portion of users.

Heated tobacco products, once a niche offering, have surged into the mainstream of alternatives to smoking. The Eurobarometer's findings are revelatory: more than half of users of heated tobacco products report either a reduction in their smoking habits or a complete cessation after adopting these products. This is not just happenstance; the majority of these users turned to heated tobacco products with the explicit intention of cutting down or quitting smoking

altogether. What is driving this shift? The answer lies in the realm of health consciousness. Users are increasingly viewing heated tobacco products as a safer alternative to cigarettes. The implications are profound: heated tobacco products are not just replacing one habit with another; they are serving as a bridge to a smoke-free existence for many Europeans.

However, heated tobacco products are not the only ones in this revolution. Vaping, the more established sibling in the family of innovative alternatives, is cementing its position as a formidable ally in the war against smoking. The data reveals a striking trend: the number of individuals who turned to vaping with the explicit goal of quitting smoking has surged by 12 percent since the 2020 survey. As with heated tobacco products, the driving force behind vaping's uptake is rooted in health concerns. The majority of vapers believe their chosen alternative is less harmful than smoking. This belief is not unfounded; while not entirely risk-free, the scientific consensus largely supports the notion that vaping is less detrimental to health than smoking.

The implications of these trends are far-reaching. The message is clear for policymakers and public health officials: these alternatives are potent tools in the smoking cessation arsenal, not just passing fads. However, the most profound implications are for smokers themselves. For those who have struggled with traditional cessation methods, these alternatives offer a new ray of hope. They provide a familiar ritual and nicotine delivery without the most harmful aspects of combustible cigarettes.

## An "Off-ramp" from Smoking Rather than an "On-ramp" to Nicotine

The Eurobarometer also provides compelling evidence that innovative nicotine products, such as vapes and heated tobacco products, are predominantly used by current or former smokers rather than attracting people who were not using any nicotine product before. This trend highlights the potential of these products as practical tools for smoking cessation, serving as an "off-ramp" from smoking rather than an "on-ramp" to nicotine use.

The data indicate that the prevalence of alternative nicotine product usage among non-smokers is remarkably low. For instance, only a tiny percentage of individuals who have never smoked report vaping, using heated tobacco products, or nicotine pouches. Moreover, the data align with the broader public health objective of providing smokers with viable options that can help them transition away from smoking.

Thus, the Eurobarometer findings support the view that alternative nicotine products are fulfilling their intended purpose: offering current smokers a pathway to reduce their health risks without introducing non-smokers to nicotine.



### The Role of Flavors in the Acceptability of Alternative Nicotine Products

The research shows the crucial role that flavors play in the acceptability of vaping products as alternatives to smoking. The survey reveals that a significant majority of vapers—48 percent—prefer fruit flavors, which has grown by 5 percent since the last survey in 2020. This trend highlights the importance of flavor variety in encouraging smokers to transition to and continue using vaping products as a less harmful alternative to traditional cigarettes.

Interestingly, the preference for fruit flavors remains strong even in countries where fruit flavors are banned. In Denmark, Estonia, Latvia, Lithuania, Hungary, the Netherlands, and Finland—where the range of available vape flavors is limited—fruit flavors still emerge as the most favored option among vapers.

The significance of flavors is further illuminated when considering public opinion on the potential banning of flavors in e-cigarettes. The Eurobarometer reveals a nearly even split among all respondents, with 51 percent in favor and 49 percent against a ban on flavors. However, this division changes dramatically when focusing on those who have tried vaping. Among this group, a substantial 68 percent oppose the ban on flavors. The message is clear: individuals with direct vaping experience recognize the importance of flavors in using these products, which likely contributes to their resistance to such restrictive measures.

These findings from the Eurobarometer align with the 2023 Ipsos and We Are Innovation (WAI) [opinion poll](#) titled “Swedes' Views on the Alternatives to Cigarettes. Usage of Alternative Nicotine Products Among Former Cigarette Smokers.” The Ipsos survey, conducted among Swedish ex-smokers, emphasizes that health concerns are the primary motivator for switching to alternative nicotine products. It also indicates that a variety of flavors and nicotine levels are critical factors to make these products realistic alternatives to cigarettes.

Moreover, the Ipsos poll accentuates the importance of product customization, with 89 percent of ex-smokers highlighting the significance of flavors in choosing an alternative nicotine product. This emphasis on flavor variety is particularly pronounced among women, who place even greater importance on the availability of flavors and nicotine levels when selecting alternative products. The results from Sweden, a country on the brink of achieving smoke-free status, demonstrate how a diverse range of flavors and product options can significantly contribute to reducing smoking rates.

The [position paper](#) by We Are Innovation, “Leading the way to a smoke-free future: The experience of Sweden,” further reinforces these findings. The paper notes that Sweden’s

dramatic 60 percent reduction in smoking rates from 2006 to 2020, the most significant decline among EU member states, can be attributed partly to the combination of strict enforcement measures and the availability of alternative nicotine products. The paper concludes that the acceptability of alternative nicotine products, driven by the availability of various flavors and nicotine levels, is essential for their success as an alternative to smoking. This variety not only encourages initial adoption but also supports long-term use, which is critical for achieving sustained reductions in smoking prevalence.

### Reduction in Tobacco-Related Health Disparities

The survey provides insightful data on the potential role of innovative nicotine products in reducing health disparities, particularly among lower-income groups and individuals who face significant challenges in quitting smoking through traditional methods. The data suggest that these safer alternatives could play a critical role in addressing the uneven burden of smoking-related health issues across different socioeconomic groups.

