

Multi-Country Survey: July 2021

Q% Report

KEY SPECIFICATIONS

SAMPLE: N=29,484 global general population adults, ages 21+ (approximately n=1,100 per country). A booster sample was used to secure an additional n=200 adult smoker interviews in each country.

GEOGRAPHY: Argentina, Brazil, Colombia, Czech Republic, Dominican Republic, France, Greece, Italy, Japan, Malaysia, Mexico, Morocco, Netherlands, Norway, Poland, Portugal, Romania, Saudi Arabia, South Africa, South Korea, Spain, Sweden, UAE, UK, Ukraine, US

METHOD: Online

MARGIN OF ERROR: ±1%

WEIGHTING: This survey was fielded online in all countries, thus the results are representative of the online population in each country. The data has been weighted by the following variables by country as needed: age, gender, region, nicotine product usage, and ethnicity/nationality.

FIELDWORK DATES: 19 July - 3 August 2021

LANGUAGE: Native

RESEARCH SUPPLIER: Povaddo

Note: Results may not total 100% due to rounding.

S1. What is your age?

7%	21-24
11%	25-29
13%	30-34
12%	35-39
10%	40-44
8%	45-49
7%	50-54
11%	55-59
9%	60-64
6%	65-69
3%	70-74
2%	75 or older

S2. What is your gender?

51%	Male
49%	Female
*%	Prefer not to say

Q1. First, thinking about rules and regulations in this country, please indicate whether you agree or disagree with the following statement:

It would be wrong to exclude any company from discussions about rules and regulations that directly impact the company or its products, no matter the industry.

67%	TOTAL AGREE
8%	TOTAL DISAGREE
37%	Strongly agree
30%	Somewhat agree
18%	Neither agree nor disagree
5%	Somewhat disagree
3%	Strongly disagree
6%	Unsure

Now, switching topics and thinking about national priorities today...

T2. How important do you believe it is for government to dedicate time and resources to reducing smoking rates?

78%	TOTAL IMPORTANT
18%	TOTAL NOT IMPORTANT
42%	Very important
36%	Somewhat important
13%	Not very important
5%	Not at all important
4%	Unsure

Thinking specifically about smoking issues...

Q7. Which of the following statements do you agree with most, even if you don't agree with either fully? (ROTATE)

54%	Offering smokers alternatives to smoking can play a role alongside regulation and taxation to make this country smoke-free.
28%	Increased regulation and taxation on cigarettes are all that is needed to make this country smoke-free.
18%	Unsure

Q8. Do you believe that nicotine naturally occurs in tobacco leaves or not?

- 48% Yes – nicotine naturally occurs in tobacco leaves
 - 25% No – nicotine is something artificial which is added to cigarettes and other nicotine-containing products
 - 26% Unsure
-

Q9. Which of the following do you believe is the primary cause of smoking-related diseases? (RANDOMIZE)

- 33% These are all equally harmful
 - 22% Tar
 - 19% High level of toxicants caused by the burning of tobacco
 - 16% Nicotine
 - 5% Tobacco
 - *% Other (please specify)
 - 5% Unsure
-

Q10. Thinking about the issue another way, please indicate whether you agree or disagree with the following statement:

Nicotine, while addictive and not risk-free, is not the primary cause of smoking-related disease.

- 52% TOTAL AGREE**
 - 34% TOTAL DISAGREE**
 - 16% Strongly agree
 - 36% Somewhat agree
 - 20% Somewhat disagree
 - 15% Strongly disagree
 - 14% Unsure
-

As you go through this survey, there will be a number of references to “smoke-free” products or alternative products. Smoke-free products are meant to encompass alternative products for adult smokers which do not burn tobacco or produce smoke like cigarettes. Examples of these products include e-cigarettes and products that heat tobacco instead of burning it to produce a vapor. These products are not risk free and contain nicotine, which is addictive.

Q11. Do you believe alternatives to cigarettes which remove the burning of tobacco have the potential to significantly reduce the risk of smoking-related diseases?

52% TOTAL YES
35% TOTAL NO
14% Yes – definitely
39% Yes – somewhat
21% No – somewhat not
13% No – definitely not
13% Unsure

T12. Prior to this survey, have you ever heard of, or are you aware of, something called an e-cigarette, also referred to as an electronic cigarette or a vape?

89% Yes
11% No

[IF T12="YES", ASK:]

Q13. And, how familiar would you say you are with e-cigarettes?

42% TOTAL FAMILIAR
58% TOTAL NOT FAMILIAR
13% Very familiar
30% Somewhat familiar
48% Know what they are, but not very familiar
9% Not at all familiar

T14. Prior to this survey, have you ever heard of, or are you aware of, products that heat tobacco instead of burning it, also referred to as a heat-not-burn tobacco product?

47% Yes
53% No

[IF T14="YES", ASK:]

Q15. And, how familiar would you say you are with heat-not-burn products?

42% TOTAL FAMILIAR
58% TOTAL NOT FAMILIAR
12% Very familiar
30% Somewhat familiar
48% Know what they are, but not very familiar
9% Not at all familiar

[IF T12="YES" OR T14="YES", ASK:]

T15. And, in the past six months, have you seen, read, or heard something about e-cigarettes or heat-not-burn tobacco products?

41% Yes
47% No
13% Unsure

[IF T15="YES", ASK:]

T16. And, did what you saw, read, or heard about e-cigarettes or heat-not-burn tobacco products cause any confusion about these products? In other words, did you receive any conflicting or unclear information about either e-cigarettes or heat-not-burn tobacco products?

39% Yes
47% No
15% Unsure

[IF T16="YES", ASK:]

Q16A. And, where specifically did you see, read, or hear something about e-cigarettes or heat-not-burn tobacco products which confused you? Please select all that apply. (RANDOMIZE)

64% Social media
52% Media
46% Friends/Family
22% Public health groups
21% Medical professionals
3% Other (please specify)

Q17. Generally speaking, is your opinion of e-cigarettes and heat-not-burn tobacco products:

46% The same as your opinion of cigarettes
38% Different than your opinion of cigarettes
17% Unsure

[HALF SAMPLE A]

Q18A. Compared to cigarettes, do you believe e-cigarettes are...
(ROTATE TOP-TO-BOTTOM, BOTTOM-TO-TOP, ANCHOR UNSURE)

10%	TOTAL MORE HARMFUL
48%	TOTAL LESS HARMFUL
5%	Much more harmful to health
5%	Somewhat more harmful to health
35%	Equally harmful to health
37%	Somewhat less harmful to health
11%	Much less harmful to health
7%	Unsure

[HALF SAMPLE B]

Q18B. Compared to cigarettes, do you believe heat-not-burn tobacco products are...
(ROTATE TOP-TO-BOTTOM, BOTTOM-TO-TOP, ANCHOR UNSURE)

11%	TOTAL MORE HARMFUL
41%	TOTAL LESS HARMFUL
5%	Much more harmful to health
6%	Somewhat more harmful to health
35%	Equally harmful to health
34%	Somewhat less harmful to health
8%	Much less harmful to health
13%	Unsure

Q19. Please indicate whether you agree or disagree with the following statements:

Smoke-free products, such as e-cigarettes and heat-not-burn tobacco products, can be better alternatives to cigarettes for adults who would otherwise continue to smoke.

60%	TOTAL AGREE
28%	TOTAL DISAGREE
16%	Strongly agree
45%	Somewhat agree
16%	Somewhat disagree
12%	Strongly disagree
12%	Unsure

T20. Please indicate whether you agree or disagree with the following statement:

Adult smokers who would otherwise continue smoking cigarettes should have access to, and accurate information about, smoke-free alternatives which are scientifically proven to be better than continued smoking.

79% TOTAL AGREE
12% TOTAL DISAGREE
 37% Strongly agree
 42% Somewhat agree
 8% Somewhat disagree
 4% Strongly disagree
 9% Unsure

Q21. For each of the following, please indicate whether you believe they have a responsibility to objectively review and consider scientific evidence about smoke-free alternative products such as e-cigarettes and heat-not-burn tobacco products. (RANDOMIZE)

	Yes— definitely	Yes	No	No— definitely not	Unsure	TOTAL YES	TOTAL NO
Intergovernmental organizations such as the World Health Organization	48%	35%	5%	3%	9%	83%	8%
Your national/federal government	39%	38%	9%	4%	11%	77%	12%
Public health charities/non-governmental organizations (NGOs)	32%	40%	12%	5%	12%	71%	17%
Your state/regional government	29%	37%	16%	6%	12%	66%	22%

Q22. And, do you believe these governments have a responsibility to objectively review and consider scientific evidence about smoke-free alternative products which comes from manufacturers?

82% TOTAL YES
9% TOTAL NO
 39% Yes – definitely
 42% Yes
 7% No
 2% No – definitely not
 9% Unsure

[HALF SAMPLE A]

Q23A. Do you believe that intergovernmental organizations like the World Health Organization have a responsibility to provide adult smokers with evidence-based information about alternatives such as e-cigarettes and heat-not-burn tobacco products?