Indeed, smoking prevalence tends to be higher among lower-income populations and those experiencing financial difficulties, exacerbating health disparities. These groups are often more susceptible to the harms of smoking due to a combination of factors, including higher stress levels, greater exposure to smoking environments, and limited access to smoking cessation resources. Traditional methods of quitting smoking, such as counseling and nicotine replacement therapies, may not be as accessible or effective for these populations, further entrenching the health inequities associated with smoking.

The Eurobarometer data indicate that lower-income groups are more likely to be smokers. Still, they are also showing a growing interest in alternative nicotine products. These alternatives provide a potentially more accessible and acceptable means of reducing smoking and its associated harms. By offering a range of products that cater to different preferences and financial capabilities, strategies to reduce smoking prevalence can help bridge the gap in success rates between various socioeconomic groups.

For instance, the report highlights that a significant proportion of users of heated tobacco products and vapes come from socio-professional categories that include manual workers and individuals with financial difficulties.

What is more, the affordability and variety can make them a more realistic option for lower-income smokers. The availability of such alternatives can reduce the economic burden of smoking-related illnesses on these populations, contributing to a reduction in health disparities. As these products become more widespread and accepted, they have

the potential to significantly improve public health outcomes for those who are most at risk from the harms of smoking.

### **Powering Innovation and Job Creation**

The emerging market for alternative nicotine products presents a significant opportunity for economic growth. As smokers who want to quit increasingly prefer these products, they create new avenues for job creation, innovation, and broader economic benefits. The growth of this market can be particularly influential in supporting sectors such as retail, particularly small and medium-sized enterprises (SMEs).

According to the data extracted from the EU survey, there is an observable trend of increased uptake of vapes and heated tobacco products across various demographics. This trend points to an emerging market that is continuously expanding. For instance, the report notes that 27 percent of EU citizens who tried them regularly use heated tobacco products and vapes, showcasing their growing acceptance. This growing consumer base suggests a rising demand for these products, necessitating increased production, distribution, and sales efforts.

The expansion of this market could stimulate job creation in several areas. The need for innovation in product development, especially concerning flavors and device design, further drives research and development efforts, creating high-skilled jobs and encouraging technological advancements. Moreover, the economic impact extends beyond job creation. The innovation stimulated by this competition can lead to advancements in battery technology, materials science, and digital health monitoring, which could have broader applications.

# Conclusion: The Role of Innovative Nicotine Alternatives in a Smoke-Free Future

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The findings from the Special Eurobarometer 539 “Attitudes of Europeans towards tobacco and related products” reveal the transformative potential of alternative nicotine products in the EU’s journey towards a smoke-free future. As smoking prevalence remains stubbornly high across the region, these products offer a promising avenue for achieving significant public health gains. However, realizing this potential requires reassessing current strategies and integrating innovation that can more effectively address the challenges diverse demographic groups face.

One of the most compelling aspects of these alternatives to smoking is their role as socioeconomic equalizers. The data suggest that usage rates of these products are relatively consistent across different social classes, indicating that they are democratizing access to innovative solutions. This similar distribution across socioeconomic groups highlights the inclusive nature of these products, providing smokers from all walks of life with the tools they need to reduce their health risks. By making alternatives to smoking accessible to lower-income populations who traditionally have had fewer resources to move and stay away from cigarettes, these innovative solutions can contribute to reducing health disparities and promoting more equitable health outcomes.

Besides, the uptake of these alternatives can be seen as an act of personal empowerment. In an era where wellness and self-care trends are increasingly shaping consumer behaviors, adopting these products reflects a proactive approach to health. Smokers are not just passively following public health directives but taking active steps to reduce their potential harm. This aligns with broader societal shifts towards individual agency in health management, where people seek out and adopt practices that align with their personal health goals.

The experiences of countries like Czechia, Greece, and Sweden provide valuable lessons for the rest of the EU. These nations have shown that embracing alternatives to smoking—through policies that prioritize accessibility, acceptability, and affordability—can accelerate progress toward smoke-free goals. Their success stories make the case for complementing traditional measures and programs with innovation, driving down smoking rates and ultimately contributing to improved public health outcomes.

Similarly, consistent reductions in smoking prevalence in countries like England, Switzerland, the United States, New Zealand, and Japan make clear the effectiveness of these strategies on a global scale.

However, the situation in countries that have adopted more restrictive approaches toward alternative nicotine products, Estonia being a clear example, serves as a cautionary tale. These countries have seen increases in smoking prevalence following the implementation of restrictive policies. Overly stringent regulations can stymie progress toward reducing smoking rates. Policymakers must consider the potential benefits of strategies that make these alternatives accessible, acceptable, and affordable if they hope to achieve significant reductions in smoking prevalence.

The findings of this Special Eurobarometer and, in particular, the health-related motivations behind the adoption of these products and that these products are an “off-ramp” from smoking (rather than attracting people who were not using any nicotine product before) suggest that innovative alternatives hold significant promise in contributing to reduce smoking prevalence across the EU. Ensuring that a diverse range of flavors and nicotine levels remain available to consumers is crucial in maintaining the acceptability and effectiveness of these products. For example, the strong opposition to flavor bans among vapers emphasizes this.

# WE ARE INNOVATION

We Are Innovation is a dynamic network of individuals and institutions who deeply believe in innovation's power to drive progress and solve the world's most pressing problems. With over 45 think tanks, foundations, and NGOs based worldwide, We Are Innovation represents the diverse voices of a global civil society committed to advancing human creativity, adopting new technologies, and promoting innovative solutions. Through our collaborative approach and cutting-edge expertise, we are driving global transformative change. To learn more about our work, visit us at <https://weareinnovation.global/>.