83%	TOTAL YES
9%	TOTAL NO
43%	Yes – definitely
40%	Yes
7%	No
2%	No – definitely not
8%	Unsure

[HALF SAMPLE B]

Q23B. Do you believe that public health charities/nongovernmental organizations (NGOs) have a responsibility to provide adult smokers with evidence-based information about alternatives such as e-cigarettes and heat-not-burn tobacco products?

72%	TOTAL YES
17%	TOTAL NO
29%	Yes – definitely
42%	Yes
14%	No
4%	No – definitely not
11%	Unsure

T24. Do you support or oppose tobacco companies working with governments, regulators, and public health experts to ensure that smokers have access to and accurate information about alternative products like e-cigarettes and heat-not-burn tobacco products?

72%	TOTAL SUPPORT
16%	TOTAL OPPOSE
32%	Strongly support
40%	Somewhat support
10%	Somewhat oppose
7%	Strongly oppose
12%	Unsure

T25. Do you believe the government needs to consider the role alternative products can play in making this country smoke-free?

79% TOTAL YES
11% TOTAL NO
32% Yes – definitely
47% Yes
8% No
3% No – definitely not
10% Unsure

T26. If it was possible to end cigarette sales within 10-15 years in this country by having all smokers quit tobacco and nicotine altogether, and – for those who don't quit - to switch to scientifically proven alternative products, do you believe the government should dedicate time and resources to making this a reality?

71% TOTAL YES
17% TOTAL NO
31% Yes – definitely
40% Yes
12% No
5% No – definitely not
12% Unsure

Q27. Please indicate whether you agree or disagree with the following statement:

Tobacco companies can make a positive and significant contribution to the phase out of cigarettes if they develop smoke-free alternatives that are scientifically substantiated to be less harmful than continued smoking and dedicate time and resources to switch smokers to these alternatives.

77% TOTAL AGREE
12% TOTAL DISAGREE
33% Strongly agree
44% Somewhat agree
8% Somewhat disagree
4% Strongly disagree
10% Unsure

Now, a few final questions for statistical purposes...

D1-3. Please indicate whether you are a regular user, occasional user, former user, or have never used each of the following. (RANDOMIZE)

	Regular User	Occasional User	Former User	Never Used	TOTAL USER	TOTAL NON-USER
Cigarettes	17%	7%	31%	45%	23%	77%
E-cigarettes	7%	10%	11%	73%	17%	83%
Heat-not-burn tobacco products	5%	8%	7%	81%	12%	88%

[ASK TO CURRENT OR OCCASIONAL CIGARETTE SMOKERS WHO NEVER USED-E-CIGARETTES OR HEAT-NOT-BURN TOBACCO PRODUCTS]

Q28. What are some of the reasons why you have not considered smoke-free alternative products such as e-cigarettes or heat-not-burn tobacco products? Please select all that apply. (RANDOMIZE)

- 41% I am not convinced these products would be satisfactory (e.g. taste, smell, ease of use, etc.)
- 35% I am not sure about the science behind these products
- 33% I don't have enough information about how these products differ from cigarettes
- 32% It is easier to buy cigarettes than alternative products
- 32% These products cost too much
- 4% These products are not legally available where I live
- 8% Other (please specify)
- 6% Unsure

[ASK TO CURRENT OR OCCASIONAL CIGARETTE SMOKERS WHO ARE NOT USING E-CIGARETTES OR HEAT-NOT-BURN TOBACCO PRODUCTS]

T29. Please indicate whether you agree or disagree with the following statement:

I would be more likely to consider switching to alternative products like e-cigarettes and heat-not-burn tobacco products if I had clarity on how these products differ from cigarettes and the science behind them.

- 63% TOTAL AGREE**
- 26% TOTAL DISAGREE**
- 25% Strongly agree
- 38% Somewhat agree
- 14% Somewhat disagree
- 12% Strongly disagree
- 11% Unsure

[ASK TO CURRENT OR OCCASIONAL E-CIGARETTE/HEAT-NOT-BURN TOBACCO USERS WHO ARE FORMER SMOKERS]

Q30. In thinking about your decision to switch from cigarettes to e-cigarettes or heat-not-burn tobacco products, how important was it to have accurate information about how these products differ from cigarettes?

91%	TOTAL IMPORTANT
7%	TOTAL NOT IMPORTANT
57%	Very important
34%	Somewhat important
6%	Not very important
1%	Not at all important
2%	Unsure

D4. Thinking about national-level elections in this country, do you tend to vote in these elections all of the time, most of the time, some of the time, rarely, or never?

55%	All of the time
21%	Most of the time
10%	Some of the time
6%	Rarely
8%	Never

THANK AND CLOSE SURVEY
